



# Siebel Consumer Goods Guide

Version 8.0

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# Contents

## **Chapter 1: What's New in This Release**

## **Chapter 2: Consumer Goods Product Overview**

- About Siebel Consumer Goods 13
- Key Features of Siebel Consumer Goods Products 14
- About Product Modules and Options 17
- About Business Functions of Screen Tabs 18

## **Chapter 3: Getting Started**

- Siebel Consumer Goods Administrative Setup Tasks 23
- Selected Setup Procedures 25
  - Creating Periods 25
  - Setting Up Siebel Workflow Processes for Consumer Goods 27

## **Chapter 4: Managing Accounts**

- About Accounts 31
- Scenario for Setting Up and Maintaining Accounts 32
- Process of Managing Accounts 33
- Creating or Modifying Accounts 34
- Deleting Accounts 37
- Setting Up Account Hierarchies 37
- Profiling Accounts 38
- Creating Addresses for Accounts 39
- Removing Yourself from Account Teams (End User) 39
- Associating Activities with Accounts (End User) 40
- Associating Contacts with Accounts (End User) 41
- Adding Merchandising Locations to Accounts (End User) 41

## Chapter 5: Products

- About Catalog and Product Administration for Consumer Goods 43
- About Catalog Category Hierarchies 43
- Scenario for Setting Up and Managing Products 44
- Process of Managing Products 45
- Defining Products 46
- Defining Product Lines 48
- Using the Product Explorer (End User) 49

## Chapter 6: Product Distribution

- About Controlling Product Distribution 51
  - About Distribution Lists 52
  - About Account Market Segments 52
  - About Buying Groups 53
- Scenarios for Managing Product Distribution 53
- Process of Managing Product Distribution 54
- About Creating and Modifying Distribution Lists 55
  - Creating Distribution Codes 56
  - Creating a Distribution List 57
  - Deleting Products from a Key Account Distribution List 58
  - Amending a Distribution List 59
- Setting Up Account Channel Values 60
- Assigning Product Categories to Account Catalogs 60
- Viewing and Modifying Distribution List Products (End User) 61
- Reviewing Account Catalogs (End User) 62
- Creating Buying Groups (End User) 63
  - Associating Sources of Supply with a Product (End User) 64
- Associating Account Products with Merchandising Locations (End User) 65
- About Product Distribution Configuration 66
  - Apply Button for an Authorized Distribution List 67

## Chapter 7: Sales Volume Planning

- About Sales Volume Planning (SVP) 69
  - About Basis, Baseline Planning, and Baseline Data Elements 71
  - About Buttons and Methods Used in SVP 71

Scenario for Using SVP	72
Process of Sales Volume Planning	73
Setting Up a Category-Product Hierarchy	74
Setting Up the Account Hierarchy	74
Creating a Category-Product Hierarchy	74
Associating Products with Categories	75
Acquiring Categories	76
Deleting Products and Categories	77
Defining the SVP Hierarchy	77
About the SVP Aggregate Action Process	80
Performing the Initial Aggregation	81
(Optional) Process of Running Aggregation Processing in Parallel	82
Populating Locks	84
Establishing a Baseline Basis Quantity	84
Generating Baseline Basis Quantities for Existing Products	85
Generating Baseline Basis Quantities for New Products	86
Precalculating an Adjusted Baseline Basis Quantity	87
About SVP Algorithms	88
Copying Baseline Information to Additional Fields	89
Manually Entering SVP Data	91
Performing Ongoing SVP Administration Tasks	91
Creating SVP Periods	92
Importing or Copying SVP Data	92
Resetting Account and Category Levels	92
Performing Periodic Aggregations	93
Allocating Changes Down Multiple Levels of the Account Hierarchy	93
Resetting SVP Hierarchy Levels	93
Resetting SVP Hierarchy Locks	93
About SVP Data (End User)	94
Viewing SVP Data (End User)	94
About Querying the Category and Product Lists (End User)	95
Skipping SVP Source Data (End User)	95
Locking and Modifying SVP Data (End User)	96
About Category and Account Level Allocation (End User)	98
Number Handling and SVP Actions and Percentage-Basis Calculation	99
About Configuring Siebel Consumer Goods for SVP	99

- (Optional) Modifying the SVP Business Service 100
- (Optional) Configuring SVP Category Aggregation and Mass Change 100

## **Chapter 8: Trade Promotions**

- About Trade Promotions 105
- Scenario for Setting Up and Carrying Out Trade Promotions 106
- Process of Managing Trade Promotions 106
- Creating Corporate Promotions 107
- Adding Promoted Categories to Corporate Promotions 108
- Adding Products to Promoted Categories 109
- Attaching Literature to Corporate Promotions 109
- Viewing Corporate Promotions (End User) 110
- Simulating Promotions for Promoted Products and Categories (End User) 112
- Viewing and Copying Lift Factors (End User) 115
- Creating Plans (End User) 116
  - Obtaining Approvals for a Plan 118
- Enabling Phasing for Promotions (End User) 119
- Creating Deals for Promotions (End User) 121
- Working with Promoted Categories (End User) 122
  - Adding Promoted Categories to Account Promotions 122
  - Phasing a Promoted Category 123
  - Creating a Deal for a Promoted Category 127
  - Associating Products with a Promoted Category 129
- Working with Promoted Products (End User) 130
  - Phasing a Promoted Product 130
  - Creating a Deal for a Promoted Product 132
  - Associating Baseline and Shipment Data with Promoted Products 132
- Working with Promotions (End User) 135
  - Adding Attachments to Promotions 135
  - Associating Objectives with Promotions 135
  - Committing Target Account Lists to a Corporate Promotion 136
  - Creating Promotions for an Account 136
  - Finalizing a Promotion 137
- About Configuring Trade Promotions 138
  - Configuring the Spread Button 138
  - Retaining Account Promotions When Deleting Corporate Promotions 140

Specialized Methods Invoked	141
User Properties	142
Products Button	143

## Chapter 9: Trade Funds

About Consumer Goods Funds	145
Scenario for Managing Consumer Goods Funds for Promotions	146
Process of Managing Trade Funds	146
Creating a Fund	147
Adding a Child Fund to a Parent Fund	150
Adjusting a Fund	151
Reviewing Deals	151
Reviewing Fund Payments	153
Reconciling a Deal	154
Closing a Deal	154
Forecasting Accrual Funds (End User)	154
Transferring Fund Amounts (End User)	156
Approving a Fund Transfer (End User)	156
Submitting Payments Against Funds (End User)	157
Reviewing Funds, Deals, and Payments (End User)	158
About Configuring Information for Consumer Goods Funds	160
Rolling Up Paid Payments	160
Using Consumer Goods Payment	161
Using Consumer Goods Payment Business Service	162
Setting User Properties for Funds	164
Configuring Enterprise Integration Manager for Funds	165
Specialized Methods Invoked in Trade Funds	165

## Chapter 10: Deductions

About Deductions	167
About Types of Deductions	168
About Generating a Deduction	168
About Resolving Deductions	168
Scenarios for Managing and Resolving Deductions	168
Scenario for Managing Promotions Deductions	169
Scenario for Managing HQ Deductions	169

Process of Managing Promotions Deductions	170
Creating and Editing Deductions	171
Adding Literature to Deductions	172
Splitting Deductions	173
Creating Credit Memos	173
Analyzing Workloads	174
Creating Activity Templates	175
Reviewing Deductions (End User)	175
Viewing Account Deductions (End User)	176
Creating Deduction Activities (End User)	176
Creating Deduction Activity Plans (End User)	177
Associating and Modifying Invoices (End User)	177
Creating Deduction Attachments (End User)	178
Creating Deduction Notes (End User)	178
Reviewing Account Credit Memos (End User)	178
Reviewing Deduction Literature (End User)	179
Resolving Deductions (End User)	179

## **Chapter 11: Objectives**

About Objectives	185
Scenario for Creating and Fulfilling Sales Objectives	186
Process of Working with Objectives	186
Creating an Objective	187
Creating Recommended Activities for an Objective	188
Targeting Accounts to Objectives	190
Creating Child Objectives	191
Changing the Dates for Objectives	191
Applying Objectives	192
Scheduling Store Visits	192
Reviewing Objectives (End User)	192
Changing the Status of Activities (End User)	193
Checking the Status of Objectives (End User)	194



About Configuring Objectives 194

## **Chapter 12: Retail Execution**

About Retail Execution 197

Scenario for Retail Execution 198

Process of Performing Retail Execution 198

Preparing for Retail Visits (End User) 199

Planning Retail Visits (End User) 199

Starting Retail Visits (End User) 201

Performing Retail Activities (End User) 201

    Performing Merchandising Audits 202

    Performing a Retail Assessment 203

    Exchanging Products Between Sales Representatives 203

    Performing a Retail Audit 204

    Reviewing Store Conditions 204

Creating Retail Activities (End User) 205

Reviewing Account Information (End User) 206

Ending a Retail Visit (End User) 207

About Configuring Retail Execution 208

## **Chapter 13: Routes**

About Routes 209

Scenarios for Creating and Using Routes 209

    Creating Routes for Retail Sales Representatives 210

    Retail Managers Creating Routes for Sales Representatives 210

    Creating Routes That Change Frequently 211

Process of Creating and Using Routes 211

Creating Routes (End User) 211

Adding Accounts to Routes (End User) 212

Assigning Target Lists to Routes (End User) 214

Using Routes to Schedule Visits (End User) 215

About Configuring Routes 216

## **Chapter 14: Account Targeting**

About Account Targeting 219

Scenarios for Account Targeting	220
Key Account Managers Creating Target Lists for Sales Representatives	220
Creating Target Lists for Sales Representatives	221
Process of Account Targeting	222
Making a Predefined Query Public	222
Deleting a Saved Predefined Query	223
Creating a Target List (End User)	223
Saving a Target List (End User)	225

## **Chapter 15: Inventory and Order Management**

About Inventory and Order Management	227
Scenario for Managing Inventory and Orders	228
Process of Managing Inventory and Orders	229
Associating Assets with Inventory Locations (End User)	229
Recording Van Information (End User)	229
Verifying Van Inventory (End User)	230
Reviewing Billings (End User)	231
Taking Retail Orders (End User)	232
Recording Deposits (End User)	233

## **Index**

# 1

## What's New in This Release

### What's New in Siebel Consumer Goods Guide, Version 8.0

Table 1 lists changes described in this version of the documentation to support release 8.0 of the software.

Table 1. New Product Features in Siebel Consumer Goods Guide, Version 8.0

Topic	Description
<a href="#">"Apply Button for an Authorized Distribution List" on page 67</a>	This new topic provides information about ensuring that the Apply button functions properly.
<a href="#">"Enabling Phasing for Promotions (End User)" on page 119</a>	This new topic describes how to set up phasing functionality for promotions.
<a href="#">"Phasing a Promoted Category" on page 123</a>	This new topic explains how to phase a promoted category.
<a href="#">"Recalculating a Category's Phasing Result" on page 124</a>	This new topic covers recalculating the phasing result for a promoted category.
<a href="#">"Creating a Deal for a Promoted Category" on page 127</a>	This topic was updated to include new fields used in phasing.
<a href="#">"Phasing a Promoted Product" on page 130</a>	This new topic explains how to phase a promoted product.
<a href="#">"Recalculating a Product's Phasing Result" on page 131</a>	This new topic covers recalculating the phasing result for a promoted product.
<a href="#">"Associating Baseline and Shipment Data with Promoted Products" on page 132</a>	This topic was updated to include a description of the new Aggregate button and to revise the description of the Products button and the Spread button.
<a href="#">"Finalizing a Promotion" on page 137</a>	This new topic explains how to prevent other users from changing a phasing result.
<a href="#">"Specialized Methods Invoked" on page 141</a>	This topic was updated to include the new buttons and methods for phasing and aggregation.
<a href="#">"User Properties" on page 142</a>	The Add Authorized Products Only property was deleted from this topic, and the Use ADL property was added.
<a href="#">"Targeting Accounts to Objectives" on page 190</a>	The procedure in this topic for adding a target account to an objective was modified. Also, a new procedure for deleting a target account from an objective was added.
<a href="#">"Assigning Target Lists to Routes (End User)" on page 214</a>	This topic was revised to include new information about the default values for some account fields.



# 2

## Consumer Goods Product Overview

This chapter provides a brief overview of the Consumer Goods application. Topics include:

- [“About Siebel Consumer Goods” on page 13](#)
- [“Key Features of Siebel Consumer Goods Products” on page 14](#)
- [“About Product Modules and Options” on page 17](#)
- [“About Business Functions of Screen Tabs” on page 18](#)

### About Siebel Consumer Goods

Oracle’s Siebel Consumer Goods is a multichannel application designed for the consumer goods industry. These products help consumer goods manufacturers manage relationships across the entire demand chain. Marketing, sales and customer service applications are fully integrated, and are designed to manage the various complex interactions and relationships between brand owners, their partners (including brokers and distributors), their customers, and the end consumer. Siebel Consumer Goods provides customer, partner and employee relationship management solutions for companies in the following industry segments:

- Food, beverage, and tobacco
- Over-the-counter (OTC) drugs and health-and-beauty aids (HBA)
- Household goods
- Consumer media
- Appliances and electronics

## Key Features of Siebel Consumer Goods Products

Table 2 describes how Siebel Consumer Goods applications can provide solutions for key business issues. The solutions described include optional features and modules, which might differ from your company's implementation of the Consumer Goods.

Table 2. Siebel Consumer Goods Solutions for Key Business Issues

Business Issue	Siebel Consumer Goods Solutions
Account management	<ul style="list-style-type: none"> <li>■ Management of accounts through multilevel account hierarchies based on complex account relationships</li> <li>■ Management of account and customer information through profiles</li> </ul>
Agreement management	<ul style="list-style-type: none"> <li>■ Automated production of agreements from accepted quotes</li> <li>■ Coordination of pricing information</li> <li>■ Assigning of standard terms, conditions, and features</li> <li>■ Tracking to make sure that agreements and service entitlements are fulfilled</li> </ul>
Audit trail	<ul style="list-style-type: none"> <li>■ Creation of a history of all the changes that have been made to various kinds of information</li> <li>■ Records show who has accessed an item, what operation has been performed, when it was performed, and how the value was changed</li> <li>■ Useful for maintaining security, examining the history of a particular record, and documenting modifications for future analysis and record keeping</li> </ul>
Billing management	<ul style="list-style-type: none"> <li>■ Integration with back-office billing systems</li> <li>■ Query and display of billing information</li> <li>■ Management of payment information, payment plans, bill adjustments, and bill profiles</li> </ul>
Brand management	<ul style="list-style-type: none"> <li>■ Management of brands through account distribution lists and personalization attributes</li> <li>■ Dynamic matching of accounts and products to make sure that accounts get the appropriate products</li> </ul>

Table 2. Siebel Consumer Goods Solutions for Key Business Issues

Business Issue	Siebel Consumer Goods Solutions
Call center optimization	<ul style="list-style-type: none"> <li>■ Single desktop to manage multiple types of customer interactions</li> <li>■ Computer telephony integration (CTI) to connect callers with the most qualified agent</li> <li>■ Integrated Web and Interactive Voice Response (IVR) self-service functionality</li> </ul>
Credit management	<ul style="list-style-type: none"> <li>■ Integration with a back-office credit system</li> <li>■ Management of credit alerts</li> <li>■ Notification of customers who are delinquent in payments</li> </ul>
Customer acquisition	<ul style="list-style-type: none"> <li>■ Analytical tools for segmenting prospects and developing targeted campaigns</li> <li>■ Campaign management tools for developing and executing multichannel campaigns</li> <li>■ Prebuilt performance analysis tools</li> <li>■ Call scripting, which delivers messages that use proactive selling and retention techniques during customer contacts</li> <li>■ Intelligent territory assignment, lead scoring, and routing</li> </ul>
Customer and partner applications	<ul style="list-style-type: none"> <li>■ eService, which allows your customers to create and track their own trouble tickets and service requests, and to search for answers to frequently asked questions (FAQs), through the Internet</li> <li>■ eSales, which allows your customers to browse through your company's products and services, customize them, and then purchase them, through the Internet</li> </ul>
Customer retention	<ul style="list-style-type: none"> <li>■ Comprehensive customer profile that is shared throughout the enterprise</li> <li>■ Sales tools that increase sales effectiveness and maximize time spent building relationships</li> <li>■ Tools for marketing analysis, campaign development, and execution</li> </ul>

Table 2. Siebel Consumer Goods Solutions for Key Business Issues

Business Issue	Siebel Consumer Goods Solutions
Analytics	<ul style="list-style-type: none"> <li>■ Encapsulates best practices across Siebel Business applications</li> <li>■ Enables self-service access to intelligence across business applications</li> <li>■ Delivers proactive intelligence around trade funds, promotion evaluation, sales performance, and retail execution</li> <li>■ Uses existing enterprise data sources</li> </ul>
Equipment and infrastructure	<ul style="list-style-type: none"> <li>■ Management of physical assets available at a customer site</li> <li>■ Tracking of equipment sales to accounts</li> <li>■ Management of meters and assets</li> </ul>
Fraud management	<ul style="list-style-type: none"> <li>■ Integration with a back-office fraud management system</li> <li>■ Management of fraud alerts</li> <li>■ Definition of relevant thresholds for customer fraud profiles</li> <li>■ Classification of customer accounts to indicate the likelihood of fraud</li> <li>■ Management of customer accounts that are either late in settlement or delinquent</li> </ul>
Order configuration and management	<ul style="list-style-type: none"> <li>■ Siebel Configurator automates the generation of quotes and sales orders</li> <li>■ Tracking of relationships between sales, sales orders, and work orders</li> <li>■ Definition of process rules and automatic escalation of open sales orders</li> <li>■ Use of product parameters in generating sales orders</li> <li>■ Provisioning of sales orders through work orders</li> <li>■ Incorporating complex attributes such as style, color, size, and multiple ship-to destinations</li> </ul>
Pricing management	<ul style="list-style-type: none"> <li>■ A set of tools for defining pricing adjustments and the conditions under which they are applied</li> <li>■ An engine that evaluates condition statements and determines which pricing adjustments to apply</li> <li>■ A testing area that allows assessment of the pricing adjustments</li> <li>■ Integration with end-user interfaces such as Quotes, Orders, Siebel eSales, and Siebel Configurator</li> </ul>



Table 2. Siebel Consumer Goods Solutions for Key Business Issues

Business Issue	Siebel Consumer Goods Solutions
Information analysis and marketing	<ul style="list-style-type: none"> <li>■ Analysis of customer information and measurement of campaign results with marketing analytics</li> <li>■ Creation and execution of targeted marketing campaigns</li> <li>■ Internet marketing with Siebel Marketing: integrated email campaigns, customized Web offers, personalized Web pages, Internet newsletters, and Internet surveys</li> </ul>
Third-party and legacy integration	<ul style="list-style-type: none"> <li>■ Prebuilt COM and CORBA interfaces to leading Operating System Software (OSS) and Enterprise Resource Planning (ERP) applications</li> <li>■ Integration mapping tools for cross-application process integration</li> <li>■ Siebel Enterprise Integration Manager (EIM), which allows bidirectional data exchange and synchronization</li> <li>■ Performing credit verification and address validation</li> <li>■ Maintenance of billing accounts through an external billing system</li> </ul>
Service request management	<ul style="list-style-type: none"> <li>■ Single platform for logging, assigning, managing, and resolving customers' problems</li> <li>■ Online solutions search capability</li> <li>■ Proactive customer notifications through email, pager, fax, and Internet</li> <li>■ Automatic escalation of overdue service requests</li> </ul>
Up-selling and cross-selling	<ul style="list-style-type: none"> <li>■ Scripting engine that identifies up-sell and cross-sell opportunities with every customer contact</li> <li>■ Provide an atmosphere of suggestive selling with the ability to build complex assortment plans</li> </ul>

## About Product Modules and Options

You can purchase many Siebel Business Applications modules for use with Siebel Consumer Goods. You can also purchase optional modules specific to Siebel Consumer Goods to provide enhanced functionality for various business processes.

For information about the optional modules that can be used with Siebel Consumer Goods applications, contact your Oracle sales representative or local Oracle Sales Office.

**NOTE:** This guide documents the standard Siebel Consumer Goods applications with all of the optional modules specific to Consumer Goods functionality installed. The Sample database includes data for these optional modules. If your installation does not include some of these optional modules, your software interface will differ from that described in some topics of this guide.

The exact configuration of Siebel Consumer Goods screens, views, and fields depends on your company's configuration of the application.

For introductory information about using the Siebel Consumer Goods standard interface, see *Siebel Fundamentals*.

## About Business Functions of Screen Tabs

The Siebel Consumer Goods interface includes task-specific screens. Some screens are used exclusively by administrators.

Table 3 lists the most frequently used Siebel Consumer Goods screens and the business functions of the views in those screens.

Table 3. Siebel Consumer Goods Screens

Screen	Functions of the Views in This Screen	Location of Information About This Screen
Accounts	Create, view, and update accounts. Set up and maintain account hierarchies. Define and maintain account profile information.	<a href="#">Chapter 4, "Managing Accounts"</a> in this guide  <a href="#">Chapter 6, "Product Distribution"</a> in this guide
Activities	Manage activities with accounts, contacts, opportunities, and service requests, and create contact and account calls (with or without Smart Calls).	<i>Siebel Applications Administration Guide</i>
Agreements	Manage information about agreements, administrative contracts, and entitlements.	<i>Siebel Field Service Guide</i>
Assets	Manage information about products sold to accounts.	<i>Siebel Field Service Guide</i>
Audit Trail	Automatically creates a history of the changes that have been made in the application.	<i>Siebel Applications Administration Guide</i>
Calendar	Create and display activities (including to-do activities) and share calendar information with co-workers.	<i>Siebel Fundamentals</i>

Table 3. Siebel Consumer Goods Screens

Screen	Functions of the Views in This Screen	Location of Information About This Screen
Campaigns	Manage outbound communications with prospects targeted for a particular marketing effort.	<i>Siebel Applications Administration Guide</i>
Contacts	Record and track business and personal contact information associated with an account, an opportunity, a trouble ticket, or service request.	<i>Siebel Applications Administration Guide</i>
Corporate Promotions	Manage company-wide promotions of a product or category of products in which accounts can participate.	<a href="#">Chapter 8, "Trade Promotions"</a> in this guide
Cycle Counting	Manage inventory by grouping assets into classes and counting each class's assets over a period and at designated intervals.	<i>Siebel Field Service Guide</i>
Deductions	Manage the deductions process.	<a href="#">Chapter 10, "Deductions"</a> in this guide
Expense Reports	Manage expense-report information for your own expenses, or your team's expenses.	<i>Siebel Applications Administration Guide</i>
Forecasts	Create business forecasts based on opportunities or products.	<i>Siebel Applications Administration Guide</i>
Groups	Create buying groups and planning groups, which allow account managers to plan for aggregate demand from multiple accounts.	For information about buying groups, see <a href="#">Chapter 6, "Product Distribution"</a> in this guide
Literature	Display company- and industry-related literature cataloged by the administrator.	<i>Siebel Applications Administration Guide</i>
Objectives	Help drive corporate goals by defining objectives for contacts and accounts and monitor progress towards meeting sales goals.	<a href="#">Chapter 11, "Objectives"</a> in this guide
Opportunities	Manage sales opportunities for business and residential customers.	<i>Siebel Applications Administration Guide</i>
Orders	Create sales orders and track their status. Generate order summaries.	<i>Siebel Order Management Guide</i>
Part Browser	Check on-hand inventory.	<i>Siebel Field Service Guide</i>
Plans	Organize trade promotions by account.	<a href="#">Chapter 8, "Trade Promotions"</a>
Products	Enter and maintain products, product images, product lines, product features and price list definitions.	<a href="#">Chapter 5, "Products"</a> in this guide

Table 3. Siebel Consumer Goods Screens

Screen	Functions of the Views in This Screen	Location of Information About This Screen
Promoted Products	Designate the products that are included in a promotion.	<a href="#">Chapter 8, "Trade Promotions"</a> in this guide
Promotions	Plan and manage account specific trade promotions.	<a href="#">Chapter 8, "Trade Promotions"</a> in this guide.
Quality	Manage information about adverse events or reactions related to products.	<i>Siebel Applications Administration Guide</i>
Receiving	Record and review information relating to a physical receipt of material.	<i>Siebel Field Service Guide</i>
Repairs	Track defective products returned to a service center for repair.	<i>Siebel Field Service Guide</i>
Routes	Manage retail outlets by creating sales routes. Add individual accounts to a specific Route that can be incorporated into a mobile field professional's routine visit schedule.  These routes can be used to schedule store visits on regular, predefined intervals.	<a href="#">Chapter 13, "Routes"</a> in this guide
Service Inventory	Manage the service parts inventory process.	<i>Siebel Field Service Guide</i>
Service Requests	Create, display, and update customer requests for information about or assistance with products or services.	<i>Siebel Field Service Guide</i>
Shipping	Record and review information relating to a physical shipment of material.	<i>Siebel Field Service Guide</i>
SmartScript	Define the application workflow for an interactive situation in a script. These interactive situations can include inbound communications (such as customer service) and outbound contacts (such as telemarketing).	<i>Siebel SmartScript Administration Guide</i>
Solutions	Search, organize, and add to a knowledge base of answers to service requests and trouble tickets.	<i>Siebel Field Service Guide</i>
Targeting	Identify accounts by querying on profile information (such as sales volumes or location) to generate a list of accounts. The list can be used to schedule visits and plan routes.	<a href="#">Chapter 14, "Account Targeting"</a> in this guide





# 3

## Getting Started

This chapter lists the applications administration tasks that are specific to Siebel Consumer Goods applications. Topics include:

- [“Siebel Consumer Goods Administrative Setup Tasks” on page 23](#)
- [“Selected Setup Procedures” on page 25](#)

Use this chapter in combination with the *Siebel Applications Administration Guide*.

The *Siebel Applications Administration Guide* covers the setup tasks that are common to all Siebel Business Applications, such as using license keys, defining employees, and defining your company's structure. It also provides the information you need to implement, configure, and monitor the Siebel sales, service, and marketing products and to perform data administration and document administration tasks. Some tasks discussed in this chapter might replace the corresponding ones in the administration guide, whereas others might be additional tasks. Make sure you review [Table 4 on page 24](#) before following the procedures in the *Siebel Applications Administration Guide*.

This guide assumes that you have already installed, or if you are an existing customer, installed and completed the upgrade of, a Siebel Consumer Goods application. If you have not, go to the Installation/Upgrade topic of the *Siebel Bookshelf* for the guides that are relevant to your company's implementation.

The Siebel Database Server installation script creates an administrator account that can be used to perform the tasks described in this guide. For information about this process, see the *Siebel Installation Guide* for the operating system you are using and the *Siebel Deployment Planning Guide*. Also see the *Siebel System Monitoring and Diagnostics Guide* and the *Siebel System Administration Guide*.

**CAUTION:** Do not perform system administration functions on your local database because you can have serious results, such as: data conflicts, an overly large local database, or a large number of additional transactions to route.

## Siebel Consumer Goods Administrative Setup Tasks

[Table 4 on page 24](#) lists and describes the administrative setup tasks that are specific to Siebel Consumer Goods applications and tasks that might differ from those of the other Siebel Business Applications. The table also directs you to documentation that provides information about each task.

When setting up your application, use [Table 4 on page 24](#) in combination with the *Siebel Applications Administration Guide*. These tasks can be completed in any order.

Table 4. Siebel Consumer Goods Administrative Tasks

Administrative Task	Description	For More Information
Data loading and integration	Load data from other databases in your company into the Siebel database. You might also want to integrate with other database applications or perform periodic batch imports and exports of data between these applications.	<p><i>Siebel Enterprise Integration Manager Administration Guide</i></p> <p><i>Overview: Siebel Enterprise Application Integration</i></p> <p><i>Integration Platform Technologies: Siebel Enterprise Application Integration</i></p> <p><i>Transports and Interfaces: Siebel Enterprise Application Integration</i></p> <p><i>Business Processes and Rules: Siebel Enterprise Application Integration</i></p>
Define sales territories	Associate account managers with accounts. You can create this association using Enterprise Integration Manager (EIM), Siebel Territory Manager, or Siebel Assignment Manager. You can also manually enter this association.	<p><i>Siebel Installation Guide</i> for the operating system you are using.</p> <p><i>Going Live with Siebel Business Applications</i></p> <p><i>Siebel Deployment Planning Guide</i></p> <p><i>Siebel System Administration Guide</i></p>
Create periods	Customize the LOVs for periods, season periods (if applicable), and period types (if necessary).	<a href="#">"Creating Periods" on page 25</a>
Set up Siebel Workflow Policies	For customers using the Trade Promotions, Trade Funds or Sales Volume Planning modules, set up Workflow Policies.	<a href="#">"Setting Up Siebel Workflow Processes for Consumer Goods" on page 27</a>
Product administration	If data is not imported with established catalog and category hierarchies, you might need to create and manage product definitions and attributes.	<a href="#">Chapter 5, "Products"</a>
	Create catalog and category hierarchies for use with Sales Volume Planning module.	<a href="#">Chapter 7, "Sales Volume Planning"</a>



Table 4. Siebel Consumer Goods Administrative Tasks

Administrative Task	Description	For More Information
Product distribution	Create an account distribution from historical shipments by using Enterprise Integration Manager (EIM) or by using Authorized Distribution List functionality. You can also manually enter an account distribution.	<a href="#">Chapter 6, "Product Distribution"</a>
Sales Volume Planning administration	Create sales volume planning account-product hierarchy.	<a href="#">Chapter 7, "Sales Volume Planning"</a>
Corporate Promotions Administration	Create corporate promotions that you can pull from or push to account promotions.	<a href="#">Chapter 8, "Trade Promotions"</a>
Funds administration	Create fund groups to expedite creating account funds, and then allocate funds throughout a parent-child fund hierarchy.	<a href="#">Chapter 9, "Trade Funds"</a>

## Selected Setup Procedures

The following topic provides detailed setup procedures that are required for implementation for more than one module or option within the Consumer Goods product. Setup procedures that are specific to only one module are documented in the chapter describing the use of that module or option.

This topic provides instructions for the following procedures:

- ["Creating Periods" on page 25](#)
- ["Setting Up Siebel Workflow Processes for Consumer Goods" on page 27](#)

### Creating Periods

Periods appear in drop-down lists for the end users to populate the Period field in various screens. Periods are used in sales volume planning, account plans, promotions, and promoted product baselines.

For account plans and promotions, you must define the planning period, which is usually a fiscal year, but can be as short as a fiscal quarter. Because another part of the application might use calendar years, you can differentiate fiscal years from calendar years in the period name. For example, use the name FY 2007 for the 2007 fiscal year and the name Calendar 2007 for the 2007 calendar year.

The baseline periods for promoted product baselines and for sales volume planning must be the same. Thus, if you estimate promotional volumes in weeks, you must also manage the sales volume planning periods for product baselines in weeks. Managing sales volume planning periods by week rather than by month can result in significant additional administrative work and possible performance issues.

To expedite period selection, it is recommended that you include a zero in single digit periods. Some possible examples for period names follow:

- Week 01, 2007
- W01, 2007
- Month 01, 2007
- M01, 2007
- M01-Jan, 2007

**CAUTION:** Periods are sorted chronologically by their start date. Therefore, you must not create periods that have the same period type and start date.

### *To create a period*

- 1 Navigate to the Administration - Data screen > Periods view.
- 2 Create a new period definition record.
- 3 Select the value in the Type field that corresponds to the unit for time the delivery period spans (such as Week or Month).  
**NOTE:** If an appropriate value is not available in the Period Type list of values, you can create it, as described in this topic.
- 4 Select the first and last days of the delivery period in the Start date and End date fields.
- 5 Complete the necessary fields.

## Creating Values for the Period Type List of Values

The data delivered with Siebel Consumer Goods applications includes the Period Type values—Day, Week, Bi-Weekly, Month, Quarter, Half-year, Year, and Season. If you want to create periods for intervals that are not represented by these values, create a new value. For example, if you want to create half-month periods, create a Period Type value named Bi-Monthly.

The Season Period Type value is required for the creation of seasonal period records. If the Season value is inadvertently deleted from the Period Type list of values in your database, you must restore it.

### *To add values to the Period Type list of values*

- 1 Navigate to the Administration - Data screen > List of Values view.

- 2 In the Type field, query for PERIOD\_TYPE.

**NOTE:** For details about how to query from a multivalue pop-up window, see *Siebel Fundamentals*.

- 3 Select any of the Period Type records displayed by the query.
- 4 Click Menu and choose Copy Record.

The record is duplicated in the List of Values list.

- 5 Select the new record and enter a name in the Display Value field.
- 6 In the Order field, enter a number to specify the order in which the value appears in the Period Type list of values.

**NOTE:** Each Period Type record must have a unique Order value.

- 7 Complete the necessary fields.

For detailed information about administration tasks for lists of values, see the *Siebel Applications Administration Guide*.

## Setting Up Siebel Workflow Processes for Consumer Goods

Table 5 lists the Consumer Goods modules that use Siebel Workflow processes.

Table 5. Consumer Goods Modules That Use Siebel Workflow Processes

Module	Action	Name of Process
Sales Volume Planning	Automates Sales Volume Planning Action field.	CG SVP Process
Trade Promotions and Funds (considered together)	Aggregates all Paid payments and reflects changes in the status of payments by the back office.	CG Payment Process
Sales Volume Planning	Makes pricing effective in SVP.	Pricing Procedure - Default

### Process Overview

You need to perform these steps, in the order given, to set up Workflow Policies for the Sales Volume Planning module. The remaining modules do not require performing all of the steps given.

- 1 **Enable Workflow Policies.** Depending on your current implementation, you might need to import workflow processes into Siebel Workflow Manager using Siebel Tools. For information about importing workflows, see *Siebel Business Process Framework: Workflow Guide*.
- 2 **Enable Siebel Workflow Manager.** Siebel Workflow Manager must be enabled before you can begin the SVP process.

- 3 Generate triggers.** The Generate Trigger (GenTrig) component on the Siebel Server allows you to create database triggers. Policy Manager uses these database triggers to identify records that can match policy conditions. Generate Triggers needs to be regenerated when you create or delete new policies. For information about generating triggers, see the running generate triggers topic in the *Siebel Business Process Framework: Workflow Guide*.
- 4 Start Workflow Policies Agent for each applicable module.** You need to start Workflow Monitor Agent to execute your policies. Workflow Monitor Agent checks to see when the conditions of policies are met. For detailed information about starting Workflow Monitor Agent, see the *Siebel Business Process Framework: Workflow Guide*.
- 5 Test Workflow Policies Agent.**

For more detailed information about workflows, see the *Siebel Business Process Framework: Workflow Guide*.

### To set up the CG SVP Process

- 1** Activate the CG SVP Process workflow process:
  - a** Navigate to the Administration - Business Process screen > Workflow Deployment view.
  - b** In the Repository Workflow Processes list, select the CG SVP Process record.
  - c** In the Active Workflow Processes list, select the CG SVP Process record and note the Deployment Status is Active.
  - d** If the Deployment Status is not Active, make the process active by clicking Activate in the Repository Workflow Processes list.
- 2** Enable the Workflow manager:
  - a** Navigate to the Administration - Server Configuration screen > Enterprises view.
  - b** In the Component Groups list, select the record containing Workflow Management, click the menu button, and then choose Enable Component Group.
  - c** Click the Synchronize view tab.
  - d** In the Synchronize list, click Synchronize.
- 3** Generate triggers by starting server manager and entering the following commands:

```
> srvmgr /g <gateway name server> /e <enterprise name> /s <siebel server name> /u  
sadmi n /p <password >  
  
> start task for comp GenTri g wi th Pri vUser=sadmi n, Pri vUserPass=<password>, EXEC=True  
  
> list task for comp GenTri g
```

Repeat the last command until the task shows as completed.
- 4** Start the Workflow Monitor Agent by entering the following commands in server manager:

```
> start task for comp WorkMon wi th Tabl eOwner=tabl e-  
owner, Tabl eOwnPass=password, Acti onAgent=Fal se, GroupName=' CG SVP'
```

> list task for comp WorkMon

Repeat the last command until the task shows as sleeping.

For general information about workflows, see the *Siebel Business Process Framework: Workflow Guide*.



# 4

## Managing Accounts

Accounts are primarily used to represent the wholesale and retail companies to which you sell products, and the organizations and physical locations within those companies. You can also use accounts to represent your own company and competitor companies.

This chapter describes how to set up and maintain accounts and account hierarchies. Topics include:

- [“About Accounts” on page 31](#)
- [“Scenario for Setting Up and Maintaining Accounts” on page 32](#)
- [“Process of Managing Accounts” on page 33](#)
- [“Creating or Modifying Accounts” on page 34](#)
- [“Deleting Accounts” on page 37](#)
- [“Setting Up Account Hierarchies” on page 37](#)
- [“Profiling Accounts” on page 38](#)
- [“Creating Addresses for Accounts” on page 39](#)
- [“Removing Yourself from Account Teams \(End User\)” on page 39](#)
- [“Associating Activities with Accounts \(End User\)” on page 40](#)
- [“Associating Contacts with Accounts \(End User\)” on page 41](#)
- [“Adding Merchandising Locations to Accounts \(End User\)” on page 41](#)

### About Accounts

Because accounts are critical to your business efforts, maintaining complete, accurate data on your accounts is a primary task. Administrators can perform bulk loading of data on accounts, but administrators and end users can also create and modify accounts manually as needed. For accounts with multiple departments and divisions, end users can enter independent information about those subaccounts.

For more information about bulk loading account information, such as account demographic information, hierarchy, and general account attributes, see the *Siebel Enterprise Integration Manager Administration Guide*.

## About Account Hierarchies

You can manage and administer different hierarchies for different customers. For example, for a large chain of drugstores, you can establish a four-level hierarchy with the corporate headquarters office at the top level, its regional offices at the second level, its distribution centers at the third level, and its retail stores at the fourth level. For a distributor you might establish a two-level hierarchy with the distributor at the top level and the retail outlets it serves at the second level. If a company uses a third-party distributor for its products, you can associate this indirect account as well.

For detailed information about structuring organizations, see the *Siebel Applications Administration Guide*.

## About Account Classification

Accounts can be classified in many ways. Several of these standard classifications can drive specific application functionality:

- **Account type.** Classifying an account by type, such as Retailer or Distributor, can drive a dynamic profile attribute form. This form determines the profile information that is stored and displayed for the account.
- **Distribution code.** Distribution codes can be applied to accounts and products to automatically create authorized distribution lists.
- **Market segment.** Classifying an account's market segment determines the types of products that appear in that account's product catalog when creating assortment plans. You classify your customer accounts' market segment by assigning the personalization attributes Account Channel and Product Differentiator to accounts, and products or product categories or both.

For details about methods available for controlling authorized product distribution based on distribution codes or account market segment, see [Chapter 6, "Product Distribution."](#)

# Scenario for Setting Up and Maintaining Accounts

This example scenario for accounts is performed by marketing administrators, key account managers, and retail sales representatives. Your company might follow a different process according to its business requirements.

The marketing administrator for a food manufacturing company is responsible for maintaining the account-related data within the Siebel application. Generally, all of the account data is bulk loaded into the Siebel application from the food manufacturer's legacy database. However, the company has just acquired a new account, ABC Mart, and the decision has been made to manually input the information about this account directly into the Siebel application.



The administrator begins by creating account records for all of ABC Mart's headquarters offices and retail outlets. He then organizes these accounts into a hierarchy. He positions the corporate headquarters for ABC Mart at the top of the hierarchy, with regional headquarters in the middle, and retail outlets at the bottom. For each account, he then adds account profile and account contact information, and creates addresses and account assessment templates. He arranges with the database administrator to import consumer demographic information into the Siebel database, including size of household, income level, and location. Also, he can manually assign account team members or use Siebel Assignment Manager to automatically assign them, based on factors such as State, Area Code, and Type of account. He informs the new key account manager when the account information is ready.

The key account manager for ABC Mart instructs the retail sales representatives who report to her to enter activities and opportunities for each of the ABC Mart accounts for which they are responsible.

As the sales representatives interact with their contacts at the retail outlets, they enter unique information about each account, such as new contacts, addresses, assessments, best call times, store sizes, visit frequencies, or any additional demographic information. As sales territories change, representatives can remove themselves from account teams. As new representatives are hired, detailed information about accounts is available to them, based on their roles and responsibilities.

## Process of Managing Accounts

This topic lists the tasks typically performed by administrators and end users when managing accounts. Your company might follow a different process according to its business requirements.

### Administrator Procedures

The following list shows tasks administrators typically perform to manage accounts:

- 1 "Creating or Modifying Accounts" on page 34
- 2 "Deleting Accounts" on page 37
- 3 "Setting Up Account Hierarchies" on page 37
- 4 "Profiling Accounts" on page 38
- 5 Creating Account Contacts, as described in the *Siebel Applications Administration Guide*
- 6 "Creating Addresses for Accounts" on page 39
- 7 Creating Account Assessment Templates, as described in the *Siebel Applications Administration Guide*
- 8 Assigning Account Team Members

Account team members can be designated manually or automatically with the use of Siebel Assignment Manager or Siebel Territory Manager.

- For information about manually assigning account team members, see the *Siebel Applications Administration Guide*.
- For more information about using Siebel Assignment Manager, see the *Siebel Assignment Manager Administration Guide*.

### End-User Procedures

The following list shows tasks end users typically perform to access and use account information:

- [“Removing Yourself from Account Teams \(End User\)” on page 39](#)
- [“Associating Activities with Accounts \(End User\)” on page 40](#)
- [“Associating Contacts with Accounts \(End User\)” on page 41](#)
- [“Adding Merchandising Locations to Accounts \(End User\)” on page 41](#)

## Creating or Modifying Accounts

When implementing Consumer Goods application, you might decide to import account-related information from another database in your company, and avoid the need to enter this information manually. However, as you add new customers and as your existing customers add new retail outlets, you might need to create new accounts manually.

Before you create an account, find out whether you already have the account information in your database so that you do not enter information twice. To determine whether the account already exists in your database, query for values such as the company name, contact information, customer number, telephone number, or any other unique identifier.

As an administrator, you can create addresses for accounts. Later, you or end users can associate these addresses with the appropriate accounts. You can also edit existing addresses. Be careful when editing an existing address, because it changes the address for all accounts and contacts that are associated with that address.

For more information about querying your database for accounts, see *Siebel Fundamentals*.

Verifying whether an account exists can be done automatically if deduplication is active. For more information about deduplication, see the *Siebel Data Quality Administration Guide*.

This task is a step in [“Process of Managing Accounts” on page 33](#).

### ***To create an account***

- 1 Navigate to the Administration - Data screen > Account List view.
- 2 Create a new record.
- 3 Drill down on the Account field hyperlink and click the More Info view tab.

4 Complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Account Name	Name of the Account.
Account Team	List of employees who are working with this account. This list determines who can access information about the account. The primary team member can be determined by the system administrator or can be whoever created the account record.
Account Type	The type of account this is, for example, HQ, Distributor, or Retailer.  Action: Determines the account Profile form layout. The Profile form can be configured with Siebel Tools.  For more information, see <a href="#">“Profiling Accounts” on page 38</a> .
Address	An account can have multiple addresses. Click the select button to access the Account Addresses dialog box, where you can select an existing address or create a new one. Select the Primary field within the dialog box to specify the primary address.  You can edit an existing address from the Account Addresses dialog box. However, changing this address also changes every instance of the address, that is, for all the other accounts and contacts that are associated with it.
Assignment Area Code	If you use area codes in your account assignment process, enter an area code.  The Assignment Area Code value determines the area code that the Territory Assignment program uses to assign this account or subaccount.
Assignment Country Code	If you use country codes in your account assignment process, enter a country code.  The Assignment Country Code value determines the country code that the Territory Assignment program uses to assign this account or subaccount.
Buying Group	Select this check box if the account serves as a buying group for other accounts.  For more information, see <a href="#">“About Buying Groups” on page 53</a> .
Competitor	Select this check box if the account is a competitor.
Current Volume	The weekly sales dollar volume of the manufacturer’s products within the retail store.
Disable Cleansing	Select this check box to disable cleansing for the account.  For more information, see the <i>Siebel Data Quality Administration Guide</i> .
Domestic Ultimate DUNS	The D&B D-U-N-S number belonging to the highest-level family member within a specific country.

Field	Comments
DUNS #	The D&B D-U-N-S number for the account.
Global Ultimate DUNS	The D&B D-U-N-S number belonging to the account's worldwide ultimate parent account.
Industries	The type of industry the account is involved in; for example, manufacturing or service. You can enter multiple industries in this field.
Lock Assignment	Provides information for the Territory Assignment program.  If you select Lock Assignment, the account team for the account is not be changed automatically by the Territory Assignment program.
No. of Consumers	The approximate number of consumers serviced by the retail outlet.
No. of Registers	Number of cash registers for checkout at the account.
Organization	The organization of which the account is a member.
Parent	The parent account of the selected account. For more information, see <a href="#">"Setting Up Account Hierarchies" on page 37.</a>
Parent/HQ DUNS	The D&B D-U-N-S number belonging to an account's immediate headquarters or parent account.
Partner	Select this check box if the account is a partner.
Potential Volume	The potential weekly sales dollar volume of the manufacturer's products within the retail store.
Price List	Account specific price list, for example, Consumer Price List or North American Price List.
Product Differentiator	Determines the types of products that are available in the account's product catalogs.  Action: Drives visibility to account catalogs (including seasonal catalogs, if any) and products available for creating assortment plans.  For more information about controlling product distribution to accounts, see <a href="#">"About Account Market Segments" on page 52.</a>
Site	Description of the physical location or function of the account, such as "headquarters" or "corporate" or "San Francisco."
Status	The status of the account; for example, Active or Prospect.
Synonyms	A way to refer to accounts (and their sites) in the way that you prefer. For example, an account named A and B Products, Inc., might have the following synonyms: AB, A and B, and AB Products.
Visit Frequency	An integer value indicating the number of times per year a sales representative visits the account.
Weekly ACV	Weekly all-commodity volume.

## Deleting Accounts

Deleting an account completely removes the account as well as all data related to the account, such as activities, contacts, and addresses, from the system.

If you are unsure whether the account is still active (and therefore must not be deleted), contact the primary account team member and inquire before modifying or deleting the account.

You can remove yourself or others from the account team instead of deleting the record. End users can remove themselves from the account team, but they cannot delete records in the standard Consumer Goods application. Removing yourself or others from the account team removes this account from the visibility of the person no longer on the team.

As an administrator, you can delete individual accounts manually, or delete accounts in batch using Enterprise Integration Manager (EIM). For information about EIM, see the *Siebel Enterprise Integration Manager Administration Guide*.

This task is a step in [“Process of Managing Accounts” on page 33](#).

### *To delete an account*

- 1 Navigate to the Administration - Data screen > Account List view.
- 2 Select an account record.
- 3 In the Accounts/Orgs list, click Delete.

## Setting Up Account Hierarchies

For overview information about account hierarchies, see [“About Account Hierarchies” on page 32](#).

To set up account hierarchies, you create parent-child relationships between accounts. The following is a list of guidelines for creating account hierarchies:

- Accounts can have an unlimited number of child accounts.
- Accounts can have only one parent account.
- There is no limit to the number of levels you can establish within an account hierarchy.
- Accounts can be defined as Buying Groups (an attribute flag of account).
- Accounts can have an unlimited number of product categories and products associated with them.
- Each account can have only one profile (based on Account Type).
- An account can have unlimited associated assessments, and assessments can have many assessment values.

If your company uses the Sales Volume Planning module, you must create one contiguous account hierarchy with all the accounts to be included in the sales volume planning process. For instance, you might create a five-level hierarchy with your corporate headquarters at the top level and your company's divisions at the second level. You can place the accounts representing all of your customers' headquarters offices in the third level. Distribution centers can be in the fourth level and retail outlets in the fifth level.

For more information about Sales Volume Planning, see [Chapter 7, "Sales Volume Planning."](#)

This task is a step in ["Process of Managing Accounts"](#) on page 33.

### *To create an account-subaccount (parent-child) relationship*

1 Navigate to the Administration - Data screen > Account List view.

2 Verify that the parent account record exists; if it does not, create it.

For more information about creating accounts, see ["Creating or Modifying Accounts"](#) on page 34.

3 Verify that the child account record exists; if it does not, create it.

4 In the Accounts/Orgs list, select the child account record.

5 In the Account form, click the Parent Account field select button.

6 In the Pick Account dialog box, select the Parent account record, and click OK.

**NOTE:** You cannot create a new account from the Parent Account field; the account must already exist. For more information about creating accounts, see ["Creating or Modifying Accounts"](#) on page 34.

## Profiling Accounts

Account profiles maintain and display information specific to the type classification of an account. For example, an account of the type Retailer has a different profile than an account that is of the type Distributor.

This task is a step in ["Process of Managing Accounts"](#) on page 33.

### *To profile an account*

1 Navigate to the Accounts screen > Accounts List view.

2 Drill down on the Name field hyperlink for a selected account, and click the Profiles view tab.

The Profile form that appears on the Account Profile view depends on the type of account selected.

■ If the Account Type value is HQ, an HQ Profile form appears.

■ If the Account Type value is Retailer, a Retail Profile form appears.

3 In the Profile form, complete the necessary fields.

## Creating Addresses for Accounts

You can create addresses for accounts. Later, end users can associate these addresses with the appropriate accounts. You can also edit existing addresses. Be careful when editing an existing address, because it changes the addresses for all accounts and contacts that are associated with that address.

These tasks are a step in [“Process of Managing Accounts” on page 33](#).

### *To create an address for an account*

- 1 Navigate to the Administration - Data screen > Addresses view.
- 2 In the Address form, create a new record, and complete the necessary fields.

### *To associate an address with an account*

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Select an account record.
- 3 In the Account form, click the Address field select button.
- 4 In the Account Addresses dialog box, query to find an address record in the list, or click New to create additional addresses from which to choose.

## Removing Yourself from Account Teams (End User)

Unlike administrators, end users cannot delete accounts. If end users need to remove an account from their My Accounts view, they must remove themselves from the account team.

### *To remove yourself as an account team member*

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Select an account record.
- 3 In the Account Team field, click the select button, move the row containing your name from the Selected column to the Available column, and click OK.

The change is reflected the next time you log in to the application.

## Associating Activities with Accounts (End User)

Siebel applications allow end users to record many types of activities for a variety of reasons. One of the reasons to record an activity is to be reminded to do something regarding an account. For instance, an end user might want to make note of a meeting with a contact at an account.

In the Account Activities view, end users can:

- Create new activities.
- View all activities for an account.
- Modify existing activities.
- Drill down on any individual activity to view additional information.
- Chart activities completed for an account.

This task is a step in [“Process of Managing Accounts” on page 33](#).

### *To create an activity for your account*

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Drill down on the Name field hyperlink for a selected account.
- 3 In the Activities list, create a new activity record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Description	Description of the activity.
Activity	<p>High-level description of activity as provided by an administrator. Provides hyperlink to Activity Attachment view.</p> <p>In the standard Siebel Consumer Goods applications, this field is General, by default, and is not updatable.</p> <p>However, the behavior of this field can be modified or the field can be removed with Siebel Tools.</p>
Type	<p>The specific type of activity to be performed, chosen from a drop-down list. Provides hyperlink to Visit Execution view.</p> <p>Action: Type chosen drives the dynamic drilldown to specific views.</p>
Employees	<p>Click the select button to assign employees to the activity from the Employees list.</p> <p>Depending on the type of activity created, this record now appears on this person's My Activities calendar or to-do list.</p>
Status	Current status of the activity, chosen from a drop-down list.



For more information about activities and managing your calendar, see *Siebel Fundamentals*.

## Associating Contacts with Accounts (End User)

End users can associate contacts with accounts. This task is a step in [“Process of Managing Accounts” on page 33](#).

### *To associate contacts with accounts*

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Drill down on the Name field hyperlink for a selected account, and click the Contacts view tab.

In the Accounts Contacts view tab, you can:

- Create new contacts
- View all contacts for an account
- Modify existing contacts
- Drill down on any individual contact’s name to create activities for that contact and account

**NOTE:** Before creating a new contact be sure that the contact does not already exist by querying the All Contacts view. If the contact does not exist, you can enter a new contact from either the All Accounts View or the All Contacts view, and associate the contact with the appropriate account. For more information about querying, see *Siebel Fundamentals*.

For the procedure about creating and modifying contact information, see the *Siebel Applications Administration Guide*.

## Adding Merchandising Locations to Accounts (End User)

You can add merchandising locations to accounts. Merchandising locations are physical locations where products can exist, such as one or more display locations in a retail outlet, or in a bin in a warehouse. Adding merchandising locations to accounts allows you to associate products with physical locations and perform merchandising audits.

This task is a step in [“Process of Managing Accounts” on page 33](#).

### *To add a merchandising location to an account*

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Drill down on the Name field hyperlink for a selected account, and click the Merchandising Location view tab.

- 3 In the Merchandising Locations list, create a new record, and complete the necessary fields. Some fields are described in the following table.

Field	Comments
Asset Name	A product the customer owns, typically acquired through contract or purchase. For consumer goods companies, this is typically a type of merchandising or display unit.
Asset Number	Automatically populated upon selection of asset in Asset field.
Location Order	Specifies the order in which the products or merchandising locations appear, to facilitate retail audits. An example is side-by-side. The person performing the retail audit then knows the exact location of each individual product.
Type	The type of merchandising location. Values include Bin, Aisle, Shelf, Trunk, Virtual, and Warehouse.

**Related Topics**

[“Associating Account Products with Merchandising Locations \(End User\)” on page 65](#)

[“Performing Merchandising Audits” on page 202](#)

# 5

## Products

This chapter highlights the procedures necessary to manage and use product and pricing information structures (catalogs, categories and products) and describes how to access information about a product. Topics include:

- [“About Catalog and Product Administration for Consumer Goods” on page 43](#)
- [“About Catalog Category Hierarchies” on page 43](#)
- [“Scenario for Setting Up and Managing Products” on page 44](#)
- [“Process of Managing Products” on page 45](#)
- [“Defining Products” on page 46](#)
- [“Defining Product Lines” on page 48](#)
- [“Using the Product Explorer \(End User\)” on page 49](#)

### About Catalog and Product Administration for Consumer Goods

The Catalog administration and Product administration screens and associated views that appear in Siebel Consumer Goods share much of the functionality found in Siebel Business Applications. This chapter focuses on the catalog and product administration functionality that is unique to the Siebel Consumer Goods application.

For details about controlling product distribution, see [Chapter 6, “Product Distribution.”](#)

For information about setting up and maintaining customizable products (products that can be interactively configured), see the *Siebel Product Administration Guide*.

### About Catalog Category Hierarchies

A product catalog is a collection of products arranged in a logical hierarchy of categories, according to your company’s business needs.

Figure 1 shows a schematic of a sample catalog-category hierarchy with the catalog at the root level. The catalog is parent to three categories, which are parents of more subcategories or of products.

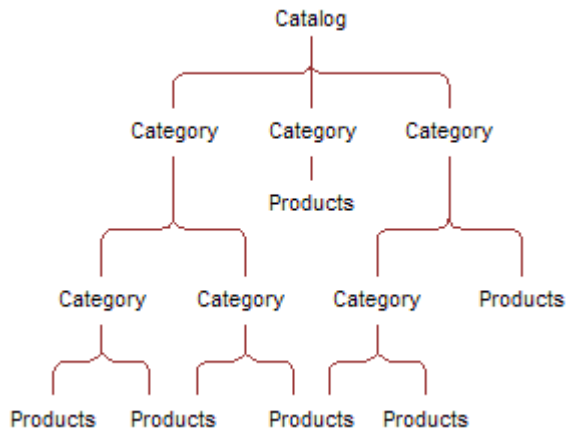


Figure 1. Product Catalog Hierarchy

Product catalogs are organized by creating categories and structuring the categories and subcategories into parent-child relationships to form a catalog category hierarchy. Products are then added to categories. For example, the parent category, Beverages, can contain the Ace Splash Refrigerated Juice subcategory, which contains all the Ace Splash brand refrigerated juice drink products. The Beverages category can also contain a subcategory for a different brand of beverages, Big Wave. When conducting a promotional campaign for a company’s line of beverages, you can use the category or subcategory definition, such as Big Wave, to be sure that only those associated products are included or are available to be included in the promotion.

For the purpose of using the Sales Volume Planning (SVP) module however, a category-subcategory hierarchy must be contiguous with only one designated SVP parent (root) category. For information about setting up category product hierarchies for SVP, see [“Setting Up a Category-Product Hierarchy” on page 74](#).

## Scenario for Setting Up and Managing Products

This scenario is an example of the process a marketing administrator and a customer service representative might follow in managing products. Your company might follow a different process according to its business requirements.

The marketing administrator for a beverage and vending machines manufacturing company is setting up and managing the company's products. The administrator sets up two catalogs for the company, Beverages and Vending Machines. He adds product categories and subcategories to each catalog, structured according to the business needs of his company. He then adds products and product details such as features, comparison features, and marketing literature. He creates product lines, and then associates products to product lines. Finally, the administrator creates different price lists for various geographic locations, currencies, and customers.

A customer service representative from your company receives a call from a customer in California who is interested in one of your company's vending machines. By navigating through the Siebel application, the representative is able to describe the product's key features and component products. During the conversation, the customer expresses an interest in features that are available in a higher-end model. Immediately, the representative can give the customer a feature-by-feature comparison of the two models and quote prices from the California price list. The representative can then follow up by sending the customer more detailed information, such as product brochures, through email or fax.

The service representative can also navigate through the Beverages catalog in helping the customer decide what to stock in the vending machine.

## Process of Managing Products

This topic describes sample tasks often performed by marketing administrators and customer service representatives when managing products. Your company might follow a different process according to its business requirements.

### Administrator Procedures

The following list shows procedures administrators typically perform to manage products.

**1** [Setting Up a Catalog](#), as described in the *Siebel Order Management Guide*

In Siebel Consumer Goods applications, the Account Channel personalization attribute can be applied to product categories, as well as to products and accounts. For information about using the Account Channel field, see [Chapter 6, "Product Distribution."](#) In the standard Siebel Consumer Goods applications, the Account Channel field is not visible for catalogs. To enable this personalization attribute for catalogs, see *Using Siebel Tools*.

For information about setting up category product hierarchies specifically for the Sales Volume Planning (SVP) module, see ["\(Optional\) Modifying the SVP Business Service" on page 100.](#)

**2** ["Defining Products" on page 46](#)

**3** [Providing Greater Detail to Product Records](#), as described in the *Siebel Product Administration Guide*

You can create product features, assign key features to a product, define product attributes and associate them with product classes, define related products, designate equivalent products, create comparison features for equivalent products, create product entitlements, associate literature with products and associate images with products.

**4** ["Defining Product Lines" on page 48](#)

**5 Creating and managing price lists, as described** in the *Siebel Pricing Administration Guide*

**NOTE:** With the ENTERPRISE\_FLG set to N, the default setting, Database Extract extracts only organization Price Lists and Items specific to each organization. You can use Siebel Enterprise Integration Manager (EIM) to import Price Lists and Price List Items by organization. If EIM sets the ENTERPRISE\_FLG to Y, all Price Lists and associated Price List Items are routed to all users regardless of organization. For more information, see the *Siebel Enterprise Integration Manager Administration Guide*.

### End-User Procedures

Most of the tasks associated with products and price lists involve viewing information. An administrator is responsible for setting up product lines, products, and price lists.

The following list shows tasks you typically perform when working with Products. These tasks can be performed in any order.

- [“Using the Product Explorer \(End User\)” on page 49](#)
- Viewing Product Information and Associating Attachments with Products, as described in *Siebel Fundamentals*
- Viewing and Comparing Product Key Features and Viewing Product Image, as described in the *Siebel Applications Administration Guide*

## Defining Products

Use the Administration - Product screen to enter products into the Siebel database by creating product records. The only required field in the product record is the product name. However, it is recommended that you also associate the record with a product line, category, and price list.

In the standard Siebel Consumer Goods application, after a product record is created it cannot be deleted. To prevent a product record from being displayed in drop-down lists and dialog boxes, edit the product record by deselecting Orderable, Sales Product and Service Product check boxes. You can also control display of the product by setting Effective Start and Effective End dates.

Your company might also choose to configure the application to allow administrators to delete products, or to delete products as part of the batch Enterprise Integration Management (EIM) process, or both. For more information about EIM processes, see the *Siebel Enterprise Integration Manager Administration Guide*.

This task is a step in [“Process of Managing Products” on page 45](#).

### *To create a product record*

- 1 Navigate to the Administration - Product screen.
- 2 Create a new product record.

3 Complete the necessary fields.

Some fields in the Products list are described in the following table.

Field	Comments
Billable Flag	Check this box if the product you are defining is billable.
Bundle	Check this box if you are defining a product bundle.
Category	Select the category to which the product belongs.
Customizable	Check this box if the product can be customized.
Equivalent(s)	The names of your equivalent products. The names you enter determine which products are compared in the Product Comparison list on the Product Details view. This field supports multiple values.
Lead Time	The standard lead time for ordering the product.
Level	Optional indicator of products in relation to each other.
Market	Select the market the product is targeted at.
Name	The name of the product. This is a hyperlink to Product Detail Key Features Administration View by default.
Organization	Allows you to associate a product with an organization, and limit who can see it.
Product Line	The product line with which the product is associated.  For information about creating product lines and associating products with product lines, see <a href="#">"Defining Product Lines" on page 48</a> .
Qty	Enter the number of items in the unit of measure. For example, if the unit of measure is a case, Qty is the number of items in the case, such as 24.
Report Header	Enter the name you want to use as the report header for this product.
Resource	Select this check box if the product is a service for a project. This determines if the product is available in the rate list.
Revision	Describes the version or revision of a product, and can be used in association with an internal employee position for routing request related to the product. For example, for Product "X" Version 7, service requests are initially assigned to the product line manager for Product "X."
Sales Product	Indicates whether or not the product is a sales product. Specifies whether the product can be sold. If this flag is not checked, the product does not show up on the product drop-down list.
Ship Carrier	Allows users to predefine a preferred carrier for a product.
Shipping Via	Allows users to predefine a preferred shipping method for a product.

Field	Comments
Type	The type classification of the product.  To configure your own Types, see the <i>Configuring Siebel Business Applications</i> . Action: Drives the dynamic Detail Product Form.
U/M	Unit of measure. The measure by which the product is sold.
Units/Case	The value to multiply by the actual cases shipped to get standard or statistical cases shipped. Different products are compared using equivalent cases.

**NOTE:** To view competitor products, for example in conducting retail audits, the competitor products must be present in the distribution list of the account. Only administrators can add competitor products to an end user's distribution list. End users responsible for account audits can then associate competitor products with the account they plan to audit. For information about conducting retail audits, see [Chapter 12, "Retail Execution."](#)

- 4 To view all the fields for a product, drill down on the Name field in the Product Administration view, and click the first More Info link in the More Info link bar.

For descriptions of additional fields that can be made visible using Siebel Tools, see the *Siebel Product Administration Guide*.

## Defining Product Lines

Product lines are logical groupings of products. When you define a product line, you name it and then specify all the products in that particular line. If you have products that are already defined, you can associate them with the product line. You can assign product line managers.

This task is a step in ["Process of Managing Products"](#) on page 45.

### *To create a product line*

- 1 Navigate to the Administration - Product screen > Product Lines view.



- In the Product Lines list, create a new record, and complete the necessary fields.  
Some fields are described in the following table.

Field	Comments
Product Line	The name of the product line to which products belong.
Product Line Manager	The name of the product line managers.
Products	The products associated with the product line. You can add or delete a product from a product line and a product can belong to more than one product line.  A product must exist before it can be associated with a product line.

**NOTE:** When you create a new product on the Products list view, you can add it to an existing product line by specifying a value in the Product Line field of the Product record.

## Using the Product Explorer (End User)

Explorer views in Siebel applications display information in a hierarchical, multipane format. The Product Explorer view has an explorer tree on the left, with folders arranged hierarchically, and a list on the right, representing the contents of the selected folder.

This task is a step in [“Process of Managing Products”](#) on page 45.

### *To use the Product Explorer*

- Navigate to the Products screen.
- Select a product record.
- Drill down on the Name field hyperlink for the selected product, and click the Explorer view tab.
- In the Explorer tree, find the page icon of the product for which you want information.  
**NOTE:** If the tree contains more products than are visible when you have scrolled down to the end, click the arrow at the bottom of the tree to display more.
- Click the plus sign next to the page icon of the product to expand the item and reveal its contents.
- Click the folder icons to view related Products, Attachments, Components, Price List, and Literature.

Available records appear as hyperlinks in the list to the right of the Explorer tree.

For more information about using Explorer views in Siebel applications, see *Siebel Fundamentals*.



# 6

## Product Distribution

This chapter describes how to use Siebel Consumer Goods to manage all aspects of product distribution. Topics include:

- [“About Controlling Product Distribution” on page 51](#)
- [“Scenarios for Managing Product Distribution” on page 53](#)
- [“Process of Managing Product Distribution” on page 54](#)
- [“About Creating and Modifying Distribution Lists” on page 55](#)
- [“Setting Up Account Channel Values” on page 60](#)
- [“Assigning Product Categories to Account Catalogs” on page 60](#)
- [“Viewing and Modifying Distribution List Products \(End User\)” on page 61](#)
- [“Reviewing Account Catalogs \(End User\)” on page 62](#)
- [“Creating Buying Groups \(End User\)” on page 63](#)
- [“Associating Account Products with Merchandising Locations \(End User\)” on page 65](#)
- [“About Product Distribution Configuration” on page 66](#)

**NOTE:** For information specific to product distribution and its relationship to Sales Volume Planning functionality, see [Chapter 7, “Sales Volume Planning.”](#)

### About Controlling Product Distribution

Distributing the right products to the right account is a key challenge for many companies. The Siebel Consumer Goods application allows you to structure and track the distribution of a wide range of products to large numbers of accounts. In addition, you can control where the product is held within an account's premises.

Your company can control product distribution in the following ways:

- **Managing distribution lists to automate product distribution.** By assigning distribution codes to categories, products, and accounts within a customer's product distribution account hierarchy, you build a distribution system that determines which products are distributed to each account. For more overview information about distribution lists, see [“About Distribution Lists” on page 52.](#)
- **Classifying accounts by market segment.** Classifying an account's market segment automates the product distribution process by controlling the products (or product categories) that are displayed in that account's product catalog. You classify your customer accounts' market segments by applying the personalization attribute Account Channel for each account.

For more overview information about account market segments, see [“About Account Market Segments” on page 52.](#)

- **Assigning product categories to an account.** Administrators or end users can manually assign specific product categories to specific accounts, so that only products in those categories are available for distribution.
- **Creating buying groups.** Buying groups are accounts that act as product distributors, or suppliers, to their multiple member accounts. For more overview information about buying groups, see [“About Buying Groups” on page 53](#).
- **Designating merchandising locations.** You can assign multiple merchandising locations to an account.

## About Distribution Lists

Most consumer goods companies are organized in a hierarchical structure, often based on the company's channels of distribution. Typically, marketing administrators create product distribution lists that control the company products that are available for distribution to their customer distributor accounts and the retail outlets they serve.

The Siebel Consumer Goods application can use distribution codes to automatically create an account-product record, which is a *distribution list* of the products that each account (within the product distribution account hierarchy) is authorized to receive. Distribution codes can be applied to the appropriate level of the product distribution account hierarchy for each of your customers, usually to the customer's distribution centers and to the outlets they serve, and to any or all of the products that your company manufactures. Each subaccount receives either the full set or a subset of products authorized for the key distributor accounts directly above that subaccount in the hierarchy.

Most consumer goods companies use one or both of the following distribution methods to supply their retail outlets:

- **Direct distribution.** With this distribution method, the key account, usually the customer's own distribution center, is the sole intermediary between your company and the retail outlets.
- **Indirect distribution.** With this distribution method, there is another intermediary such as a third-party distributor, called an indirect account, between the key account and the retail outlets.

Your company's products are authorized for retail distribution at the key account, indirect account, and retail outlet levels. This is called retail product authorization. With indirect distribution, distribution lists are built from the products available to the indirect account, which form a subset of the products from the key account distribution list.

For more information about creating distribution lists to control product distribution to accounts, see [“About Creating and Modifying Distribution Lists” on page 55](#).

## About Account Market Segments

If you have multiple channel partners operating in the same locale, such as a shopping mall, you might want them to carry different sets of products to avoid unnecessary price reductions that ultimately erode the brand equity of your products. Companies in this situation determine the product mix that an account carries based on the market segment of the account.

With the Siebel Consumer Goods application, you can use the Account Channel attribute to selectively display an account catalog with only the product categories and products that fit the account's market segment.

Administrators or key account managers can tag your company's accounts with the Account Channel attribute which determines the type of distribution to which channel the account belongs, such as Mass Merchandiser, or Electronics Specialists.

## About Buying Groups

A buying group is an account (consisting of multiple member accounts) created to buy products at high volume, typically for the purpose of receiving discounted prices. All stores in a buying group can benefit by receiving products at prices lower than they would receive if they were purchasing independently.

Specific products can be associated with a buying group to determine the products available for distribution to the group members. Buying groups can purchase products on behalf of their member accounts. End users can check to see if their buying group has already planned to purchase some of the products they require and, if it has, they can drop those products from the plan and eliminate double ordering.

# Scenarios for Managing Product Distribution

This topic outlines example processes performed by marketing administrators and key account managers in using distribution hierarchies and the Account Channel personalization attribute to determine how their products are distributed among their accounts. Your company might follow a different process according to its business requirements.

## Product Distribution and Distribution Lists

The administrator at a large beverage manufacturing company is responsible for making sure that the right products are available for each customer account. He does so by controlling product distribution lists at the corporate level. These lists determine the set of products available at the key distribution account level of each account's hierarchy, and the subsets of products available to the accounts down the hierarchy. In addition, the administrator determines where various products are displayed within retail outlets.

The Ace Corporation account consists of two warehouse distribution centers, Ace Corporation East and Ace Corporation West. Each warehouse supplies retail outlets throughout North America. Ace Corporation headquarters determines which beverage items are stocked at each warehouse. In addition, Ace Corporation employs a third-party wholesaler, AnyCompany Distribution, to supply products to outlets within the state of Louisiana, in the United States.

The administrator enters the Ace Corporation account hierarchy for product distribution into the Siebel database. He includes the details that the Ace Corporation East and West accounts are Distributors and that AnyCompany Distribution is a wholesaler or supplier account for one or more of the Ace Corporation accounts in its product distribution account hierarchy.

He then establishes an authorized product distribution list for the Ace Corporation account product distribution hierarchy that is based on the inclusive distribution option. Both of Ace Corporation's distribution warehouses (Ace Corporation East and West) are given a distribution code of Premium for the category Fizz and a distribution code of Standard for the category Splash. This designation authorizes both warehouses to receive all of his company's beverage products that are part of the Fizz category, independent of product category, and all products in the Splash category that have a distribution code of Standard or Limited. However, because Louisiana bans the sale of alcoholic fruit drinks, the third-party wholesaler in Louisiana is not licensed to distribute them. The administrator gives the wholesaler a distribution code of Limited for the category Fizz, so that only the subset of his company's products that do not contain alcoholic fruit drinks gets shipped to this warehouse.

The key account manager is responsible for managing and updating the authorized product distribution lists, supplier references and source of supply for each of her key accounts. She notes that Ace Corporation East cannot meet the demand for beverage products for all the retail outlets it supplies, so she fulfills those outlets' needs by designating Ace Corporation West as the alternative supplier for those outlets in the account hierarchy for product distribution.

Finally, the key account manager specifies what percentage of the authorized product distribution list each warehouse supplies and designates merchandising locations for several of the products that are available to Ace Corporation's outlets.

# Process of Managing Product Distribution

This topic details sample tasks often performed by administrators and end users when managing product distribution. Your company might follow a different process according to its business requirements.

## Administrator Procedures

This topic lists the tasks administrators typically perform to manage product distribution:

- 1 ["Creating Distribution Codes" on page 56](#)
- 2 ["Creating a Distribution List" on page 57](#) or ["Amending a Distribution List" on page 59](#)
- 3 ["Deleting Products from a Key Account Distribution List" on page 58](#)
- 4 ["Setting Up Account Channel Values" on page 60](#)
- 5 ["Assigning Product Categories to Account Catalogs" on page 60](#)

## End-User Procedures

This topic lists the tasks end users typically perform to manage product distribution:

After distribution lists have been created, the other tasks involved in product distribution can be performed in any order. However, specifying suppliers for products can be done only after buying groups have been created, because the suppliers are selected from the existing buying groups.

- 1 “Viewing and Modifying Distribution List Products (End User)” on page 61
- 2 “Reviewing Account Catalogs (End User)” on page 62
- 3 “Reviewing Account Catalogs (End User)” on page 62
- 4 “Creating Buying Groups (End User)” on page 63
- 5 “Associating Account Products with Merchandising Locations (End User)” on page 65

## About Creating and Modifying Distribution Lists

Typically, marketing administrators create distribution lists that control the company products that are distributed to a customer’s distributor accounts and the retail outlets they serve.

Creating a distribution list involves the following tasks:

- “Creating Distribution Codes” on page 56
- “Creating a Distribution List” on page 57

Before creating a distribution list for a customer, you must create the appropriate distribution codes. Distribution codes impose a logic on the distribution of products across the account-category hierarchy that is either inclusive or exclusive. In both systems, the distribution codes govern how products move from key accounts to subaccounts.

For information about creating accounts and account hierarchies, see [Chapter 4, “Managing Accounts.”](#)

For each product you add to the key account’s distribution list, an account-product record is automatically created. The distribution code you enter for each product on the key account’s distribution list is matched with the distribution codes given to each subsidiary account.

With inclusive distribution, the sequence or *order* which is assigned to a group of distribution codes in the list of values (LOV), is used to assign rank to accounts. For example, outlets might have different distribution codes within the Beverages category. The distribution codes and the order that is assigned to those codes in an inclusive system are shown in [Table 6](#).

Table 6. Distribution Codes, Order, and Products in an Inclusive System

Distribution Code	Order	Subaccount Receives:
Premium	1	Premium, Standard, Limited
Standard	2	Standard, Limited
Limited	3	Limited

In an inclusive distribution system, subaccounts with the distribution code Premium receive the entire key account's list of beverages, that is, products with distribution codes Premium, Standard, or Limited. Outlets with the distribution code Standard receive a subset of the entire list, which includes products with Standard and Limited distribution codes. Outlets with the distribution code Limited receive only those products with the distribution code of Limited.

With exclusive distribution, each distribution code defines a specific subset of products that is independent of the order assigned to the distribution codes. [Table 7](#) shows an example of distribution codes and products that might be found in an exclusive distribution system.

Table 7. Distribution Codes and Products in an Exclusive System

Distribution Code	Order	Subaccount Receives
Premium	1	Premium
Standard	2	Standard
Limited	3	Limited

In an exclusive distribution system, outlets with the distribution code Premium in the category Beverages receive a subset of the key account's distribution list of products, which includes products that are part of the Premium category with distribution codes Premium. Outlets with the distribution code Standard for the category Beverages receive a subset of the entire list, which includes only those products with the distribution code of Standard in the Beverages category. Outlets with the distribution code Limited in the category Beverages receive only the products with the distribution code of Limited in the Beverages category.

You can also add unauthorized products to subaccount distribution lists. An *unauthorized product* is a product that is added to a subaccount's distribution list outside the inclusive or exclusive distribution system.

## Creating Distribution Codes

Before you can create a distribution list, you must first define the distribution codes you want to use.

This task is a step in ["Process of Managing Product Distribution"](#) on page 54.

### *To set up distribution codes*

- 1 Navigate to the Administration - Data screen > List of Values view.
- 2 In the List of Values screen, query for the Type field RTL\_PRFL\_DIST\_CODE.  
The query results show all the account distribution codes that are created.
- 3 In the Order column, assign a different number to each distribution code to create a sequence.

**NOTE:** The sequence that is applied to this LOV determines the order in which the distribution codes appear on the Dist. Code list. The sequence does not impose organization, but applies a rank in an inclusive distribution system.



## Creating a Distribution List

After you have defined distribution codes, you can create a distribution list for a key account and specify the subaccounts of the key account. You can then define the products you want to include in the key account's distribution list.

This task is a step in ["Process of Managing Product Distribution"](#) on page 54.

### *To create an account distribution list and define subaccounts*

- 1 Navigate to the Administration - Authorized Distribution List screen.
- 2 Select the account record for which you want to create an account distribution list by performing a query in the list.
 

**NOTE:** For direct distribution, this key account represents a key distribution point for the customer, such as a distribution warehouse. For indirect distribution, it is the key account responsible for indirect distribution, such as a third-party distributor.
- 3 (Optional) Drill down on the Name field hyperlink, click the More Info view tab, and select the Inclusive check box to assign inclusive distribution properties.
- 4 Navigate to the Administration - Authorized Distribution List screen > Detail List view.
- 5 Select the same account record as in [Step 2](#).
- 6 Click the Authorized Accounts view tab.
- 7 In the Authorized Accounts list, click New.
- 8 In the Account field, click the select button, and in the Pick Account dialog box, select an account record to add as a subaccount to this key account, and click OK.
- 9 Complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Account Channel	Determines which type of distribution channel to which the account belongs.
Dist. Code	Distribution Code. Determines the products that this account receives.
Category	Determines the category of products this account receives.

**NOTE:** You can create multiple records for one subaccount. Each record for the same subaccount must have a different category, but each category can have a different distribution code.

After you have specified the subaccounts to include in the authorized distribution list, you can define the products available to these accounts.

### *To define products for an account distribution list*

- 1 Navigate to the Administration - Authorized Distribution List screen > Detail List view.

- 2 Select an account record for which you intend to define products.
- 3 Click the Authorized Category Products view tab, and click Category.
- 4 In the Select Category dialog box, query for a product category to add to this account's distribution list, and click OK.

All products in the selected category appear in the Authorized Category Products list, and the Categories list displays the category of the selected product.

- 5 To include a product in the distribution list for the account, select the product in the Authorized Category Products list, then specify the distribution code for that product in the Categories list.

If the Inclusive check box is selected for the key account, do not create more than one product-category record for the same product and category. With inclusive distribution, product-category records for the same product and category but with different distribution codes have contradictory meaning. Also, these records can result in error messages when you apply distribution code updates to the subaccounts for the key account.

If you do not want to include a product in the distribution list for the account, select the product in the Authorized Category Products list, and then select the Skip check box in the Categories list.

- 6 (Optional) Click New in the Authorized Category Products list to add a new product without a category.
- 7 In the Authorized Category Products list, click Apply to propagate the key account's distribution list to the subaccounts that are associated with this account.
- 8 Repeat [Step 5](#) through [Step 7](#) for each additional product you want to add to the account's distribution list.
- 9 Click the Authorized Distribution List view tab.

All the subaccounts are listed with the categories and products that have been assigned to them.

**NOTE:** To view competitor products, for example in conducting retail audits, the competitor products must be present in the distribution list of the account. Only administrators can add competitor products to an end user's products list. End users responsible for account audits can then associate competitor products with the account they plan to audit.

## Deleting Products from a Key Account Distribution List

After you have created a distribution list for an account, you can delete products from the distribution list of the key account and its subaccounts.

This task is a step in ["Process of Managing Product Distribution"](#) on page 54.

### *To delete a product from a key account distribution list*

- 1 Navigate to the Administration - Authorized Distribution List screen > Detail List view.
- 2 In the Accounts list, select the account record for which you want to delete a product.
- 3 Click the Authorized Category Products view tab, and query for the product you want to delete.

- 4 Click Delete and the product is deleted from the key accounts distribution list.
- 5 Click Apply.

The product is also deleted from the subaccounts distribution list if the key account is the only supplier of the deleted product.

## Amending a Distribution List

You can amend the distribution list created for a key account. For example, you can:

- Add an additional product category to a distribution list.
- Change the details of a product on a distribution list, for example, the distribution code, account code, sequence code and whether or not the product is included in the distribution list.

This task is a step in [“Process of Managing Product Distribution” on page 54](#).

### *To add a product category to an account distribution list*

- 1 Navigate to the Administration - Authorized Distribution List screen > Detail List view.
- 2 Select the key account record you want to amend.
- 3 Click the Authorized Category Products view tab, and click Category.
- 4 In the Select Category dialog box, query for a product category to add to this account's distribution list, and click OK.

All products in the selected category appear in the Authorized Category Products list.

- 5 For each product, specify an account code and sequence code on the Authorized Category Products list and a distribution code on the Categories list.
- 6 Click Apply.

The products in the product category are added to the distribution list of the key account and its subaccounts.

### *To amend product details on an account distribution list*

- 1 Navigate to the Administration - Authorized Distribution List screen > Detail List view.
- 2 Select the account record you want to amend.
- 3 Click the Authorized Category Products view tab.
- 4 Select the product you want to amend.

Amend the appropriate fields in the Authorized Category Products list (Seq. code, Account Code) or the Categories list (Dist. code, Skip check box) as necessary.

- 5 Click Apply.

The changes you have made are applied to the key account and its subaccounts.

## Setting Up Account Channel Values

To make effective use of the Account channel personalization attribute, administrators or end users must select values for the Account Channel field for each of your company's accounts that is included on an authorized distribution list. The Account Channel field determines the type of distribution channel to which the account belongs.

To assign Account Channel personalization attributes to accounts, see [“Creating a Distribution List” on page 57](#).

**NOTE:** If no values are selected for the account channel field, its value is recognized as null. Accounts with null Account Channel values are matched with product categories and products that have null values in those fields.

Predefined values for the Account Channel attribute are included in the data for the standard Siebel Consumer Goods application under the list of values (LOV) type ACCOUNT\_CHANNEL. You can create new values or change any of the existing values, which are:

- Apparel Specialty
- Athletic Specialty
- Sporting Goods
- Department Store
- Grocery
- Mass Merchandiser
- Military
- Pet
- Warehouse Club
- Convenience Store
- Dollar
- Drug
- Electronics Speciality

For the procedure to create or change a value in the LOV, see the *Siebel Applications Administration Guide*.

This task is a step in [“Process of Managing Product Distribution” on page 54](#).

## Assigning Product Categories to Account Catalogs

The product categories and products available for inclusion in an account's catalog can be controlled by using the Account Channel personalization attribute and rules, as described in [“About Account Market Segments” on page 52](#).

At times, however, an administrator might want to override the personalization rule to further refine the products or product categories that are available to an account. In this case, the administrator assigns exactly the categories of products available for inclusion in an account's catalog in the Account Categories view.

**NOTE:** If you assign one or more categories to an account through the Account Category view, only those categories are available for inclusion in the account's catalog. No categories are available based on personalization rules; the rules are instead overridden by your category assignments.

This task is a step in ["Process of Managing Product Distribution"](#) on page 54.

#### *To assign categories to an account*

- 1 Navigate to the Administration - Catalog screen > Account Categories view.
- 2 In the Accounts list, select an account record.
- 3 In the Categories list, click New.
- 4 In the Add Category dialog box, select the category or categories to be added, and click OK.

## Viewing and Modifying Distribution List Products (End User)

End users can view the products on an account's distribution list, add unauthorized products to a subaccount's distribution list, and modify an account's distribution list.

This task is a step in ["Process of Managing Product Distribution"](#) on page 54.

#### *To view an account's distribution list products*

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Drill down on the Name field hyperlink for a selected account, and click the Distribution view tab.  
The product distribution list for that account appears.

**NOTE:** In the standard Siebel Consumer Goods application, you can add additional products to this account's distribution list from the Distribution view.

#### *To add unauthorized products to an account's distribution list*

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Drill down on the Name field hyperlink for a selected account, and click the Source of Supply view tab.

The products on the account's distribution list are listed on the Products list.

- 3 In the Products list, click New.
- 4 In the Product field, click the select button.

- 5 From the Pick Product dialog box, select a product record to add to the account's distribution list, and click OK.
- 6 Complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Dist. Code	Distribution Code. This determines the products that this account receives.
Account Code	Retailers use this code to identify the product.
Seq. Code	Sequence Code. This specifies the aisle on which the product appears in the display sequence at the outlet.

**NOTE:** A product that is manually added to a subaccount's distribution list is unaffected by changes made at the key account level.

### *To modify a key account's distribution list*

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Select the key account record for the customer's distribution list.
- 3 Drill down on the Name field hyperlink, and click the Source of Supply view tab.  
The Products and Source of Supply lists appear.
- 4 Modify the Products list as necessary.

You can:

- Add new products to the Products list.
- Alter the sequence code.
- Assign the product a status of active or inactive.
- Change the distribution code.

## Reviewing Account Catalogs (End User)

*Account catalogs* contain detailed information about the categories and products your company has made available to be ordered by a specific account.

If you are an account manager with responsibility for creating quotes and orders, you will find account catalogs to be a valuable resource in providing information about the products that are available. You can review catalogs in preparation for a visit or telephone call with an account's buyer. If you use the Siebel Consumer Goods application on a laptop computer, you can display the catalogs as you meet with buyers, allowing them to view prices and other critical information about your company's products for upcoming seasons.

This task is a step in ["Process of Managing Product Distribution"](#) on page 54.

***To review an account catalog***

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Drill down on the Name field hyperlink for a selected account, and click the Account Catalogs view tab.  
A list of catalogs for the account you selected appears in the Account Catalogs list.
- 3 In the Account Catalogs list, drill down on the Name field hyperlink.  
The More Info view for the catalog appears.
- 4 In the Catalogs list, drill down on the Name field hyperlink a second time.  
The Categories view for the catalog appears. The Categories list displays the categories of the chosen catalog and the Category Details form displays the highest-level category.
- 5 In the Categories link bar, click the Products link.  
The Categories Products view appears.  
You can review:
  - The category hierarchy in the Categories list.
  - Product details, by clicking on the product name hyperlink.

## Creating Buying Groups (End User)

A buying group account acts as a product distributor, or supplier, for its multiple member accounts.

To create buying groups, complete the following tasks.

- 1 Create a buying group account, or designate an existing account as a buying group.
- 2 Associate member accounts with the buying group account.
- 3 Associate products with the buying group.
- 4 (Optional) Associate specific buying group member accounts with specific buying group products.

This task is a step in [“Process of Managing Product Distribution” on page 54](#).

***To create a buying group***

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Create a new buying group account record, or select an existing account record.  
For information about creating accounts, see [Chapter 4, “Managing Accounts.”](#)
- 3 Drill down on the Name field hyperlink and click the More Info view tab.
- 4 In the More Info form, select the Buying Group check box.  
The Account Attribute Flag is now Buying Group, and member accounts can be added to this buying group.

### *To associate member accounts with a buying group*

- 1 Navigate to the Groups screen > Buying Group List view.
- 2 From the visibility filter, select Buying Group Accounts.  
The Buying Groups Accounts form and the Accounts list appear.
- 3 From the Buying Groups Accounts form, query to select the appropriate buying group record.  
The accounts that are already members of that buying group appear in the Accounts list.
- 4 In the Accounts list, click New.
- 5 From the Add Accounts dialog box, select the account or account records you want to designate as members of the buying group, and click OK.

### *To associate products with a buying group*

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Select a buying group account record.
- 3 Drill down on the Name field hyperlink, and click the Source of Supply view tab.  
The Products and Source of Supply lists for the account appear.
- 4 In the Products list, click New.
- 5 Click the Product select button.
- 6 From the Pick Product dialog box, select the product you want to add, and click OK.
- 7 Repeat [Step 4](#) through [Step 6](#) for each product you want to add.

## Associating Sources of Supply with a Product (End User)

You can specify sources of supply for the products on a distribution list. You can associate multiple sources of supply with a single authorized product. This association helps key account managers understand the distribution patterns of supply for the various accounts and buying groups.

### *To associate sources of supply with a product*

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Drill down on the Name field hyperlink for a selected account, and click the Source of Supply view tab.
- 3 Highlight the products for which you want to designate a source of supply in the Products list.
- 4 In the Source of Supply list, create a new record, and complete the necessary fields.
- 5 Click the Buying Group select button.  
The Pick Account Suppliers dialog box appears.



- 6 In the Pick Account Suppliers dialog box, select the supplier you want to associate with the product, and click OK.
- 7 Complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Percentage	The percentage of the total product order that is coming from the particular supplier.
Primary Flag	Check this field if you want the supplier to be the primary source.
Site	The location of the buying group.

## Associating Account Products with Merchandising Locations (End User)

By associating an account's authorized product with merchandising locations, you can assign a specific physical location for that product, such as one or more display locations within a retail outlet, or within a bin in a warehouse. A product can have multiple merchandising locations.

This task is a step in ["Process of Managing Product Distribution"](#) on page 54.

### *To associate products with account merchandising locations*

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Drill down on the Name field hyperlink for a selected account, and click the Merchandising Location view tab.
- 3 From the Merchandising Locations list, choose the appropriate merchandising location record.
- 4 In the Product list, click New.
- 5 In the Account Product dialog box, select the products to add to the merchandising location, and click OK.
- 6 Repeat [Step 3](#) through [Step 5](#) until you have added all the products you want to add to the merchandising location.

### **Related Topics**

["Adding Merchandising Locations to Accounts \(End User\)"](#) on page 41

["Performing Merchandising Audits"](#) on page 202

# About Product Distribution Configuration

This topic contains information that might be useful to configurators making changes to the product distribution features.

The procedures documented in this chapter can include one or more buttons that invoke specialized methods, as described in [Table 8](#).

Table 8. Buttons and Methods for Product Distribution Configuration

Button	Name of Method	Description	Supported On
Apply	OnAssignProductToSubaccount	Changes the ADL status of a selected account to Pending then triggers a run time event to carry out the Apply task. On the Authorized Category Products view, the Apply task applies all authorized products and categories of the selected key distributor account down to its subaccounts in accordance with either inclusive or exclusive logic.	Bus Comp Layer
Category	ShowPopup	Brings up a dialog box of categories.	Applet Layer
OK	AddCategoryProducts	Adds the category and the products associated with it to the parent account.	Applet Layer
Delete	DeleteSelected	Marks the selected S_ORG_PROD and S_ORG_DIST_LST records in the Authorized Products view for deletion from the parent account and its subaccounts. Triggers the business service SIA CS ADL Delete Business Service, which in turn calls the DeleteExtra method. The DeleteExtra method deletes the marked S_ORG_PROD and S_ORG_DIST_LST records.	Applet Layer

## Apply Button for an Authorized Distribution List

The Apply button, which is used to propagate product distribution lists to accounts based on distribution codes that are defined in an authorized distribution list, ceases to function if certain out-of-the-box parameter settings are changed. In particular:

- For version 7.5, in the Account business component, the ADL Status field must have the Force Active property set to TRUE.
- For version 7.7 or later, in the SIS Account Entry applet, the ForceActive control user property must be set to Y.



# 7

## Sales Volume Planning

This chapter describes how to set up and perform sales volume planning (SVP). Topics include:

- [“About Sales Volume Planning \(SVP\)” on page 69](#)
- [“Scenario for Using SVP” on page 72](#)
- [“Process of Sales Volume Planning” on page 73](#)
- [“Setting Up a Category-Product Hierarchy” on page 74](#)
- [“Defining the SVP Hierarchy” on page 77](#)
- [“About the SVP Aggregate Action Process” on page 80](#)
- [“Populating Locks” on page 84](#)
- [“Establishing a Baseline Basis Quantity” on page 84](#)
- [“Copying Baseline Information to Additional Fields” on page 89](#)
- [“Manually Entering SVP Data” on page 91](#)
- [“Performing Ongoing SVP Administration Tasks” on page 91](#)
- [“About SVP Data \(End User\)” on page 94](#)
- [“Viewing SVP Data \(End User\)” on page 94](#)
- [“Skipping SVP Source Data \(End User\)” on page 95](#)
- [“Locking and Modifying SVP Data \(End User\)” on page 96](#)
- [“About Category and Account Level Allocation \(End User\)” on page 98](#)
- [“Number Handling and SVP Actions and Percentage-Basis Calculation” on page 99](#)
- [“About Configuring Siebel Consumer Goods for SVP” on page 99](#)

### About Sales Volume Planning (SVP)

Sales volume planning (SVP) is an iterative process by which consumer goods manufacturers model the projected sales for an upcoming period. Companies capture and update salesperson-influenced data pertaining to the quantity or value of product that will be purchased by their customers during a given period of time.

**NOTE:** This chapter uses the term quantity to represent any amount in SVP. You can also use a monetary amount, such as currency, in SVP. However, you cannot execute SVP using quantity and monetary amounts at the same time.

Companies use SVP as part of their annual forecasting process based on the following data:

- Baseline
- Incremental
- Target
- Shipment
- Consumption

These data sets make the SVP process possible and provide feedback, in the form of baseline and target quantities, for current and future sales volume plans. This data can be developed internally or supplied by a third party. See [Table 9 on page 70](#) for definitions and possible sources of these data sets.

**NOTE:** It is recommended that companies perform complex trending and data modification on the initial load of historical records, such as shipment history, *before* importing this data into Siebel base tables.

Table 9. SVP Data Sets

Data Set	Definition	Possible Sources
Baseline	The amount of volume that would have been sold in the absence of a promotional event.	<ul style="list-style-type: none"> <li>■ Shipments to accounts information</li> <li>■ Customer warehouse withdrawal information provided by a customer to the manufacturer or from a third-party data source</li> </ul>
Incremental	The amount of volume sold over and above baseline that can be attributed to a promotional event.	<ul style="list-style-type: none"> <li>■ Derived by calculating the difference between customer warehouse withdrawals, or shipments, and baseline</li> <li>■ Provided by a third-party data source</li> <li>■ Precalculated by incorporating lift matrices or using an educated estimation</li> </ul>
Target (Also referred to as quota or objective)	The amount of volume a manufacturer expects its sales force to sell in a given period.	<ul style="list-style-type: none"> <li>■ Based on shipment, baseline, or consumption data from a prior period</li> <li>■ Modification of data based on a factor such as a growth or decline rate expected for the upcoming period</li> </ul>
Shipment	The amount of product shipped to customers.	<ul style="list-style-type: none"> <li>■ Almost always stored in, and imported from, an order processing system or customer data warehouse</li> </ul>
Consumption	The amount of product purchased and used by consumers.	<ul style="list-style-type: none"> <li>■ Usually provided by a third-party data source</li> <li>■ Can be derived by using customer warehouse withdrawals as a proxy</li> </ul>

**Related Topics**

[“About Basis, Baseline Planning, and Baseline Data Elements” on page 71](#)

[“About SVP Data \(End User\)” on page 94](#)

## About Basis, Baseline Planning, and Baseline Data Elements

The SVP module supports a three-step baseline and target planning process. The Baseline Basis (or Target Basis) fields are filled in by data previously imported or copied into the sales volume plan. These read-only fields are intended to serve as the basis data for the planning process.

The SVP process promotes this data into Baseline Planning (or Target Planning) values, which are then released to sales planners or account managers for adjustment. Sales planners and account managers make their adjustments based on known elements that impact trends for the period or periods being planned.

After these modifications are made, the values are promoted into the Baseline (or Target) fields where they are also used as the promotion baseline. Your company can choose to employ some or all of these elements in its planning process.

## About Buttons and Methods Used in SVP

SVP procedures include buttons that invoke specialized methods, as described in [Table 10 on page 71](#).

Table 10. Buttons And Methods For SVP Configuration

Button	Method	Description	Supported On
Allocate	MthdAlloc	Changes status of allocate action to Pending, ready to be picked up by Workflow Monitor.	Bus Comp Layer
Calculate Source	OnCalculate	Sums up total value of Source field specified between Start and End fields.	Bus Comp Layer
Execute	MassChange	Finds all Baseline or Target records with period between Period Start and Period End, then updates the field specified with Value according to the Algorithm Type. For Percentage Change, the new value is (1 plus <i>Value</i> divided by 100) multiplied by <i>old value</i> ; for Flat Change, the new value is <i>Value</i> .	Applet Layer

Table 10. Buttons And Methods For SVP Configuration

Button	Method	Description	Supported On
Execute Action	OnExecute	Changes status of actions from Initialized to Pending, ready to be picked up by Workflow Monitor.	Bus Comp Layer
Export to File	CreatePopup	Exports selected columns from the SVP screen to an Excel spreadsheet.	Applet Layer
Load from File	LoadFromFileInBusComp	Imports selected columns an Excel spreadsheet to the SVP screen.	Applet Layer
Lock	mthdlock	Locks a node and makes it modifiable.	Bus Comp Layer
Mass Change	ShowPopup	Opens a dialog box that displays the following options: <ul style="list-style-type: none"> <li>■ Algorithm type</li> <li>■ Field</li> <li>■ Value</li> <li>■ Period Start</li> <li>■ Period End</li> </ul> The dialog box also contains the Execute button.	Applet Layer
Refresh	OnRefresh	Refreshes the form and recalculates planning percentages.	Bus Comp Layer
Skip All	SetAll	Sets Skip flag to True.	Bus Comp Layer
SVP Adopt	mthdAdoptSVPParent	Adopts categories in a hierarchy and makes them a part of the SVP category hierarchy.	Bus Comp Layer
Unlock	mthdUnlock	Unlocks a node and makes it impossible for a user to modify the node.	Bus Comp Layer

## Scenario for Using SVP

This topic gives one example of how SVP might be used. You can use SVP in different ways, depending on your business model.



An SVP administrator for a large beverage manufacturer knows that her company is entering its annual planning period as of September. To generate SVP, she must perform several tasks. First, she must identify the source for planning sales volume data. This source might be shipment or consumption data from previous periods. After it is identified, this data needs to be reviewed to determine its relevancy for future SVP periods. As a result of the review, the SVP administrator chooses to skip certain account-product periods because there are discontinued products or inactive accounts that need to be considered.

Next, she uses the data to establish a baseline for all products and accounts over the specified planning periods. She has the option of modifying the data directly or using it as a basis for populating the baseline planning field. In this case, the SVP administrator chooses to copy the values into the baseline planning field for the same period and, while doing so, she uses the percentage change algorithm to increase the number by 5%. Now that the baseline planning column is populated, the SVP administrator alerts the senior managers and region managers that they can manually adjust the figures.

With this data now available, the senior managers modify it and allocate these changes down the account-category-product hierarchy. The SVP administrator then alerts the subordinate managers and key account managers that the data is available.

The key account managers then modify the baseline data based on their knowledge of their local accounts and markets. They use this information to plan trade promotions for these accounts, and they enter the incremental volume that they anticipate as a result of these promotions. Finally, at the end of the planning cycle, the SVP administrator reaggregates the baseline and incremental data and exports it to a demand planning tool to be used in the consensus forecasting.

## Process of Sales Volume Planning

This topic lists the tasks typically performed by administrators and end users in order to successfully execute the SVP process. Your company might follow a different process according to its business requirements.

### Administrator Procedures

The following list shows tasks administrators typically perform to execute sales volume planning.

- 1 ["Setting Up a Category-Product Hierarchy" on page 74](#)
- 2 ["Defining the SVP Hierarchy" on page 77](#)
- 3 ["Performing the Initial Aggregation" on page 81](#)
- 4 ["Populating Locks" on page 84](#)
- 5 ["Establishing a Baseline Basis Quantity" on page 84](#)
- 6 ["Copying Baseline Information to Additional Fields" on page 89](#)
- 7 ["Manually Entering SVP Data" on page 91](#)
- 8 ["Performing Ongoing SVP Administration Tasks" on page 91](#)

### End-User Procedures

The following list shows tasks end users typically perform to execute sales volume planning.

- 1 "Viewing SVP Data (End User)" on page 94
- 2 "Skipping SVP Source Data (End User)" on page 95
- 3 "Locking and Modifying SVP Data (End User)" on page 96

## Setting Up a Category-Product Hierarchy

To set up a category-product hierarchy, perform the following tasks:

- "Setting Up the Account Hierarchy" on page 74
- "Creating a Category-Product Hierarchy" on page 74
- "Associating Products with Categories" on page 75
- "Acquiring Categories" on page 76
- "Deleting Products and Categories" on page 77

This task is a step in "Process of Sales Volume Planning" on page 73.

### Setting Up the Account Hierarchy

You must establish an account hierarchy in which every account in the hierarchy has a parent account except the root account (highest-level account in an account hierarchy). Organizational entities that are part of sales volume plans must exist in this SVP account hierarchy. For instructions about setting up account hierarchies, see "Setting Up Account Hierarchies" on page 37.

### Creating a Category-Product Hierarchy

You must establish an explicit category-product hierarchy before beginning the SVP process. Categories and products in SVP must have a single designated SVP parent category.

This task is a step in "Process of Sales Volume Planning" on page 73.

#### *To create a category-product hierarchy*

- 1 Navigate to the Administration - Catalog screen > SVP Categories view.

- 2 In the All Categories list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Category Name	The name of the category in the category-product hierarchy.
Parent SVP Category Name	The parent SVP name of the category (for example, All Products). This field is filled automatically in when category-subcategory relationships are established later.
SVP Level	The SVP level of the category. This field is filled automatically in when an association to a subcategory is made.
Description	A description of the category-product hierarchy.
Effective Start Date	The starting date and time of the category.
Effective End Date	The ending date and time of the category.
Catalog Name	The name of the catalog associated with this category-product hierarchy.

Repeat [Step 2](#) until all categories are specified.

- 3 In the All Categories list, select the root category, and drill down on the Category Name field hyperlink.

The SVP Category Details view appears.

- 4 In the Subcategories list, add the subcategory or subcategories for which you want to designate the parent category as its SVP parent.

**NOTE:** It is possible for many subcategories to be designated SVP adoptees for the SVP parent. However, if a subcategory already has another category as its SVP parent, this designation ends the previous SVP parent relationship and creates a new one.

## Associating Products with Categories

After establishing your multiple-category hierarchy, you associate products with each of the appropriate categories. Associate only products at the lowest level of the category hierarchy.

This task is a step in [“Setting Up a Category-Product Hierarchy”](#) on page 74.

**CAUTION:** Even though adding products to the upper levels of the category hierarchy is possible, it is not a recommended activity and is not enforced during SVP actions.

### *To associate products with categories*

- 1 Navigate to the Administration - Catalog screen > SVP Categories view.

- 2 Drill down on the Category Name field hyperlink for a selected category.  
The SVP Category Details view appears.
- 3 In the Subcategories list, drill down on the Name field hyperlink until you reach the lowest level subcategory.
- 4 In the Products list, create a new record.
- 5 In the Add Internal Products dialog box, choose a product or products, and click Add.
- 6 In the Products list, select the product or products for which you want to designate an SVP parent category.
- 7 Click SVP Adopt.

The SVP Adoptee field of the selected product is automatically filled in with a check mark. This product now has the selected parent category as its SVP parent. The other products in the Products list, for which the SVP Adoptee field is cleared, are not active products for the parent category. They do not appear in sales volume plans for the parent category.

**NOTE:** If products to category links are created through other methods (that is, externally to the Siebel application), then you need to perform an Acquire Categories action to create the associations. See [“Acquiring Categories” on page 76](#) for more details.

## Acquiring Categories

Associating products with categories creates the links required by the Siebel application to enable the Allocation process. If you choose to make these associations through another method (that is, external to the Siebel application), you need to perform an Acquire Categories action to establish these links. You must perform this action when changes are made to the category-product hierarchy.

This task is a step in [“Setting Up a Category-Product Hierarchy” on page 74](#).

### *To perform the Acquire Categories action*

- 1 Navigate to the Administration - Sales Volume Planning screen.
- 2 Click the Other Actions view tab.
- 3 In the Other Actions form, create a new record.
- 4 From the Action field drop-down list, select Acquire Categories.
- 5 Fill in the Description field. For example, Fall Forecast - Acquire Categories.
- 6 Click Execute Action.

In the SVP Action list, the status of Pending appears in the Status field. After the categories are acquired, the Status field changes to Complete and a dialog box appears, confirming that the action was successful.

### Related Topic

[“Associating Products with Categories” on page 75](#)

## Deleting Products and Categories

When deleting products, you must first unadopt the product. Similarly, when deleting a category, first unadopt all products associated with that category.

**CAUTION:** If you do not delete products and categories using the method described here, then the Acquire Categories action must be run to make sure that the Allocation functionality works correctly within the new hierarchy. The Acquire Categories action can also be run to synchronize the category-product hierarchy when inconsistencies have been introduced through error. Failing to keep this hierarchy synchronized adversely affects the Allocation process and functionality.

This task is a step in [“Setting Up a Category-Product Hierarchy”](#) on page 74.

### *To unadopt a product*

- 1 Navigate to the Administration - Catalog screen > SVP Categories view.
- 2 Drill down on the Category Name field hyperlink for a selected category.
- 3 In the Subcategories list, drill down on the Name field hyperlink until you reach the lowest level subcategory.
- 4 In the Products list, select the product or products you want to delete.
- 5 Click SVP Adopt.

Clicking the button removes the check mark in the SVP Adoptee field of the selected product. This product is no longer active for the parent category in SVP functions.

### Related Topic

[“Acquiring Categories”](#) on page 76

## Defining the SVP Hierarchy

Connecting the account hierarchy with the category-product hierarchy establishes the SVP hierarchy, also known as the account-product tree. You can connect these hierarchies by associating accounts in the account hierarchy with the categories in the category-product hierarchy.

**CAUTION:** Make sure the account hierarchy is explicit and contiguous, with every account in the hierarchy having a parent account except the root account. All organizational entities that are part of sales volume plans must exist in this SVP account hierarchy.

Several methods can be used to make these associations, and you can use a combination of them to define your SVP hierarchy:

- Manually associating categories and subcategories with accounts, as described in this topic.
- Modifying and deleting account-category hierarchies, as described in this topic.
- Importing the associations with the data from a back-office system.

- Automatically making associations in the hierarchy by running Aggregate, as described in [“Performing the Initial Aggregation” on page 81](#).

**CAUTION:** Running Aggregate can save you time from manually establishing associations between every account and category-product hierarchy. However, the Aggregate action aggregates sales volume data, which can take a long time to complete. Therefore, if you rely on Aggregate to create these associations, import the SVP data *before* running Aggregate.

This task is a step in [“Process of Sales Volume Planning” on page 73](#).

### Manually Associating Categories with Accounts

You can manually associate categories with accounts. This task is a step in [“Defining the SVP Hierarchy” on page 77](#).

#### *To manually associate a category with accounts*

- 1 Navigate to the Administration - Catalog screen > SVP Categories view.
- 2 Drill down on the Category Name field hyperlink for a selected category.  
The SVP Category Details form appears.
- 3 From the visibility filter, select SVP Category Accounts.
- 4 Scroll down to the Accounts list and create a new account record.
- 5 In the Pick Account dialog box, select the accounts you want to add to the category, and then click Add.

### Manually Associating Subcategories with Accounts

You can manually associate subcategories with accounts. This task is a step in [“Defining the SVP Hierarchy” on page 77](#).

#### *To manually associate a subcategory with accounts*

- 1 Navigate to the Administration - Catalog screen > SVP Categories view.
- 2 In the All Categories list, select the subcategory you want to associate with accounts.
- 3 Click the Category Name hyperlink for the subcategory.  
The SVP Category Details view appears.
- 4 From the visibility filter, select SVP Category Accounts.
- 5 Scroll down to the Accounts list and create a new account record.
- 6 In the Pick Account dialog box, select the accounts you want to associate with the subcategory, and then click Add.

## Modifying Account-Category Hierarchies

You can modify account-category hierarchies to reflect changes to accounts and categories within your organization. An account-category hierarchy is modified when a parent-child account relationship is changed. Changes to a parent-child account relationship can be performed by designating a new or different parent account for a given account record. This change is enforced when the SVP Aggregate action is performed. You can make these changes from one of the Sales Volume Planning views or through the general Data Administration views for Accounts.

This task is a step in [“Defining the SVP Hierarchy” on page 77](#).

### *To modify an account-category hierarchy*

- 1 Navigate to the Administration - Catalog screen > SVP Categories view.
- 2 In the All Categories list, select a category record.
- 3 From the visibility filter, select SVP Category Accounts.
- 4 Scroll down to the Accounts list, select an account record, and modify the Parent Account field.

**NOTE:** When changing an account hierarchy structure for use with SVP, administrators must perform the Aggregate action. Special consideration must be taken if the hierarchy change affects a parent account in such a way that it no longer has an associated subaccount.

### Related Topic

[“Performing the Initial Aggregation” on page 81](#)

## Deleting Account-Category Hierarchies

You can delete an account-category association by removing the account from the SVP Category Accounts view. After making this change, the Aggregate process must be performed. For information about the Aggregate process, see [“Performing the Initial Aggregation” on page 81](#).

This task is a step in [“Defining the SVP Hierarchy” on page 77](#).

### *To delete an account-category hierarchy*

- 1 Navigate to the Administration - Catalog screen > SVP Categories view.
- 2 In the All Categories list, select a category record.
- 3 From the visibility filter, select SVP Category Accounts.
- 4 Scroll down to the Accounts list, select an account record, and delete it.

## About the SVP Aggregate Action Process

SVP is the process of modeling projected sales of a product at one or more accounts within an upcoming period of time. Companies establish sales volume plans to forecast or plan the quantity of products they will sell to these accounts during the SVP period. The SVP Aggregate process models this complex account-category-product-period hierarchy and allows for the allocation and aggregation of data through this hierarchy.

The SVP Aggregate action uses the account-category links created by an administrator to construct the account-category-product hierarchy, and associates the imported source data with the appropriate SVP nodes. SVP nodes create records that represent the combination of accounts and category-products.

The SVP Aggregate action is an ongoing SVP task. Each time the action is run after the initial Aggregate action, a search is performed down the established account-category-product-period hierarchy structure and any new or missing nodes are created. The data is then reaggregated up through the account-category-product-period hierarchy.

Executing the SVP Aggregate action is a resource-intensive task, as it is dependent upon the complexities of your account-category-product-period hierarchy, as well as your source data set. The appropriate planning of this process is a key component to using the SVP module.

**NOTE:** The SVP Aggregate action does not aggregate across period types, so data changes made to data stored in weeks does not aggregate up into the monthly periods, nor do changes made at the annual level allocate down throughout the periods that make up the year. Data can be aggregated, however, through the use of Oracle Business Intelligence for reporting purposes. It is recommended that data be stored in the standard periods of either weeks or months.

### Maximizing Aggregation Performance

The Aggregate action is the most resource-intensive action in the SVP module. To maximize performance, run Aggregate for select period ranges only. Also, keep the intervals small and run Aggregate only as frequently as dictated by your business requirements. For example, if you are storing volume data by week, it is recommended that you run the aggregation at the end of each week, and then only for the week just completed.

**NOTE:** Running Aggregate for the first time creates a large amount of transaction records. It is recommended that you perform this function in an environment that allows optimum performance.

#### *To maximize aggregation performance*

- 1 Make sure that the Siebel database is configured according to the *Siebel Installation Guide* for the operating system you are using.
- 2 Switch off transaction logging during Aggregate.
- 3 Reextract all mobile clients. See the *Siebel Remote and Replication Manager Administration Guide* for details.

#### Related Topic

["Performing the Initial Aggregation" on page 81](#)



## Performing the Initial Aggregation

The SVP Aggregate action executes and builds the account-category relationships defined earlier in the physical database. After this process is complete, SVP users can navigate the associated account-category hierarchy to understand or change periodic product movement data.

You can specify that the Aggregate action aggregate baseline data and roll up incremental volume from any level of the hierarchy across the entire account-category-product hierarchy. You can also choose to aggregate particular source fields (such as incremental volume) rather than the entire source table.

The SVP Aggregate action must be run independently for each product movement table: baseline, target, consumption, and shipment. For example, a planning administrator who wants to establish targets and a baseline basis must run the Aggregate action twice; once to establish the targets and a second time to establish a baseline basis. You use the same SVP hierarchy when performing the Aggregate action for targets and a baseline basis. The Aggregate action fails if the product movement tables do not contain data.

**NOTE:** Before performing aggregation, make sure that products are associated with their respective account's authorized product distribution list. For more information, see ["About Creating and Modifying Distribution Lists"](#) on page 55.

This task is a step in ["Process of Sales Volume Planning"](#) on page 73.

### To perform an aggregation

- 1 Navigate to the Administration - Sales Volume Planning screen.
- 2 In the Aggregate view, create a new record.
- 3 From the Action field drop-down list, select Aggregate.
- 4 Complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Description	The name of the sales volume plan.
Source Table	The complete data set (baseline, shipment, consumption, or target) that you want to aggregate. Select a source table if you want to aggregate the entire data set.
Source Field	The subset of data that you want to aggregate (for example, incremental quantity or shipped quantity). Select a source field if you want to limit the aggregation to a specific column of SVP data.
Start Period	The starting period of the source field or table.
End Period	The ending period of the source field or table.
Starting Account Level	The level of the hierarchy from which you want to begin the aggregation. If left blank, aggregation starts at the lowest level of the account hierarchy.

5 Click Execute Action.

In the SVP Action list, the status of Pending appears in the Status field.

**NOTE:** If you are preparing sales volume data for multiple periods and want to track the progress of the action, click the Sub Actions tab to view the status of the periods as they are processed.

After the aggregation is built, the Status field changes to Complete and a dialog box appears, confirming that the action was successful.

### Related Topics

[“\(Optional\) Process of Running Aggregation Processing in Parallel” on page 82](#)

## (Optional) Process of Running Aggregation Processing in Parallel

You can expedite aggregation processing by running parallel SVP Aggregate actions.

**NOTE:** Each Siebel Server must have the Workflow Process Manager component enabled. For information about enabling components on a Siebel Server, see the *Siebel System Administration Guide*.

To facilitate parallel processing, you must partition your aggregation into multiple aggregation actions. For example, if you want to aggregate Consumption data for the first 12 weeks of the year, instead of creating a single 12-week SVP Aggregate action record, you create four Aggregate action records of three weeks each.

After you create the aggregation actions, the actions can be run in parallel, either as multiple tasks on one server or as tasks on several servers.

To set up parallel aggregation processing, perform the following tasks:

- 1 Make sure Siebel Workflow Manager has been started. For more information, see [“Setting Up Siebel Workflow Processes for Consumer Goods” on page 27](#).
- 2 Enable the Workflow Process Manager component on each Siebel Server. For information about enabling components on a Siebel Server, see the *Siebel System Administration Guide*.
- 3 Start the Workflow Monitor Agent on each Siebel Server. For more information, see *Siebel Business Process Framework: Workflow Guide*.

**NOTE:** To run multiple aggregation processes in parallel, each process needs a Workflow Monitor Agent. For example, if you want to run five processes in parallel, you need to start five Workflow Monitor Agents. Similarly, if you want to run  $n$  parallel processes on a single server, you need to start  $n$  Workflow Monitor Agents on that single server.

- 4 Modify the CG SVP Action business component to enable the Mass Invoke button. For more information, see [“Modifying the CG SVP Action Business Component” on page 83](#).
- 5 Set up and run parallel SVP Aggregate actions from either a single-server or multiple-server environment. For more information, see [“Performing Parallel Aggregation Processing” on page 83](#).

## Modifying the CG SVP Action Business Component

To enable the Mass Invoke button, which is needed for parallel processing, you must modify the CG SVP Action business component. If you do not modify the CG SVP Action business component as described in the following procedure, you cannot use the Mass Invoke button.

This task is a step in "[\(Optional\) Process of Running Aggregation Processing in Parallel](#)" on page 82.

### *To modify the CG SVP Action business component*

- 1 Launch Siebel Tools.
- 2 Modify the CG SVP Action business component as follows:
  - User Prop = Generate Account Category
  - Value = False

## Performing Parallel Aggregation Processing

Before beginning this procedure, confirm that the AOM parameters for the eConsumer Object Manager (ENU) are as follows:

Minimum MT Servers =  $n$  plus 1

Maximum MT Servers =  $n$  plus 1

(Where  $n$  is the number of servers you are using.)

**CAUTION:** If you are configuring parallel SVP processing for the first time, you might want to use [Workflow Simulator](#) to test the following procedures before using [Workflow Monitor Agent](#). For more information about [Workflow Simulator](#), see [Siebel Business Process Framework: Workflow Guide](#).

This task is a step in "[\(Optional\) Process of Running Aggregation Processing in Parallel](#)" on page 82.

### *To perform parallel aggregation processing*

- 1 Log in to the Siebel Consumer Goods application, navigate to the Administration - Sales Volume Planning screen, and then click the Other Actions view tab.
- 2 Create an SVP Populate Locks action and click the Execute Action button.  
This unlocks all records, making them available for aggregation.
- 3 Create an SVP Acquire Categories action and click the Execute Action button.  
This creates account category records for each combination of accounts and categories.
- 4 Determine how you want to break up the aggregation into subperiods.
- 5 Following the instructions described in "[Performing the Initial Aggregation](#)" on page 81, create and execute an SVP Aggregate action record for each subperiod aggregation.
- 6 For each Siebel Server running Consumer Goods that you want to use to process this aggregation, log in and launch a new instance of the Consumer Goods application Web client.
- 7 On each client, navigate to the Administration - Sales Volume Planning screen.

- 8 From the Aggregate view tab, click Mass Invoke.  
Repeat this step for each client.
- 9 Close each client.
- 10 To monitor the progress of your parallel aggregations, launch a new instance of the Consumer Goods application Web client and navigate to the Administration - Sales Volume Planning screen.  
The SVP Action list displays the status of each Aggregate action. Make sure that at least two Aggregate actions have a status of Executing at the same time, because this condition confirms that the processing is occurring in parallel.

## Populating Locks

After building an SVP hierarchy, you populate the hierarchy's locks. Populating locks protects data from being edited by multiple users simultaneously and allows remote editing of forecast data.

**NOTE:** Until you populate the locks, SVP data is not visible to end users.

Locks are populated at the account level. This prevents users at lower account levels from overwriting modifications made by higher account level users.

This task is a step in ["Process of Sales Volume Planning" on page 73](#).

### *To populate SVP hierarchy locks*

- 1 Navigate to the Administration - Sales Volume Planning screen.
- 2 Click the Other Actions view tab.
- 3 In the Other Actions form, create a new record.
- 4 From the Action field drop-down list, select Populate Locks, and then fill in the Description field.
- 5 Click Execute Action.

In the SVP Action list, the status of Pending appears in the Status field. After the locks in the hierarchy are populated, the Status field changes to Complete and a dialog box appears, confirming that the action was successful.

### Related Topic

["Locking and Modifying SVP Data \(End User\)" on page 96](#)

## Establishing a Baseline Basis Quantity

After importing the SVP data, you copy it to the Baseline Basis Quantity field. Typically, your first step in creating a baseline is generating a baseline basis quantity. A *baseline basis quantity* is generated from imported SVP source data and represents the preadjusted amount of volume that would have been sold in the absence of promotional events.

This topic includes the following topics:

- [“Generating Baseline Basis Quantities for Existing Products” on page 85](#)
- [“Generating Baseline Basis Quantities for New Products” on page 86](#)
- [“Precalculating an Adjusted Baseline Basis Quantity” on page 87](#)

This task is a step in [“Process of Sales Volume Planning” on page 73](#).

## Generating Baseline Basis Quantities for Existing Products

For existing products, you can use shipments or consumption data from an earlier period or baseline data from a demand planning tool as the source for generating a baseline basis. After determining the source of the baseline basis, for example historical shipments, you copy these records to the baseline basis quantity.

### *To generate a baseline basis quantity for an existing product*

- 1 Navigate to the Administration - Sales Volume Planning screen.
- 2 Click the Copy Actions view tab.
- 3 In the Copy Actions form, create a new record.
- 4 From the Action field drop-down list, select Copy Field.
- 5 In the Account field, select the highest level account structure; for example, All Accounts or Company HQ.
- 6 Fill in the rest of the fields in the form. Some fields are described in the following table.

Field	Comments
Algorithm	The algorithm; for example, Percentage Change or Trended Volume-Period. For more information about algorithms, see <a href="#">“About SVP Algorithms” on page 88</a> .
Category	The root category in the category-product hierarchy. Fill in either the Category field or the Source Product field. You must fill in the Account field <i>before</i> filling in either the Category field or Source Product field.
Include Skipped	Select this field to include skipped account-product periods.
Description	The name of the sales volume plan; for example, Fall Baseline Basis Quantity.
%Change	The percentage change from the source field to the target field. You must select Percentage Change in the Algorithm field to perform this action.
Source End Period	The ending period of the source field.
Source Field	The source field of the baseline basis; for example, Shipped Quantity or Consumed Quantity.

Field	Comments
Source Product	The product in the category-product hierarchy.
Source Start Period	The starting period of the source field.
Target End Period	The ending period of the target field.
Target Field	The target field of the baseline basis; for example, Baseline Basis Quantity or Baseline Basis Currency.
Target Start Period	The starting period of the target field.

**7** Click Execute Action.

In the SVP Action list, the status of Pending appears in the Status field.

**NOTE:** If you are preparing sales volume data for multiple periods and want to track the progress of the action, click the Sub Actions tab to view the status of the periods as they are processed.

After the fields are copied, the Status field changes to Complete and a dialog box appears, confirming that the action was successful. On the Sales Volume Planning screen, the Basis Quantity field in the Category Baseline list is now filled in for this product.

#### Related Topics

[“Generating Baseline Basis Quantities for New Products” on page 86](#)

[“Precalculating an Adjusted Baseline Basis Quantity” on page 87](#)

## Generating Baseline Basis Quantities for New Products

For new products, you can copy baseline shipment or consumption data from a similar existing product as the source for generating a baseline basis. After determining the source of the baseline basis; for example, historical shipments of a similar product, you copy these records to the new product’s baseline basis quantity.

### *To generate a baseline basis quantity for a new product*

- 1 Navigate to the Administration - Sales Volume Planning screen.
- 2 Click the Copy Actions view tab.
- 3 In the Copy Actions form, create a new record.
- 4 From the Action field drop-down list, select Copy Product.

**NOTE:** If you want to copy information between products, the products must be part of the same account. If products are part of the same account hierarchy but at different level accounts, product information cannot be copied from an existing product to a new product.

- 5 Select the Apply ADL check box if you want to create records for only the accounts that have already been added to the new products ADL:

- If there is no ADL established for the new product or you want to sell the new product to the same as accounts the source product was sold, leave this check box blank.
- If you selected the Apply ADL check box, the Default Value becomes available and you can enter a value to give account managers a starting point for those ADL accounts that did not buy or receive the source product.

Complete the rest of the fields in the form. The available fields are described in [Step 6 of “Generating Baseline Basis Quantities for Existing Products” on page 85](#).

#### 6 Click Execute Action.

In the SVP Action list, the status of Pending appears in the Status field. After the fields are copied, the Status field changes to Complete and a dialog box appears, confirming that the action was successful. On the Sales Volume Planning screen, the Basis Quantity field in the Category Baseline list is now filled in for this new product.

#### Related Topics

[“Generating Baseline Basis Quantities for Existing Products” on page 85](#)

[“Precalculating an Adjusted Baseline Basis Quantity” on page 87](#)

## Precalculating an Adjusted Baseline Basis Quantity

After a baseline basis quantity has been established, you can adjust this quantity to reflect growth or decline rates by using a percentage change algorithm or trended volume by period.

You can precalculate changes to the adjusted baseline basis quantity. This precalculation determines the quantity values for this data and provides you with a quick reference of the total quantity. If you believe that quantity values have been skipped and want to understand the source value (precalculation) for all periods including skipped periods, select the same periods before performing the precalculation.

After making all of the needed adjustments to the baseline basis quantity, you copy the values to the baseline basis planning quantity.

#### *To precalculate an adjusted baseline basis quantity*

- 1 Navigate to the Administration - Sales Volume Planning screen.
- 2 Click the Copy Actions view tab.
- 3 In the Copy Actions form, create a new record.
- 4 In the Account field, select the account in the account-product hierarchy that will be used to calculate the adjusted baseline basis.
- 5 Complete either the Category field or the Source Product field.
  - In the Category field, enter the category in the category-product hierarchy that will be used to calculate the adjusted baseline basis.

**NOTE:** You must fill in the Account field *before* filling in the Category field.

- In the Source Product field, enter the product in the category-product hierarchy that will be used to calculate the baseline basis.
- 6 Fill in the rest of the fields in the form. The available fields are described in [Step 6 of “Generating Baseline Basis Quantities for Existing Products” on page 85](#).
- 7 Click Calculate Source.

The Source Value field displays the unadjusted Source field quantity and the Target Value field displays the adjusted Source field quantity.

- 8 (Optional) Enter a quantity value in the Override field.

The value in the Override field is displayed in the Target Value field, while the %Change field is adjusted to reflect the value in the Override field.

**NOTE:** The Override field is not dependent on the selections in the Algorithm or %Change fields.

**Related Topics**

[“Generating Baseline Basis Quantities for Existing Products” on page 85](#)

[“Generating Baseline Basis Quantities for New Products” on page 86](#)

## About SVP Algorithms

The following two algorithms are available in the SVP module:

- **Percentage change.** Refers to the type of algorithm to be used during the specified SVP action. That is, it modifies the source value by a percentage as it populates the target proportionately. Period definition is not required when using %Change.
- **Trended Volume Period.** Compares Trend Volume Period with Source Period and extrapolates by percentage from Source to Target. Algorithm period definition is a required field. [Table 11 on page 88](#) shows settings for Source, Algorithm, Variance, and Target periods.

Table 11. Trended Volume Period

Source	Algorithm (Trended Volume)	Variance	Target
Start=Wk 1, 1998 (Qty 100)	Start=Wk 1, 1999 (Qty 110)	10% (plus 11)	Start=Wk 1, 2000 (Qty 121)
End=Wk 2, 1998 (Qty 100)	End=Wk2, 1999 (Qty 90)	10% (minus 11)	End=Wk 2, 2000 (Qty 81)



## Copying Baseline Information to Additional Fields

You might want to copy baseline information to other fields within your Siebel Consumer Goods application. There are the two instances for which you need to copy baseline information:

- From the Baseline Basis Quantity field to Baseline Planning Quantity
- From the Baseline Planning Quantity to Baseline Quantity field

This task is a step in [“Process of Sales Volume Planning” on page 73](#).

### Baseline Basis Quantity to Baseline Planning Quantity

You must copy the baseline basis to the Baseline Planning Quantity field. At this point, SVP administrators release the imported SVP data to their senior managers. These managers modify the data to reflect their particular markets and allocate the modified quantities down the account-product hierarchy. For more information, see [“Skipping SVP Source Data \(End User\)” on page 95](#).

### Baseline Planning Quantity to Baseline Quantity

After senior managers have modified and allocated the baseline planning quantities, you copy the Baseline Planning Quantity field to the Baseline Quantity field. A baseline quantity is the number of products that would have been sold in the absence of promotional events. After establishing a baseline quantity, key account managers can use this value in conjunction with the Siebel Trade Promotions module to better plan incremental promotional volume at an account. Baseline quantity can also be used to establish and generate volume targets.

The following procedure describes how to copy baseline information into other fields. You can use this procedure to copy Baseline Basis Quantity to Baseline Planning Quantity and to copy Baseline Planning Quantity to Baseline Quantity.

#### *To copy baseline information into other fields*

- 1 Navigate to the Administration - Sales Volume Planning screen.
- 2 Click the Copy Actions view tab.
- 3 In the Copy Actions form, create a new record.
- 4 From the Action field drop-down list, select Copy Field.
- 5 Fill in the necessary fields.

Some fields are described in the following table.

Field	Comments
Description	The name of the sales volume plan.
Account	The account in the account-product hierarchy that is copied.

Field	Comments
Category	The category in the category-product hierarchy that is copied. Fill in either the Category field or the Source Product field.
<b>Source</b>	
Source Product	The product in the category-product hierarchy that is copied. Fill in either the Category field or the Source Product field.
Source Field	The source field that is copied from.
Start Period	The starting period of the source field.
End Period	The ending period of the source field.
Source Value	Copy if source is equal to this value.
Apply ADL	Select the Apply ADL check box if you want to create records for only the accounts that have already been added to the new products ADL. If there is no ADL established for the new product or you want to sell the new product to the same as accounts the source product was sold, leave this check box blank. For more information about Authorized Distribution Lists, see <a href="#">Chapter 6, "Product Distribution."</a>
Default Value	If value is not set to anything, set it to this.
Include Skipped	Check this field to include skipped account-product periods.
<b>Algorithm</b>	
Algorithm	The algorithm; for example, Percentage Change or Trended Volume-Period. For more information about algorithms, see <a href="#">"About SVP Algorithms" on page 88.</a>
%Change	The percentage change from the baseline field to the other field. You must select Percentage Change in the Algorithm field to perform this action.
Override	If the target field already exists in the database, you can use this field to specify the value with which the existing value is overridden.
<b>Target</b>	
Target Product	The product in the category-product hierarchy that is copied. Fill in either the Category field or the Source Product field.
Target Field	The target field to which a value is copied.
Start Period	The starting period of the target field.
End Period	The ending period of the target field.
Duration	The duration of the target field from the start period to the end period.
Target Value	Value of target is this. This one constant target value overwrites all other values.

6 Click Execute Action.

In the SVP Action list, the status of Pending appears in the Status field.

**NOTE:** If you are preparing sales volume data for multiple periods and want to track the progress of the action, click the Sub Actions tab to view the status of the periods as they are processed.

After the fields are copied, the Status field changes to Complete and a dialog box appears, confirming that the action was successful.

## Manually Entering SVP Data

Marketing administrators who want to prepare sample databases for training or testing purposes can manually enter account-product data for use in the SVP process. Manually entering this data eliminates the need to import these records.

**NOTE:** Use caution when entering this data manually. It is preferable to establish and use a separate sample SVP hierarchy for training purposes.

This task is a step in [“Process of Sales Volume Planning” on page 73](#).

### *To manually enter account-product data*

- 1 Navigate to the Administration - Data screen > Account Product view.
- 2 Enter the account-product data that you want.

## Performing Ongoing SVP Administration Tasks

This topic details some of the ongoing administration tasks that you must carry out as part of SVP administration, and contains the following topics:

- [“Creating SVP Periods” on page 92](#)
- [“Importing or Copying SVP Data” on page 92](#)
- [“Resetting Account and Category Levels” on page 92](#)
- [“Performing Periodic Aggregations” on page 93](#)
- [“Allocating Changes Down Multiple Levels of the Account Hierarchy” on page 93](#)
- [“Resetting SVP Hierarchy Levels” on page 93](#)
- [“Resetting SVP Hierarchy Locks” on page 93](#)

This task is a step in [“Process of Sales Volume Planning” on page 73](#).

## Creating SVP Periods

You must create periods to represent the units of time you work with in the SVP process. SVP supports period types of weeks or months. For information about creating periods, see [Chapter 3, "Getting Started."](#)

## Importing or Copying SVP Data

You must import the data to use in the SVP process. You can import SVP source data into any of the standard product movement tables (baseline, target, consumption, and shipment) using Siebel Enterprise Integration Manager (EIM). Data imported into these tables is copied or staged to the appropriate catalog category tables for the same product movement types. The SVP module uses predefined interface tables for importing source data. For more information, see the *Siebel Enterprise Integration Manager Administration Guide*.

**NOTE:** SVP source data is recorded at the lowest level of your account and product hierarchies. Therefore, when importing SVP source data, you must import this data at the lowest level of your hierarchies—for example, at the Ship To-SKU level.

You can also copy SVP data from existing products to populate records for similar new products. This data can then be used as the source records for your upcoming SVP actions. For more information about copying SVP data from existing products to populate records for similar new products, see ["Generating Baseline Basis Quantities for New Products" on page 86](#).

## Resetting Account and Category Levels

Resetting levels displays the current levels associated with each account represented in your SVP hierarchy. If you want the Account Level field to auto-populate in SVP views and forms, you must reset account and category levels. Resetting account levels allows you to view an account's level.

### *To reset Account and Category levels*

- 1 Navigate to the Administration - Sales Volume Planning screen.
- 2 Click the Other Actions view tab.
- 3 In the Other Actions form, create a new record.
- 4 From the Action field drop-down list, choose Reset Levels, and then fill in the Description field.
- 5 Click Execute Action.

In the SVP Action list, the status of Pending appears in the Status field. After the levels in the account-product hierarchy are reset, the Status field changes to Complete and a dialog box appears, confirming that the action was successful.

## Performing Periodic Aggregations

You need to run the Aggregate process to incorporate account, category, or product changes into the SVP hierarchy. You also need to run the process to aggregate baseline data changes or to create SVP data for future periods.

For information about running the Aggregate process, see [“Performing the Initial Aggregation” on page 81](#).

## Allocating Changes Down Multiple Levels of the Account Hierarchy

If changes need to be allocated down *multiple levels* of the account hierarchy, then you need to use the Administration - Sales Volume Planning screen and run an Allocate action. For example, if the Vice President of Sales mandates a change in the forecast at the root account level that applies to all accounts within the hierarchy, run the Allocate action.

This action pushes changes down the account hierarchy from the selected account to any of the 10 hierarchical levels.

### Related Topic

[“About Category and Account Level Allocation \(End User\)” on page 98](#)

## Resetting SVP Hierarchy Levels

During the SVP period, you can reset the levels of an account-product tree. Perform this task if new accounts have been added or the category-product hierarchy has changed. Resetting account-product tree levels resets the account level and category level designations to reflect the updated hierarchical change.

For information, see [“Resetting Account and Category Levels” on page 92](#).

## Resetting SVP Hierarchy Locks

You can reset the locks of an SVP hierarchy to allow users at lower account levels to modify SVP data. You can also reset SVP hierarchy locks if an account team lock is preventing a user from modifying that user's data and the lock cannot be resolved by the members of the account team. For example, the members of the account team might be out of the office, on vacation, or a lock error might have occurred. Resetting SVP hierarchy locks overrides the lock that was established and allows other users to modify the previously locked records.

### *To reset SVP hierarchy locks*

- 1 Navigate to the Administration - Sales Volume Planning screen.

- 2 Click the Other Actions view tab.
- 3 In the Other Actions form, create a new record.
- 4 From the Action field drop-down list, select Reset Locks, and then fill in the Description field.
- 5 Click Execute Action.

In the SVP Action list, the status of Pending appears in the Status field. After the locks in the hierarchy are reset, the Status field changes to Complete and a dialog box appears, confirming that the action was successful.

## About SVP Data (End User)

SVP data can consist of the following:

- **Shipment.** *Shipments* are the amount of product shipped to accounts during a period of time. Many organizations use shipments to derive their target quantities. Because shipments are always historical data, end users can view, but not modify, the shipment data.
- **Consumption.** *Consumption* is the amount of product purchased by customers during a period of time. Many organizations use consumption to derive baseline quantities. Because consumption is always historical data, end users can view, but not modify, the consumption data.
- **Baseline.** *Baseline* data is the amount of product that would have been shipped, sold, or consumed in the absence of a promotion for a given period of time.

The Baseline view also shows incremental quantity, the amount of product that was shipped, sold, or consumed as a direct result of a promotion for a given period of time. For example, a product might be on sale for 50% off, and as a result a customer purchases two incremental pallets of the product in addition to the one the customer regularly purchases. Incremental quantity is generated during promotion planning. For more information, see [Chapter 8, "Trade Promotions."](#)

- **Target.** *Targets* are the amount of product a manufacturer expects its sales force to sell in a given period of time. This product data can be derived from historical shipment, baseline, or consumption information. Targets can incorporate growth or decline rates for the SVP period.

## Viewing SVP Data (End User)

Throughout the SVP period, sales managers view SVP data to monitor shipment or consumption amounts, gather feedback on the effectiveness of promotions, and track their progress in meeting their targets.

This task is a step in ["Process of Sales Volume Planning" on page 73](#).

### *To view SVP data*

- 1 Navigate to the Sales Volume Planning screen.
- 2 On the Sales Volume Planning link bar, click the data you want to view.

- 3 In the Accounts list, select an account.
- 4 In the Category list, select the root category or click the hyperlink in the Name field to drill down through the subcategories until you reach the level that you want to view.
  - To return to a higher level, click the Go Up button.
  - To return to the root, or highest-level category, click the browser's Back button.
- 5 Scroll down to the Products list and click a product name to view the data.
- 6 (Optional) In the Product list at the bottom of the screen, from the drop-down list, choose Period Analysis to view data in a graphical chart by period.

#### Related Topic

["About SVP Data \(End User\)" on page 94](#)

## About Querying the Category and Product Lists (End User)

When you create a query to find data in the Category Baseline and Product Baseline lists, the query definition is applied to your subsequent selections within the Accounts and Category lists.

For example, to view category baseline records for the next quarter, you define the query to return results for the three months in the next quarter. When you drill down to the next level, the previously defined query automatically returns records for only the next quarter.

Similarly, queries created in the Product Baseline list are applied when subsequent records in the Products list are selected.

For more information about creating, executing, and canceling queries, see *Siebel Fundamentals*.

## Skipping SVP Source Data (End User)

After importing the SVP source data, managers can make adjustments to reflect changes in the account-product hierarchy. For example, an account might no longer be part of your organization, a product might have been discontinued, or a period might not apply to SVP. These adjustments are made by excluding or *skipping* some of the source data. You can skip data at any level of the hierarchy. For any parent records that you choose to skip, all child records are also skipped. You can skip data for either Baseline or Shipment data.

**NOTE:** The following procedure uses shipment data as the source for the SVP process. Your company might use a different source depending upon its business practices.

#### To skip source data

- 1 Navigate to the Sales Volume Planning screen and either of the following links, as appropriate to your needs:
  - a **Baseline.** To view the Baseline view.

**b Shipment.** To view the Shipment view.

- 2 In the Accounts list, select an account record.
- 3 In the Category list, select the product record for which you want to view shipments.

In the Category Shipment list, the quantity of shipped cases for the selected account-product pair appears.

- 4 In the Category Shipment list, select the Skip check box for each period you want to skip. You can skip data at any level.

**NOTE:** Skipping a category causes all products in that category to be skipped. If you do not want to skip all products in a category, you can skip at the product level.

When the administrator aggregates this data, the periods for which you selected the Skip check box are not included in the final numbers.

## Locking and Modifying SVP Data (End User)

Locking provides a mechanism that allows users to modify data throughout the account-product-category hierarchy without conflicting with other users' modifications.

The SVP module offers two options for locking account-product nodes. The first option is automatic locking based on the account-product node's position in the SVP hierarchy. Any user in the account hierarchy can lock a node to prevent users at lower positions in the account hierarchy from modifying their account-product nodes. The second option for locking is to manually set a lock.

This task is a step in ["Process of Sales Volume Planning" on page 73](#).

### About Automatically Locking Account-Product Nodes

The SVP module uses an allocation lock process during the allocation and aggregation process. An *allocation lock* is a Boolean variable kept at the highest account level. When an allocation lock is set, the lock prevents all subordinate account levels from updating SVP data. Before an allocation lock is granted, the application checks the current account node to confirm that its upper lock is active and searches to ascertain that no allocation lock is currently held in the superior account node.

Allocation locks are maintained for the account hierarchy. Within a single instance of the category-product hierarchy, all updates are allocated and aggregated immediately.

After a user has completed SVP allocation-related updates, the actual allocation is invoked, at which time the Siebel application modifies the locks as follows:

- By updating the upper lock in the originating allocation node
- By disallowing further changes there until the Aggregate action is performed

**NOTE:** You can see which nodes have been locked by navigating to the Allocate Lock column in the Accounts list in the Sales Volume Planning screen. You might need to manually refresh this view to see the results of a recently attempted lock request.



## Locking, Modifying, and Allocating Account-Product Nodes

You can lock and unlock an account-product node manually. However, you can unlock the account-product node only if no changes have been made. If changes have been made, the node remains locked until one of the following actions has occurred:

- The changes are allocated.
- The aggregate is performed, and the specific updates are aggregated up the organizational hierarchy.

The following procedure uses baseline planning quantity as an example to describe how to lock and modify account-product nodes. It also includes information about how locking and unlocking can occur automatically.

### *To lock, modify, and allocate the baseline planning quantity*

- 1 Navigate to the Sales Volume Planning screen > Baseline view.
- 2 In the Accounts list, select an account record.
- 3 Lock the category for which you want to modify the baseline planning quantity as follows:
  - To lock the category manually, click Lock.
  - To lock the category automatically:
    - In the Category list, select the category for which you want to modify the baseline planning quantity.
    - Optionally, navigate down to the product list and select the product for which you want to modify the baseline planning quantity.
- 4 Scroll down to the Category Baseline or Product Baseline list, select the record you want to modify, and then edit the fields.

Modifying a baseline planning value automatically locks the selected account nodes when connected to the server (even if you did not click Lock in [Step 3](#)).

- 5 To apply the same change to multiple periods, click Mass Change, complete the fields in the Baseline Mass Change dialog box, and then click Execute.

Adjustments made to the baseline planning quantity affect only the products and categories within the account.

- 6 Perform one of the following actions to view the navigation mechanism for the Product Baseline:
  - a **Navigate to a category sublevel.** In the Category Baseline list, from the Category Baseline drop-down list, select one of the following:
    - Period Analysis
    - Sub-Account Baseline
    - Sub-Category Baseline
    - Sub-Product Baseline
  - b **Navigate to a product sublevel,** and do the following:

- In the Category List, select a product.
- Scroll down to the Product Baseline list and from the Product Baseline drop-down list, select Sub-Account Baseline.

**C In the Category Baseline or Product Baseline lists, click Refresh.**

This step is for informational purposes only to see how [Step 4](#) and [Step 5](#) (if executed) impact upon the allocation of values for an account down through the category hierarchy. The Basis% field is recalculated to reflect the new proportions of the account-product hierarchy.

Repeat [Step 4](#) until you finish modifying the basis planning quantity.

**7** Scroll up to the Accounts list, and click Allocate.

The baseline planning quantity is allocated to the next lower level of the account hierarchy. When the allocate action is complete, the account-product node is unlocked. Managers at the next lower level of the account hierarchy repeat this process until the baseline planning quantity is allocated to the lowest level of the account hierarchy.

**NOTE:** If the allocation does not complete (due to pending subaction records that have not been processed), then the action does not complete and the account remains in locked mode.

## About Category and Account Level Allocation (End User)

Category and account level allocation functionality allows users to push changes down the account and category-product hierarchies in segments to allow groups of users to make subsequent changes.

- **Category allocation.** Also known as intra-account allocation, category allocation occurs automatically after a user changes baseline records. It occurs within the category-product structure associated with the specific account that is being modified. When a user makes a change and commits that change by stepping off the record, the change is pushed out through the category-product hierarchy within that account.
- **Account allocation.** There are two ways to trigger account level allocation, depending on how many levels changes need to be allocated:
  - **Down one level.** You can allocate changes down one level using the Allocate button in the Sales Volume Planning screen.
  - **Down multiple levels.** Only an administrator can allocate changes down multiple levels, using the Administration - Sales Volume Planning screen.

## About the Account Allocation Level Parameter

The Account Allocation Level parameter is used to define the scope of an allocation. It specifies the account level in the SVP hierarchy that is used when performing an SVP allocation action. For example, if you want to allocate two levels, navigate to the Administration - Sales Volume Planning screen and in the Action form, click the Allocation Level drop-down arrow and choose Allocation Level 2.

**NOTE:** The parent account is always designated as Level 1 and each subaccount level is designated as the next sequential number. These allocation levels are specific to the SVP account hierarchy.

## About Allocating Changes Down One Level of the Account Hierarchy

By allocating changes while in the Sales Volume Planning screen, the end user can allocate changes down *one level* of the account hierarchy.

**NOTE:** Category-product changes are allocated within the given account immediately upon stepping off of the record.

For more information about allocating changes, see [“Locking and Modifying SVP Data \(End User\)”](#) on page 96.

# Number Handling and SVP Actions and Percentage-Basis Calculation

Negative and decimal numbers are handled differently by the various actions as follows:

- **Copy Field and Copy Product actions.** Negative source records are converted to target records with a value of zero by default. This change can be made through configuration by setting the Allow Negatives field user property, which transfers the unaltered number. Floating point decimal numbers are copied as-is in these types of actions.
- **Aggregation actions.** Both negative and floating point decimal numbers are supported and calculated as such.
- **Allocation actions.** Negative and floating point decimal numbers are zeroed-out and not supported. Floating point decimals in the SVP quantity fields are truncated such that only the integer portion of the value is taken into consideration. For currency fields, two digits after the decimal point are calculated.

The percentage basis is calculated in each SVP-specific Category list (for example, Category Baseline or Category Target) as the proportion of the record to the total value of records in the referenced list.

## About Configuring Siebel Consumer Goods for SVP

To configure Siebel Consumer Goods for SVP, perform the following tasks:

- 1 [“Setting Up Siebel Workflow Processes for Consumer Goods”](#) on page 27

- 2 “(Optional) Modifying the SVP Business Service” on page 100
- 3 “(Optional) Configuring SVP Category Aggregation and Mass Change” on page 100

## (Optional) Modifying the SVP Business Service

You can modify the SVP business service. For example, you might want to have the business service send an email to alert the system administrator when the workflow process is complete. This eliminates the need for the system administrator to monitor the system throughout the entire process.

**CAUTION:** Do *not* attempt to modify the SVP workflow process.

### *To modify the SVP business service*

- 1 Navigate to the Administration - Business Process screen > Workflow Processes view.
- 2 In the Workflow Processes list, click Query.
- 3 In the Process Definition form, in the Name field, type CG SVP Process.
- 4 Click Go.
- 5 In the Name field, click the hyperlink for the CG SVP Process that is active.

The Workflow Process Designer view appears. You can use the graphical flowchart tool in this view to modify the business service.

For more information about using Siebel Business Process Designer, see the *Siebel Business Process Framework: Workflow Guide*.

## (Optional) Configuring SVP Category Aggregation and Mass Change

To deliver a comprehensive and performance oriented solution that provides the ability to view the SVP data in units, Gross Revenue, and Net Invoice Revenue, SVP category Aggregation is available in the Consumer Goods product. SVP Category Aggregation enables the user to specify those fields that are linked back to SVP from the promoted products in the plans through Business Component User Properties. For more information about promoted products, see [Chapter 8, “Trade Promotions.”](#) Before you can use Category Aggregation, you must first enable it through Siebel Tools.

The Mass Change button allows you to perform an update on the Baseline Planning Currency and the Baseline Planning Qty fields for Category Baseline records. It is possible to make other fields visible in the Field drop-down list on the Mass Change dialog box and enable Mass Change functionality on custom fields. Before you can change these fields, however, you must first make repository changes.

### Enabling Category Aggregation and Mass Change of Multiple Fields

To enable SVP Category Aggregation and Mass Change of multiple fields, you must make repository changes. These changes are described in the following procedure.

**To enable category aggregation and mass change of multiple fields**

- 1 Log in to Siebel Tools.
- 2 In the Object Explorer, select the Applet object, and in the Object List Editor, query for the following Applet: CG SVP Category Baseline List Applet, and do the following:
  - a In the Object Explorer, select the Controls child object, and in the Object Explorer List create a new record with the values shown in the following table.

Field	Value
Name	CatAggregate
Method Invoked	CatAggregate
Caption – String Reference	SBL_CALCULATE-1004224604-02X
Caption	This field is auto-populated.

- b In the Object Explorer, select the Applet Web Template child object, and in the Object Explorer List, select the Edit List item, right click and then select Edit Web Layout.
  - c Drag and drop the CatAggregate control that you just created beside the Mass Change button.
  - d Click File, and then Save.
  - e Close the Edit Web Layout window.
- 3 In the Object Explorer, select the Business Component Object, and in the Object List Editor, query for the following business component: CG SVP Product Baseline-Aux, and perform the following actions:
  - a In the Object Explorer, select the Multi Value Field child object, and in the Object List Editor, select the Promotion Incremental Qty item.
  - b Modify the Name field so that it reads MVF Incremental Qty
 

**NOTE:** This field might already be changed.
  - c In the Object Explorer, select the Field child object, and create a new field with the values shown in the following table.

Field	Value
Name	Promotion Incremental Qty
Calculated	TRUE
Calculated Value	IfNull(Sum([MVF Incremental Qty]),0)
Type	DTYPE_NUMBER

- d In the Object Explorer, select the Business Component User Property child object, and create the following new user properties with the values shown in the following table.

Name	Value
Category Aggregation Field 1	"Promotion Incremental Qty", "Incremental Cases"
Cat Aggregation Include Skipped	N
Build Tree Include Cat Aggregation Info	Y

- 4 In the Object Explorer, select the Pick List object, and in the Object List Editor, query for the following picklist: CG SVP Baseline Change Record PickList, and modify the values shown in the following table.

Field	Value
Static	FALSE
Search Specification	Blank (You must remove the search specification value.)

- 5 Save all your changes, and back up the current SRF.
- 6 Recompile the SRF.
- 7 Stop the Siebel Server and replace the old SRF with the newly compiled version.
- 8 Restart the Server.

## Using Category Aggregation

When it has been enabled, you can use category aggregation to link fields back to SVP from the promoted products in the Plans.

### *To link fields back to SVP from the promoted products*

- 1 Navigate to the Sales Volume Planning screen.
- 2 In the Accounts list, query for and select an account for which you want to link SVP fields back to the promoted products.

**NOTE:** You must have already created entire promotions with categories, products, and their attributes defined. For more information, see [Chapter 8, "Trade Promotions."](#)

- 3 In the Category list, select the required category, and scroll down to the Category Baseline list.
- 4 Click Calculate.

**NOTE:** A Sales Volume Planning (SVP) shipment record can be associated with many promoted products. However when an SVP shipment record is associated with a promoted product, no adjustment in shipment quantity is made for other promoted products with which the shipment record has already been associated. Therefore, each promoted product has the full shipment quantity associated with it.

## Making Extra Fields Available for Mass Change

After the repository changes have been made, it is possible to update extra fields using the Mass Change button by adding new entries to the SVP Source LOV.

### *To make extra fields available for mass change*

- 1 Navigate to the Administration - Data screen > List of Values list view.
- 2 In the List of Values list, create a new record.

Some fields are described in the following table.

Field	Description
Type	Enter SVP Source to this field.
Display Value	The display value of the field that you want to display.
Language-Independent Code	The LIC of the field that you want to display.
Order	The order in which the field appears in the drop-down list.

Repeat [Step 2](#) for all extra fields that you want to add.

When you have added these extra fields, you can perform a mass change on these fields as described in [“Locking and Modifying SVP Data \(End User\)”](#) on page 96.





# 8

## Trade Promotions

This chapter describes how to create promotions at both corporate and account levels and how to simulate the outcome of a trade promotion. Topics include:

- [“About Trade Promotions” on page 105](#)
- [“Scenario for Setting Up and Carrying Out Trade Promotions” on page 106](#)
- [“Process of Managing Trade Promotions” on page 106](#)
- [“Creating Corporate Promotions” on page 107](#)
- [“Adding Promoted Categories to Corporate Promotions” on page 108](#)
- [“Adding Products to Promoted Categories” on page 109](#)
- [“Attaching Literature to Corporate Promotions” on page 109](#)
- [“Viewing Corporate Promotions \(End User\)” on page 110](#)
- [“Simulating Promotions for Promoted Products and Categories \(End User\)” on page 112](#)
- [“Viewing and Copying Lift Factors \(End User\)” on page 115](#)
- [“Creating Plans \(End User\)” on page 116](#)
- [“Enabling Phasing for Promotions \(End User\)” on page 119](#)
- [“Creating Deals for Promotions \(End User\)” on page 121](#)
- [“Working with Promoted Categories \(End User\)” on page 122](#)
- [“Working with Promoted Products \(End User\)” on page 130](#)
- [“Working with Promotions \(End User\)” on page 135](#)
- [“About Configuring Trade Promotions” on page 138](#)

### About Trade Promotions

There are two kinds of trade promotions—corporate promotions and account promotions.

*Corporate promotions* are company-wide promotions of a product or a brand. Accounts can participate in corporate promotions which are run for a specific time period and contain the objective of the promotion, suggested tactics, and other information. For example, a beverage company decides to promote a new product by running a corporate promotion with the recommended tactics of a temporary price reduction (TPR) and in-store displays.

*Account promotions* are more specific promotions and can be based on a corporate promotion. A *plan* is a group of account promotions that depicts the results of account promotions, such as spending and volume.

## Scenario for Setting Up and Carrying Out Trade Promotions

This scenario is an example of a process performed by brand managers and key account managers. Your company might follow a different process according to its business requirements.

A large beverage manufacturer has just developed a new brand of fruit-flavored beverage. The brand manager for the new brand decides that a corporate promotion to promote the new brand will be launched for the following year. The corporate promotion recommends a temporary price reduction (TPR) and a themed in-store display as tactics during Week 10 of that year.

The key account manager for a large chain of grocery stores is responsible for creating account promotions to generate incremental volume and brand awareness. After creating an account plan, she can add to the plan the corporate promotion and other account promotions that she creates. She uses the promotion simulation feature to evaluate how a given promotion will perform at her account. After deciding to run a promotion at her account, she adds the promotion to the account plan. Then, she selects the promoted categories to include in the promotion. The selected promoted categories contain the products that the key account manager includes in the promotion. These products are designated as *promoted products*. For each promoted product, she creates a deal to indicate how much the grocery chain is paid and the source of funding.

When the key account manager completes these steps, she submits the account promotion to her manager for approval by changing the status of the account promotion. Her manager has several options in evaluating the account promotion, ranging from rejecting to approving the account promotion, pending review and acceptance by the customer.

After the account promotion is approved internally, the key account manager seeks acceptance from the account.

**NOTE:** This business scenario describes one method for creating promotions; promotion management of a brand and associated products. Promotions can also be managed at the product (SKU) level.

## Process of Managing Trade Promotions

This topic lists the tasks typically performed by administrators and end users when managing trade promotions. Your company might follow a different process according to its business requirements.

### Administrator Procedures

The following list shows tasks administrators typically perform to manage trade promotions:

- 1 [“Creating Corporate Promotions” on page 107](#)
- 2 [“Adding Promoted Categories to Corporate Promotions” on page 108](#)
- 3 [“Adding Products to Promoted Categories” on page 109](#)
- 4 [“Attaching Literature to Corporate Promotions” on page 109](#)

### End-User Procedures

The following list shows tasks end users typically perform to access and use trade promotions:

- [“Viewing Corporate Promotions \(End User\)” on page 110](#)
- [“Simulating Promotions for Promoted Products and Categories \(End User\)” on page 112](#)
- [“Viewing and Copying Lift Factors \(End User\)” on page 115](#)
- [“Creating Plans \(End User\)” on page 116](#)
- [“Enabling Phasing for Promotions \(End User\)” on page 119](#)
- [“Creating Deals for Promotions \(End User\)” on page 121](#)
- [“Working with Promoted Categories \(End User\)” on page 122](#)
- [“Working with Promoted Products \(End User\)” on page 130](#)
- [“Working with Promotions \(End User\)” on page 135](#)

## Creating Corporate Promotions

Brand managers create and maintain corporate promotions. For example, the brand manager of a new fruit-flavored beverage might want to run a Summer Olympics promotion of the product. The brand manager creates a corporate promotion. The promotion provides information about the recommended method for running the promotion, start and end dates for the promotion, the objective for the promotion, and other details.

Key account managers review corporate promotions when creating promotions for their accounts. Information included in corporate promotions, such as suggested tactics for promoting products, is useful to key account managers during the account promotion planning process.

This task is a step in [“Process of Managing Trade Promotions” on page 106](#).

### *To create a corporate promotion*

- 1 Navigate to the Administration - Data screen > Corporate Promotions view.

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

Field	Comments
Period	Period of time for the promotion.  By default, the Start and End dates for the promotion, shipment, and consumption fields are equal to the start and end dates of the period.
Promotion	Name of the promotion. Click the hyperlink to navigate to the Promotion Literature view for this promotion.

**NOTE:** Any account promotion that is based on a corporate promotion relies on the corporate promotion for its name. Before you delete a corporate promotion, be sure to first delete any account promotions that are based on that corporate promotion.

## Adding Promoted Categories to Corporate Promotions

When you have created a corporate promotion, you associate promoted categories with it by putting them on the Promoted Categories list. A promoted category can contain one or more products that you want to promote as part of the corporate promotion. For information about how to associate a product with a promoted category, see [“Adding Products to Promoted Categories” on page 109](#).

This task is a step in [“Process of Managing Trade Promotions” on page 106](#).

### *To add a promoted category to corporate promotions*

- 1 Navigate to the Administration - Data screen > Corporate Promotions view.
- 2 In the Corporate Promotions list, select a promotion record.
- 3 Click the Promoted Categories view tab.
- 4 In the Promoted Categories list, create a new record.

Select values for the fields that are described in the following table.

Field	Comment
Category	Select a category from the drop-down list.
Period	By default the period for the corporate promotion appears in this field. You can specify alternative values so that the selected promoted category is promoted for a subperiod of the corporate promotion period.

Field	Comment
Tactics	Select tactics to use for the promotion. For example, select a feature display or temporary price reduction as a tactic to promote the selected promoted category.
Start	By default, the start date of the period.
End	By default, the end date of the period.

## Adding Products to Promoted Categories

When you have created a promoted category, you associate products with it by putting them on the Promoted Products list.

This task is a step in ["Process of Managing Trade Promotions" on page 106](#).

### *To add products to promoted categories*

- 1 Navigate to the Administration - Data screen > Corporate Promotions > Promoted Categories.
- 2 In the Promoted Categories list, select a promoted categories record.
- 3 In the Promoted Products list, create a new record.

Complete the fields that are described in the following table.

Field	Comment
Product	Select a product from the drop-down list.  <b>NOTE:</b> This product must be associated with the promoted category.
SKU	Stock keeping unit number of the product. By default, this field is populated.
Start Date	By default, the start date of the product.
End Date	By default, the end date of the product.
Tactics	Select tactics to use for the product. For example, select a feature display or temporary price reduction as a tactic to promote the selected promoted category.

## Attaching Literature to Corporate Promotions

You can associate literature with corporate promotions. Each literature record in the Literature list identifies one attached file. If you have the appropriate application installed on your computer, you can open these files by clicking the hyperlink in the Name field of the record. For example, if a Microsoft PowerPoint (.ppt) presentation file is listed and you have PowerPoint installed on your computer, you can open the file by clicking the hyperlink.

This task is a step in [“Process of Managing Trade Promotions” on page 106](#).

### ***To attach literature to a corporate promotion***

- 1 Navigate to the Administration - Data screen > Corporate Promotions view.
- 2 In the Corporate Promotions list, select the corporate promotion record to which you want to attach literature.
- 3 Click the Literature view tab.
- 4 In the Literature list, create a new record, and complete the necessary fields.

For more information about working with literature in Siebel applications, see the *Siebel Applications Administration Guide*.

## **Viewing Corporate Promotions (End User)**

Key account managers can view information associated with corporate promotions, such as corporate promotions, promoted categories, products, or literature, to determine whether their accounts will take part in the corporate promotions.

This task is a step in [“Process of Managing Trade Promotions” on page 106](#).

### ***To view corporate promotions***

- 1 Navigate to the Corporate Promotions screen.
- 2 Select a corporate promotion record.

For a description of the fields in this view, see [“Creating Corporate Promotions” on page 107](#).

### ***To view corporate promotions in a Gantt chart***

- 1 Navigate to Corporate Promotions screen.
- 2 Drill down on the Promotion field hyperlink for a selected corporate promotion.
- 3 Click the Calendar view tab.

### ***To view promoted categories of a corporate promotion***

- 1 Navigate to Corporate Promotions screen.
- 2 Drill down on the Promotion field hyperlink for a selected corporate promotion.
- 3 Click the Promoted Categories view tab.

### ***To view promoted products of a corporate promotion***

- 1 Navigate to Corporate Promotions screen.
- 2 Drill down on the Promotion field hyperlink for a selected corporate promotion.
- 3 Click the Promoted Categories view tab.
- 4 Select a promoted category record.

The promoted products associated with the selected promoted category appear in the Promoted Products list.

### ***To view literature for a corporate promotion***

- 1 Navigate to Corporate Promotions screen.
- 2 Drill down on the Promotion field hyperlink for a selected corporate promotion.
- 3 Click the Literature view tab.

## **Gantt Charts**

The Gantt charts are used to graphically display the following information:

- All corporate promotions
- Promotions
- Promotions belonging to an account
- Promotions belonging to a plan

The left side of the chart lists promotion records, and the right side of the chart shows scheduled time periods in a calendar format.

To zoom in or out on a particular time period, click the Zoom + or Zoom - buttons on the current time bar. To see a Gantt chart for a specific date, choose the date in the date field and click Go. To see a Gantt chart for the current date, click Today.

### ***To view the promotions Gantt chart***

- 1 Navigate to the Promotions screen > Promotion List view.
- 2 Drill down on the Promotion field hyperlink for a selected promotion.
- 3 Click the Calendar view tab.

### ***To view the accounts Gantt chart***

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Drill down on the Name field hyperlink for a selected account.
- 3 Click the Promotions Calendar view tab.

*To view the plans Gantt chart*

- 1 Navigate to the Plans screen.
- 2 Drill down on the Name field hyperlink for a selected plan.
- 3 Click the Calendar view tab.

## Simulating Promotions for Promoted Products and Categories (End User)

Promotion simulations allow key account managers to simulate the results of a promotion that is under consideration. Simulation results are saved as they are performed. Parameters that managers use to simulate the promotion include the period of the promotion, the category or product being promoted, the account where the promotion takes place, the promotion tactics, and the penetration of the promotion within the account (% ACV Promoted).

Promotion simulation also requires that lift factors be imported and stored in the Siebel Consumer Goods application. Lift factors indicate the expected sales volume increase when a category or product is promoted at an account, during a certain period, and with specific tactics. The combination of lift factors with the other promotion parameters allows promotion simulation to determine incremental and total volume.

**NOTE:** Lift factor information can be obtained from a third-party syndicated data provider. The lift factors can be either product-specific or category-specific. Lift factors are imported into the product and category lift tables using Siebel Enterprise Integration Manager (EIM). For more information, see the *Siebel Enterprise Integration Manager Administration Guide*.



Table 12 describes selected fields in the Simulation subview that are used to simulate product and category promotions.

**NOTE:** Fields are listed alphabetically.

Table 12. Fields In The Simulation Subview

Field	Comment
% ACV Promoted	Penetration of the promotion within the account.
Account	Account where the simulation is applied.
End Date	End date of the simulation.
Extended Baseline	(Simulated Baseline) multiplied by (% ACV Promoted) multiplied by (Lift).
Name	Name of the scenario to apply.
Number	Number of the scenario.
Select	Select this check box to apply the values for the selected scenario to the promoted product or promoted category.
Simulated Baseline	The baseline volume to which the lift factor is applied.
Simulated Incremental	The incremental volume to simulate.
Simulated Total	(Extended Baseline) plus (Simulated Incremental).
Start Date	Start date of the simulation.
Tactics	Tactics to apply during the simulation.

**NOTE:** Simulation can be performed at either a category or a product level, but not at both simultaneously.

This task is a step in [“Process of Managing Trade Promotions”](#) on page 106.

## Promotion Simulation for Promoted Products

Key account managers simulate the outcome of promoting products to determine the appropriate mix of products for a promotion. Before they begin the simulation, they must import lift factors for the product. Each lift factor is specific to an account, weekly period, and tactic.

After the product lift factors are imported and available in the Siebel Consumer Goods application, the key account managers have the option to simulate promotion of a product as part of a promotion.

For information about adding promoted products to promotions, see [“Adding Promoted Categories to Account Promotions”](#) on page 122.

**NOTE:** To simulate a product promotion, lift factors for the product must be imported and stored in the product lift factor table (S\_PROD\_LFT\_FACTOR). In the case of promotion simulation by product, the data from the selected scenario overwrites or populates the attributes of the promoted product.

### *To simulate promotion of a product as part of a promotion*

- 1 Navigate to the Promotions screen > Promotion List view.
- 2 Drill down on the Promotion field hyperlink for a selected promotion record.
- 3 In the Promoted Categories list, select the promoted category that contains the product for which you want to simulate a promotion.
- 4 Perform one of the following actions in the Promoted Products list:
  - Query for a promoted product.
  - Create a new promoted product.
- 5 In the Promoted Products list, fill in the following fields in the order presented:
  - Account
  - Tactics
  - % ACV Promoted
  - Start Date
  - End Date
- 6 Drill down on the Product field hyperlink for the selected promoted product record.
- 7 Click the Simulation view tab.
- 8 In the Simulation list, click Simulate.

In the Simulation list, the results of the simulated promoted product appear.
- 9 Modify any of the fields in [Step 5](#) and repeat [Step 6](#), [Step 7](#) and [Step 8](#) to generate another simulation.
- 10 After reviewing the scenarios, select one by selecting the check box.

The system updates the promoted product with the data from the selected scenario.

### **Promotion Simulation for a Category**

Key account managers can simulate the outcome of promoting a category. Before they begin the simulation, they must import lift factors for the category. Each lift factor is specific to an account, weekly period, and tactic.

**NOTE:** To simulate a category promotion, lift factors for the category must be imported and stored in the category lift factor table (S\_CATG\_LFT\_FACTOR).

For more information about lift factors, see [“Viewing and Copying Lift Factors \(End User\)”](#) on page 115.

### *To simulate a category promotion*

- 1 Navigate to the Promotions screen > Promotion List view.

- 2 Drill down on the Promotion field hyperlink for the promotion record that contains the category for which you want to simulate a category promotion.

The Promoted Categories list appears.

- 3 Fill in the following fields for the category for which you want to simulate a category promotion:

- Tactics
- % ACV Promoted
- Period

- 4 Drill down on the Category field hyperlink.

- 5 Click the Simulation view tab.

- 6 Click Simulate.

In the Simulation list, the results of the simulated category promotion appear.

## Viewing and Copying Lift Factors (End User)

Lift factors are used by key account managers to determine incremental volume at their accounts during promotion simulation. A lift factor is based on the promotional tactic, the account, and the period of time over which the promotion runs. Typically, customers can purchase lift factor data from third-party syndicated data providers and import them into Siebel base tables.

This task is a step in [“Process of Managing Trade Promotions” on page 106](#).

### *To view lift factors available for promotion simulation*

- 1 Navigate to the Lift Factors screen.
- 2 Click the visibility filter to see a list of the types of Lift Factors that you can view.

**NOTE:** You can view both category and product lift factors as subviews of Accounts.

### *To copy a lift factor*

- 1 Navigate to the Lift Factors screen.
- 2 In the Lift Factors list, copy the needed lift factor.

**NOTE:** You can view both category and product lift factors.

## Creating Plans (End User)

Key account managers can create plans and then create account promotions for their plans. These plans depict results of the promotions. For each plan, key account managers can also enter an ROI (return on investment) target. After a key account manager has run promotions in a plan, the key account manager can check to see whether the ROI target was met.

**NOTE:** Key account managers can also create a plan by copying an existing plan and giving it a new name. This can save considerable time if the plans have similar attributes. When copying a plan, all active discretionary promotions within the plan, as well as their promoted products, are copied.

This task is a step in [“Process of Managing Trade Promotions”](#) on page 106.

### To create a plan

- 1 Navigate to the Plans screen > Plan List view.
- 2 Create a new record, and complete the fields as described in the following table.

Fields	Comments
Name	Name of the plan.
Status	The status of the plan. It can have one of the following values: <ul style="list-style-type: none"> <li>■ New</li> <li>■ Cancelled</li> <li>■ Pending</li> </ul>
Revision	Revision number of the plan.
Account	Select the account for which you are creating a plan.
Period	Time period for which the plan is active.
Organization	Organization where the plan is implemented.

### To add a new promotion to a plan

- 1 Navigate to the Plans screen.
- 2 Drill down on the Name field hyperlink for a selected plan, and click the Promotions view tab.
- 3 In the Promotions list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

Field	Description
Account	Account for which the plan was created.
Actual Baseline Revenue	Actual baseline revenue.
Actual Baseline Volume	Equal to the estimated baseline volume.

Field	Description
Actual Incremental COGS	(Actual Incremental Cases) multiplied by COGS.
Actual Incremental Revenue	(Actual Total Revenue minus Actual Baseline Revenue).
Actual Incremental Volume	(Actual Total Volume minus Actual Baseline Volume).
Actual ROI	(Actual Incremental Revenue minus Actual Incremental COGS) divided by Actual Total Spend.
Actual Total Spend	Actual total payments.
Actual Total Revenue	(Actual Incremental Revenue plus Actual Baseline Revenue).
Actual Total Volume	Sum of the shipments.
Consumption End	Date when consumer purchases under this promotion end. This date can be after the promotion end date.
Consumption Start	Date when the products are available for purchase by consumers. If consumption information for each promotion is obtained from external databases, the start and end dates can be used to restrict the list of consumption records. This date must be within the period of the promotion.
Corporate Promotion	Name of an existing promotion created by brand or sales management, or by the key account manager. This field is automatically completed if the account has a primary account promotion profile.  Can also be a new name given to the promotion you create.
Est Baseline Revenue	Sum of Est Baseline Volume multiplied by (List Price minus Est Variable Spend Per Unit).
Est Baseline Volume	By default, the sum of all estimated baselines associated with the promoted products for the plan's promotions.  Any baseline quantity can be associated with multiple accounts, periods, or products within the plan.
Est Fixed Spend	Estimated fixed payments.
Est Fund Allocations	Sum of all deals.
Est Incremental COGS	Sum of (COGS multiplied by Est Incremental Volume).
Est Incremental Revenue	Sum of Est Incremental Volume multiplied by (List Price minus Est Variable Spend Per Unit).
Est Incremental Volume	Total incremental volume rolled up from promoted products.
Est ROI	(Est Incremental Revenue minus Est Incremental COGS) divided by Est Total Spend.
Est Total Spend	(Est Variable Spend plus Est Fixed Spend).

Field	Description
Est Total Volume	(Estimated Baseline Volume plus Estimated Incremental Volume).
Est Variable Spend	(Est Total Volume multiplied by Est Variable Spend).
Est Variable Spend Per Unit	(Est Total Volume divided by Est Variable Spend).
Lift	This field interacts with the Est Baseline Volume field. When one field is updated, the other is updated automatically.
Name	Name of the promotion.
Organization	Name of the organization executing the promotion.
Period	Time period for which the plan is active.
Phasing Enable	Indicates if phasing is enabled for the promotion. You can use phasing if you want to allocate the aggregate cost, volume, and payment information throughout the weeks of a promotion period.
Price List	The price list associated with the promotion.
Promotion End	End date for the promotion.
Promotion Start	Start date for the promotion.
Revision	Revision number.
Shipment End	Date when the shipments for this promotion end. This date cannot be after the promotion end date.
Shipment Start	Date when the shipments for this promotion can begin. This date can be before the promotion start date.
Status	Status of the plan.
Total Revenue	(Baseline Revenue plus Incremental Revenue).

## Obtaining Approvals for a Plan

A key account manager can submit a plan for multilevel approval, with each approver changing the status of the plan to signify acceptance or rejection. The end result of a completed approval process is that the status of the deals associated with the plan changes to Committed.

**NOTE:** When the status of the deals associated with a plan is Committed, the requested funds are allocated to the plan.

The two final plan status values provided in the standard product both change the status of the associated deals to Committed but differ in the following way:

- **Accepted.** Makes the plans records read-only (uneditable).

- **Presented.** Does not make the records read-only.

**NOTE:** After the status of a plan is changed to *Accepted*, it cannot be revised or modified in any way. If a key account manager anticipates the need to make changes to it, change the status to *Presented*.

### *To submit a plan*

- 1 Navigate to the Plans screen.
- 2 In the Plan List view, create a new plan record.
- 3 In the Status field drop-down list, select Pending Approval.

When a key account manager submits a plan for approval to the regional sales manager, the sales manager decides whether to accept it. If the regional sales manager approves the plan, the sales manager changes the status to *Approved-Pending Review*. When the plan has received approval from the customer, its status is changed to *Accepted* or *Presented*.

### *To revise a plan*

- 1 Navigate to the Plans screen.
- 2 In the Plan List view, select a plan record, and then click *Revise*.
- 3 Edit the fields as necessary.

## Enabling Phasing for Promotions (End User)

Key account managers can set up phasing for a promotion if they want see category and product data for the promotion on a weekly basis. You can use phasing if you want to allocate the aggregate cost, volume, and payment data throughout the weeks in the shipment period for the promotion.

To enable phasing for a promotion, you designate that the promotion uses phasing functionality, and then you set up the phasing pattern for the account in the promotion. This phasing pattern determines how category and product data is allocated throughout the weeks that you designate in the pattern.

When you enable phasing for a promotion, you automatically enable phasing for all categories and products in that promotion. You cannot disable phasing for selected categories or products in a promotion after you enable phasing for the promotion. Also, you cannot disable phasing for a promotion and for all the categories in the promotion:

- After you phase a promoted category in the promotion.
- If the Status field changes to *Paid* for a payment associated with a deal for any category in the promotion. (To find the Status field, navigate to *Promotion > Promotions List*, drill down on the *Promotion* field, drill down on the *Category* field in the *Promoted Categories* list, select the deals tab, and select the *Payments* view tab.)

After you enable phasing for a promotion, you cannot change the shipment start date and the shipment end date if the current date is after the shipment start date. Also, you cannot change the shipment start date and the shipment end date if the promotion status is Finalized.

This task is a step in [“Process of Managing Trade Promotions” on page 106](#).

***To enable phasing for a promotion***

- 1 Navigate to the Promotions screen > Promotion List view.
- 2 Select the promotion for which you want to enable phasing.
- 3 Select the check box in the Phasing Enable field.

The Phasing Enable field for all categories and products in the promotion is selected.

***To create a phasing pattern for an account in a promotion***

- 1 Navigate to the Administration - Pattern screen > Pattern Administration view.
- 2 In the Pattern list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Pattern	Name of the pattern.
Account Name	Account for the pattern. This pattern is available only to promotions for this account and the subaccounts for this account.

- 3 In the Pattern Distribution list for the pattern, create at least one new record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Sequence	A number that designates a week in the shipment period for the promotion. This field is automatically populated with a number when you create a record, but you can overwrite this number. Use 1 for the first week, 2 for the second week, and so on. You cannot use a pattern for phasing if you do not assign at least 1 sequence. The number of weeks in a pattern must be equal to or less than the number of weeks in the shipment period for which the periods are created.
Pattern Distribution	The percentage of the aggregate data that is distributed to the associated sequence week. Make sure that the pattern distribution amounts for all of the sequences in a pattern add up to 100%. You cannot use the pattern for phasing if the amounts total less than or more than 100%.



# Creating Deals for Promotions (End User)

Key account managers can create deals for promotions. For information about creating deals for promoted products, see [“Creating a Deal for a Promoted Product” on page 132](#).

This task is a step in [“Process of Managing Trade Promotions” on page 106](#).

## *To create a deal for a promotion*

- 1 Navigate to the Promotions screen > Promotion List view.
- 2 Drill down on the Promotion field hyperlink for a selected promotion, and click the Deals view tab.
- 3 In the Deals list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

Fields	Comments
Amount	Amount of the deal.
Bundle	A check in this box indicates that the deal can contain bundled products. In the standard product, this field does not drive any behavior in the application; further customization is necessary to do so.
Deal ID	System-generated identification number of the deal.
Est. Pay Date	Estimated date of the payments paid from the deal. In the standard product, this field does not drive any behavior in the application; further customization is necessary to do so.
Fund	Name of the fund from which the deal is made.
Max. Quantity	Maximum quantity to include in the deal. The default value is 1.
Min. Quantity	Minimum quantity to include in the deal. The default value is 1.
Payment Pending	The value of the payments pending for the deal.
Payment Submitted	The value of the payments submitted for the deal.
Payments Paid	The value of the payments paid for the deal.
Price Adj. Amount	Price Adjustment Amount. The amount of the price adjustment that is given with the deal. This field adds additional dimensions to the deal. In the standard product, this field does not drive any behavior in the application; further customization is necessary to do so.
Price Adj. Type	Price Adjustment Type. The type of price adjustment—for example, % Markup or Discount Amount. In the standard product, this field does not drive any behavior in the application; further customization is necessary to do so.

Fields	Comments
Stackable	Indicates that the deal is not exclusive, and it can be stacked with other existing deals. In the standard product, this field does not drive any behavior in the application; further customization is necessary to do so.
Status	Status of the deal.
Type	Type of deal, such as Bill Back, Fixed Cost, or Off Invoice. Select a value from the drop-down list.

## Working with Promoted Categories (End User)

This topic provides information about how key account managers can use promoted categories, and contains the following topics:

- [“Adding Promoted Categories to Account Promotions” on page 122](#)
- [“Phasing a Promoted Category” on page 123](#)
- [“Creating a Deal for a Promoted Category” on page 127](#)
- [“Associating Products with a Promoted Category” on page 129](#)

This task is a step in [“Process of Managing Trade Promotions” on page 106](#).

### Adding Promoted Categories to Account Promotions

A key account manager can associate a category with an account promotion. This association allows the key account manager to add all the products in the category to the account promotion. In the Promoted Categories list, a key account manager can add a category to a promotion or remove a category from the promotion. The key account manager can also maintain information that is specific to the promotion in this view.

Key account managers can also simulate the results of promoting a category by using product lift factors. For more information about promoted category simulation, see [“Simulating Promotions for Promoted Products and Categories \(End User\)” on page 112](#).

#### *To add a category to a promotion*

- 1 Navigate to the Promotions screen > Promotion List view.
- 2 Drill down on the Promotion field hyperlink for a selected promotion.  
The Promoted Categories view appears.
- 3 In the Promoted Categories list, click New to add a new promoted category.  
The Category dialog box appears.

- 4 Select a category from the Category dialog box, and then click OK.

The selected category appears in the Promoted Categories list.

## Phasing a Promoted Category

Key account managers can phase a promoted category if they want to allocate the aggregate cost, volume, and payment data for the category throughout the weeks of the shipment period for the promotion.

Before you can phase a promoted category, you must:

- **Enable phasing for the promotion.** For more information, see [“Enabling Phasing for Promotions \(End User\)” on page 119](#).
- **Create periods for the weeks to which you want to allocate category data.** If you want to begin data allocation on the start date of the promotion’s shipments, make sure a period is created for the week that contains that start date. Also make sure the periods are created for any subsequent weeks to which you want to allocate category data. You can allocate category data to weeks that are after the end date for the promotion’s shipments if periods are created for those weeks. For more information, see [“Creating Periods” on page 25](#).

If the current date is before the start date for the promotion’s shipments, you can phase all the promoted categories. If the current date is during or after the shipment period for the promotion, you can phase the promoted categories for which the Phasing Status field is Not Phased or blank.

After you phase a promoted category, you cannot disable phasing for the category’s promotion and for all categories in the promotion.

### *To phase a promoted category*

- 1 Navigate to the Promotions screen > Promotion List view.
- 2 Drill down on the Promotion field hyperlink for a selected promotion.

The Promoted Categories view appears.

- 3 Select the category that you want to phase.
- 4 Select a pattern in the Phasing Pattern field for the category.

The phasing pattern determines how category and product information is allocated during the weeks you designate in the pattern. If the phasing pattern that you want is not available for selection, you can create that pattern. To create a phasing pattern, see [“Enabling Phasing for Promotions \(End User\)” on page 119](#).

- 5 Click Phase to phase the promoted category.  
The Phasing Status field for the category changes to Phased.
- 6 Click the Category field hyperlink for the category that you phased.

- 7 Click the Phasing Result view tab to display the result of the phasing.

Regardless of when you phase a promoted category, the available data for the planned fields is allocated using the percentages for all of the weeks in the phasing pattern. The data allocated to nonplanned fields depends on when you phase the promoted category:

- **If you phase a promoted category before the shipment start date for the promotion,** the available data for nonplanned fields is allocated using the percentages for all of the weeks in the phasing pattern.

For example, if the phasing pattern is 40%, 30%, 20%, and 10%, if a nonplanned field has a value of \$100, and if you phase before the first week in the shipment period, then the phasing result for the nonplanned field is allocated as follows: \$40, \$30, \$20, \$10.

- **If you phase a promoted category during the shipment period for the promotion,** the available data for nonplanned fields is allocated as follows:

- For any weeks in the phasing pattern prior to the week that contains the current date, the nonplanned fields are not allocated any data.
- For the week in the phasing pattern that contains the current date, the nonplanned fields are allocated data using the percentages for that week and for any prior weeks in the phasing pattern.
- For any weeks in the phasing pattern subsequent to the week that contains the current date, the nonplanned fields are allocated data using the percentages for the corresponding weeks in the phasing pattern.

For example, if the phasing pattern is 40%, 30%, 20%, and 10%, if a nonplanned field has a value of \$100, and if you phase during the second week in the shipment period, then the phasing result for nonplanned field is allocated as follows: \$0, \$70, \$20, \$10.

- **If you phase a promoted category after the shipment end date for the promotion,** the available data for nonplanned fields is allocated as follows:

- For all weeks in the phasing pattern, the nonplanned fields are not allocated any data.
- For the week that contains the current date, the nonplanned fields are allocated all data.

For example, if the phasing pattern is 40%, 30%, 20%, and 10%, if a nonplanned field has a value of \$100, and if you phase in the week after the shipment period, then the phasing result for nonplanned field is allocated as follows: \$0, \$0, \$0, \$100.

**NOTE:** The logic detailed after [Step 7 on page 124](#) is meant to provide a general framework for phasing result calculations. In some scenarios and for some fields, this logic does not apply.

### Recalculating a Category's Phasing Result

To see the current phasing result for a promoted category, key account managers must recalculate the result when the Phasing Status field for the category is Refresh Required. The Phasing Status field changes to Refresh Required if:

- You change the Est Incremental Volume field for the category's promotion.
- You change the Incremental field in the category's Promoted Product Baseline list. Changing this field changes the Est Incremental Volume field for the promoted category.

- You associate baseline data with promoted products. You click the Baseline button in the Promotion List view to make this association. Making this association changes the Est Baseline Volume field for the promoted category.
- You change the Est Distribution Update Pct fields for some weeks in the phasing result for the promoted category. Your changed amounts for all weeks must add up to 100%. When you change a percentage in this field, you supersede the percentage for the corresponding week in the phasing pattern.
- Any of the following category fields change:
  - Est Total Volume
  - Est Deferred Cost
  - Est On-Invoice Cost
  - Est Fixed Cost
  - Act Ship Volume
  - Act Deferred Payment
  - Act On-Invoice Payment
  - Act Fixed Payment

These promoted category fields are calculated fields, and you cannot enter data in them. However, these fields can change if you make changes in other records (for example, deal or deal payment records).

When you recalculate the phasing result, you do not update all of the fields in the phasing result. The following fields are not updated:

- All planned fields
- All fields for the weeks that are before the week that contains the date that you recalculate the phasing result

If the current date is before the start date for the promotion's shipments, you cannot recalculate the phasing result for all the promoted categories. However, you can change the phasing pattern for a promoted category and again phase the category.

### ***To recalculate the phasing result for a promoted category***

- 1 Navigate to the Promotions screen > Promotion List view.
- 2 Drill down on the Promotion field hyperlink for a selected promotion.  
The Promoted Categories view appears.
- 3 Click the Category field hyperlink for the category for which you want to recalculate the phasing result.
- 4 Click the Phasing Result view tab to display the result of the previous phasing.

- 5 Click Recalculate to display the result of the phasing recalculation.

The Phasing Status field for the promoted category changes to Phase Updated.

Regardless of when you recalculate the phasing result for a promoted category, the planned fields for all of the weeks in the phasing pattern do not change. The change in nonplanned fields depends on when you recalculate the phasing result:

- **If you recalculate the phasing result for a promoted category during the shipment period for the promotion**, the available data for nonplanned fields is recalculated as follows:
  - For any weeks in the phasing pattern prior to the week that contains the current date, the nonplanned fields are not recalculated.
  - For the week in the phasing pattern that contains the current date, the nonplanned fields are allocated data using the percentages for that week and for any prior weeks in the phasing pattern. Then, the data in the nonplanned fields that is not recalculated for the prior weeks is subtracted from this allocation.
  - For any weeks in the phasing pattern subsequent to the week that contains the current date, the nonplanned fields are recalculated using the percentages for the corresponding weeks in the phasing pattern.

For example, if the phasing pattern is 40%, 30%, 20%, and 10%, if a nonplanned field has a value of \$100, and if you phase before the first week in the shipment period, then the phasing result for the nonplanned field is allocated as follows: \$40, \$30, \$20, \$10. If the nonplanned field value later changes to \$200, and if you recalculate the phasing result during the second week of the shipment period, then the phasing result for the nonplanned field is allocated as follows: \$40, \$100, \$40, \$20. The phased data for the first week is not recalculated. The phased data for the second week is calculated as follows: [(\$200 multiplied by .70) minus \$40]. The phased data for the third week is calculated as follows: (\$200 multiplied by .20). The phased data for the fourth week is calculated as follows: (\$200 multiplied by .10).

- **If you recalculate the phasing result for a promoted category after the shipment end date for the promotion**, the available data for nonplanned fields is recalculated as follows:
  - For the all weeks in the phasing pattern, the nonplanned fields are not recalculated.

- For the week that contains the current date, the nonplanned fields are allocated all data. Then, the data in the nonplanned fields that is not recalculated for the prior weeks is subtracted from this allocation.

For example, if the phasing pattern is 40%, 30%, 20%, and 10%, if a nonplanned field has a value of \$100, and if you phase before the first week in the shipment period, then the phasing result for the nonplanned field is allocated as follows: \$40, \$30, \$20, \$10. If the nonplanned field value later changes to \$200, and if you recalculate the phasing result in the week after the shipment period, then the phasing result for the nonplanned field is allocated as follows: \$40, \$30, \$20, \$10, \$100. The phased data for the first four weeks is not recalculated. The phased data for the fifth week is calculated as follows: [(\$200 multiplied by .100) minus \$40 minus \$30 minus \$20 minus \$10].

**NOTE:** The logic detailed after [Step 5 on page 126](#) is meant to provide a general framework for phasing result calculations. In some scenarios and for some fields, this logic does not apply.

## Creating a Deal for a Promoted Category

Key account managers can create and view a list of deals that fund a promoted category, and view information about each deal's planned and actual spending.

### *To create a deal for a promoted category*

- 1 Navigate to the Plans screen.
- 2 In the Plan List view, select the plan record containing the promoted categories.
- 3 Drill down on the Name field hyperlink.  
The Promotions list appears.
- 4 In the Promotions list, drill down on the Name field hyperlink for the promotion that contains the promoted categories.  
The Promoted Categories list appears, displaying the list of categories in the promotion.
- 5 In the Promoted Categories list, click the Category field hyperlink of the promoted category for which you want to create a deal.  
The Deals list appears.
- 6 In the Deals list, create a new record, and complete the necessary fields.  
Some fields are described in the following table.

Fields	Comments
Deal ID	System-generated identification number of the deal.
Status	Status of the deal.
Type	Type of deal, such as Bill Back, Fixed Cost, or Off Invoice. Select a value from the drop-down list.

Fields	Comments
Deal Category	<p>Type of deal category. This field is automatically populated when you select a type of deal in the Type field:</p> <ul style="list-style-type: none"> <li>■ If the type of deal is Bill Back, the deal category is Deferred.</li> <li>■ If the type of deal is Off-Invoice, the deal category is On-Invoice.</li> </ul> <p>For a Deferred or On-Invoice deal category, you can enter data in the Volume and Cost Per Case fields in the Deals list and in the Volume and Rate fields in the Payments view tab for this deal. You cannot enter data in the Amount field in the Deals list and in the Payments view tab for this deal.</p> <ul style="list-style-type: none"> <li>■ If the type of deal is Fixed, the deal category is Fixed.</li> </ul> <p>For a Fixed deal category, you can enter data in the Amount field in the Deals list and in the Payments view tab for this deal. You cannot enter data in the Volume and Cost Per Case fields in the Deals list and in the Volume and Rate fields in the Payments view tab for this deal.</p>
Fund	Name of the fund from which the deal is made.
Deal Volume	Quantity in the deal. For information about when you can enter data in this field, see the Deal Category field description.
Cost Per Case	Cost of each case in the deal. For information about when you can enter data in this field, see the Deal Category field description.
Amount	Amount of the deal. For information about when you can enter data in this field, see the Deal Category field description.
Est. Pay Date	Estimated date of the payments paid from the deal. In the standard product, this field does not drive any behavior in the application; further customization is necessary to do so.
Promoted Price	Promoted price of each item in the deal.
Retail Price	Retail price of each item in the deal.
On-Invoice Deal Amount	Amount of the deal for the on-invoice deal category.
Deferred Deal Amount	Amount of the deal for the deferred deal category.
Fixed Deal Amount	Amount of the deal for the fixed deal category.
Deal Payment Volume	Quantity that the deal payments cover.
On-Invoice Deal Payment Volume	For the on-invoice deal category, quantity that the deal payments cover.
On-Invoice Deal Payment	For the on-invoice deal category, the payments for the deal.
Deferred Deal Payment	For the deferred deal category, the payments for the deal.
Fixed Deal Payment	For the fixed deal category, the payments for the deal.



Fields	Comments
Payment Pending	The value of the payments pending for the deal.
Payment Submitted	The value of the payments submitted for the deal.
Payments Paid	The value of the payments paid for the deal.
Min. Quantity	Minimum quantity to include in the deal. The default value is 1.
Max. Quantity	Maximum quantity to include in the deal. The default value is 1.
Price Adj. Type	Price Adjustment Type. The type of price adjustment—for example, % Markup or Discount Amount. In the standard product, this field does not drive any behavior in the application; further customization is necessary to do so.
Price Adj. Amount	Price Adjustment Amount. The amount of price adjustment that is given with the deal. This field adds additional dimensions to the deal. In the standard product, this field does not drive any behavior in the application; further customization is necessary to do so.
Stackable	Indicates that the deal is not exclusive, and it can be stacked with other existing deals. In the standard product, this field does not drive any behavior in the application; further customization is necessary to do so.
Bundle	A check in this box indicates that the deal can contain bundled products. In the standard product, this field does not drive any behavior in the application; further customization is necessary to do so.
Phasing Enable	Indicates if phasing is enabled for the promotion. You can use phasing if you want to allocate throughout the weeks of a promotion period the aggregate cost, volume, and payment information for that period.

## Associating Products with a Promoted Category

You can associate a product with a promoted category in a manual or automated fashion.

### *To manually add a product to a promoted category*

- 1 Navigate to the Promotions screen > Promotion List view.
- 2 Drill down on the Promotion field hyperlink for a selected promotion.  
The Promoted Categories view appears.
- 3 Select the category to which you want to add a product.
- 4 In the Promoted Products list, click New.  
A new record appears in the Promoted Products list.

- 5 In the Product field, click the select button.  
The Pick Product dialog box appears.
- 6 Select a product, and then click OK.  
The selected product appears in the Promoted Products list.

### *To automatically add products to a promoted category*

- 1 Navigate to the Promotions screen > Promotion List view.  
The Promotion List view appears.
- 2 Drill down on the Promotion field hyperlink for a selected promotion.  
The Promoted Categories view appears.
- 3 Select the category to which you want to add a product.
- 4 In the Promotion List view form, click Products.  
The Promoted Products list is populated with products. For more information about the products that are added, see ["User Properties" on page 142](#).

## Working with Promoted Products (End User)

This topic details how key account managers can use promoted products, and contains the following topics:

- ["Phasing a Promoted Product" on page 130](#)
- ["Creating a Deal for a Promoted Product" on page 132](#)
- ["Associating Baseline and Shipment Data with Promoted Products" on page 132](#)

This task is a step in ["Process of Managing Trade Promotions" on page 106](#).

### Phasing a Promoted Product

Key account managers can phase a promoted product if they want to allocate the aggregate cost, volume, and payment data for the product throughout the weeks in the shipment period for its promotion. Before you can phase a promoted product, you must phase the promoted category. For more information, see ["Phasing a Promoted Category" on page 123](#).

When you phase a promoted product, you allocate to the product a percentage of the phasing result for the product's promoted category. This percentage is calculated as follows:

Est Baseline Volume field of Promoted Product divided by Est Baseline Volume field of Promoted Category

This percentage is applied to the phasing result for the promoted category to obtain the phasing result for the promoted product.

All the phasing result fields for a promoted category, except the Est Distribution Update Pct field, display when you phase a promoted product. The phasing result fields that are percentages display the same amounts for a promoted category and its promoted products.

### ***To phase a promoted product***

- 1 Navigate to the Promotions screen > Promotion List view.
- 2 In the Promotions list, drill down on the Name field hyperlink for the promotion that contains the promoted product.  
The Promoted Categories list appears, displaying the list of categories in the promotion.
- 3 In the Promoted Categories list, select the category that contains the promoted product that you want to phase.  
The promoted products appear in the Promoted Products list.
- 4 In the Promoted Products list, select a product that you want to phase.
- 5 Click Phase to phase the promoted product.
- 6 Click the Product field hyperlink for the product that you phased.
- 7 Click the Product Phasing view tab to display the result of the phasing.

## **Recalculating a Product's Phasing Result**

When the phasing result for a promoted category is recalculated, any prior phasing result for the products in that category is deleted. If key account managers recalculate the phasing result for a promoted category, to see the current phasing result for promoted products in that category, they must recalculate the phasing result for those products. For more information, see ["Recalculating a Category's Phasing Result" on page 124](#).

### ***To recalculate the phasing result for a promoted product***

- 1 Navigate to the Promotions screen > Promotion List view.
- 2 Drill down on the Promotion field hyperlink for a selected promotion.  
The Promoted Categories view appears.
- 3 In the Promoted Categories list, select the category that contains the promoted product for which you want to recalculate the phasing result.  
The promoted products appear in the Promoted Products list.
- 4 In the Promoted Products list, click the Product field hyperlink for the product for which you want to recalculate the phasing result.
- 5 Click the Product Phasing view tab to display the result of the previous phasing.
- 6 Click Recalculate to display the result of the phasing recalculation.

## Creating a Deal for a Promoted Product

Key account managers can create and view a list of deals that fund a promoted product, and view information about each deal's planned and actual spending.

**NOTE:** A deal for a promoted product rolls up to a promotion only when it is created for a promoted product that is already associated with a promotion. If a deal is added to a product that is not associated with a promotion, the deal does not roll up to the promotion if the product is later associated with a promotion.

### *To create a deal for a promoted product*

- 1 Navigate to the Plans screen.
- 2 In the Plan List view, select the plan record containing the promoted products.
- 3 Drill down on the Name field hyperlink.  
The Promotions list appears.
- 4 In the Promotions list, drill down on the Name field hyperlink for the promotion that contains the promoted products.  
The Promoted Categories list appears, displaying the list of categories in the promotion.
- 5 In the Promoted Categories list, select the category that contains the promoted products for which you want to create or view a deal.  
The promoted products appear in the Promoted Products list.
- 6 In the Promoted Products list, drill down on the Product field hyperlink for the product for which you want to create or view a deal.  
The Deals list appears.
- 7 In the Deals list, create a new record, and complete the necessary fields.  
Some fields are described in [Step 3 on page 121](#).

## Associating Baseline and Shipment Data with Promoted Products

Key account managers can associate baseline and shipment data with promoted products. Baseline and shipment data can be associated only with promoted products and cannot be directly associated with a promotion.

A baseline record or a shipment record can be associated with more than one promoted product. For example, if you add the same product to two promotions, each for the same account and each with the same promotion end dates, you create two promoted products that share the same baseline and shipment record.

## Promotion Planning Controls

The promotion planning process uses controls to enhance usability for key account managers.

When you navigate to the Promotion List view (Promotions screen > Promotion List view), the following controls exist:

- **Revise.** Creates a copy of the active record, incrementing the value in the Revision field by 1.
- **Products.** Adds products as promoted products of the promotion. For more information about the products that are added, see [“User Properties” on page 142](#).
- **Baseline.** Associates baseline records based on account, promoted product, and promotion start and end dates. Baseline data is adjusted for partial weeks. Then, a user can add incremental volume to each baseline record.
- **Spread.** Spreads the estimated incremental volume across the intersection baseline records, based on the following formula.

Estimated Incremental volume multiplied by (Promotion baseline of the intersection baseline record divided by the total baseline for the promotion).

If the number of records within a promotion hierarchy change (for example, a promoted category is deleted), you must click the Spread button again to redistribute the data across the remaining records.

**NOTE:** After an incremental volume is entered for a promotion and the volume is evenly distributed (to the nearest whole dollar) to the baseline records for promoted products, the remainder is randomly distributed to the baseline records for promoted products.

**CAUTION:** If the user prefers to use another method for spreading volume, further configuration is required.

For information about how to configure the Spread button, see [“Configuring the Spread Button” on page 138](#).

- **Shipment.** Associates shipment records based on account, promoted product, and shipment start and end dates. Shipment data is adjusted for partial weeks.
- **Aggregate.** Aggregates the values in the Incremental field in the Promoted Product Baseline list for promotions. For each product that is associated with a given account, the values in the Incremental field are summed up for all existing promotions. Then, the Incremental Qty field for the product in the Product Baseline list in Sales Volume Planning is updated with this summarized value. Then, the summarized value is aggregated up the entire category hierarchy (not up the account hierarchy) in Sales Volume Planning.

All buttons and methods for Trade Promotions Configurators are described in [Table 16 on page 141](#).

### *To associate baseline and shipment data with promoted products*

- 1 Navigate to the Promotions screen > Promotion List view.

- 2 Select a record in the Promotion List, click Baseline, and then click Shipment.

The system identifies all baseline records that exist during the promotion Start and End periods for that account and promoted product, and associates these records with the promoted product.

Baseline and shipment data are adjusted for partial weeks.

**NOTE:** Use the Baseline button before the promotion. Use the Shipment button after the promotion to evaluate the promotion.

- 3 Drill down on the Promotion field hyperlink.

The Promoted Categories list appears.

- 4 Select the category that contains the promoted product or products with which you want to associate baseline and shipment data.

- 5 In the Promoted Products list, select a product record.

The Promoted Product Baseline view displays all baseline data for all periods that fall between the shipment start date and the shipment end date for the account and the selected product.

- 6 Drill down on the Product field hyperlink, then click the Shipments view tab.

The Shipments view displays all shipment data for all periods that fall between the shipment start date and the shipment end date for the account and the selected product.

Some fields are described in the following table.

Field	Comment
Shipment	The quantity associated with sales volume without a promotion.
%	Promotion Shipment Percent. An adjustment made when the first or last week of a promotion is not the same duration as a full week in the corresponding shipments record.
Promotion Shipment	The quantity derived by multiplying Shipment times percent.

- 7 Navigate back to the Promoted Product Baseline list and enter values in the Incremental field for each period in the promotion.

These values are rolled up into the estimated incremental value for the promoted product, the promotion, and the plan.

Some fields are described in the following table.

Field	Comment
Baseline	The quantity associated with sales volume without a promotion.
%	Promotion Baseline Percent. An adjustment made when the first or last week of a promotion is not the same duration as a full week in the corresponding baseline.
Promotion Baseline	The quantity derived by multiplying Baseline times percent.

# Working with Promotions (End User)

This topic details how key account managers can use promoted products, and contains the following topics:

- [“Adding Attachments to Promotions” on page 135](#)
- [“Associating Objectives with Promotions” on page 135](#)
- [“Committing Target Account Lists to a Corporate Promotion” on page 136](#)
- [“Creating Promotions for an Account” on page 136](#)
- [“Finalizing a Promotion” on page 137](#)

This task is a step in [“Process of Managing Trade Promotions” on page 106](#).

## Adding Attachments to Promotions

Key account managers can view attachments and attach documents, such as proof of performance, to account plan promotions.

### *To add attachments to a promotion*

- 1 Navigate to the Promotions screen > Promotion List view.
- 2 Drill down on the Promotion field hyperlink for a selected promotion, and click the Attachments view tab.
- 3 In the Attachments list, add a new attachment record.
- 4 Click the Name field select button.
- 5 In the Add Attachment dialog box, select an attachment, and click Add.  
In the Attachments list, the selected attachment appears.

## Associating Objectives with Promotions

Key account managers can associate objectives with account promotions. Objectives provide goals for promotions.

### *To associate objectives with promotions*

- 1 Navigate to the Promotions screen > Promotion List view.
- 2 Drill down on the Promotion field hyperlink for a selected promotion, and click the Objectives view tab.
- 3 In the Objectives list, create a new record.
- 4 Click the Objective field select button, select an objective from the dialog box, and click OK.

- 5 Complete the additional necessary fields.

## Committing Target Account Lists to a Corporate Promotion

You can commit target account lists to a corporate promotion. The target accounts that are available are those that belong to the organization of which the user is an account team member.

**NOTE:** In the Target Accounts view, you can commit target accounts to a promotion whether or not you are connected to a network.

### *To commit a target account to a corporate promotion*

- 1 Navigate to the Corporate Promotions screen.
- 2 Select a promotion record.

The corporate promotion you select acts as a template for the account promotion you are creating when you assign target accounts to that corporate promotion.
- 3 In the Promotions list, drill down on the Promotion field hyperlink.
- 4 Click the Target Accounts view tab and choose the action that corresponds to your situation:
  - **If you are connected to a network.** Query for the accounts to which you want to target the promotion.
  - **If you are not connected to a network.** Perform one of the following actions:
    - Query for accounts you want to target.
    - On the toolbar, click the Apply Target List button, located on the extreme left of the toolbar. Select one or more target accounts in the Apply Target List dialog box, and click OK.
- 5 Select one or more accounts in the Target Accounts list, and click Commit.

The selected target accounts appear in the sublevel Accounts list and are now committed to the corporate promotion. You have also created an account promotion that is based on the corporate promotion template.

## Creating Promotions for an Account

Key account managers can create promotions for individual accounts that are not part of plans. They add products to the promotions and create deals to cover the cost of the promotions.

Key account managers can use corporate promotions as a template to create their account promotions. The corporate promotion can be used as many times as needed.

Key account managers have the option of associating the promotion with a corporate promotion, in which case the promotion inherits the attributes of the corporate promotion.



Promotions are established and run for categories of products. Key account managers can simulate promotions using category lift factors. For information about promotion simulation, see [“Simulating Promotions for Promoted Products and Categories \(End User\)”](#) on page 112.

### *To create promotions for accounts*

- 1 Navigate to the Promotions screen > Promotion List view.
- 2 Create a new account promotion record.
- 3 In the Promotion field, enter a name for the account promotion record.
 

**NOTE:** In the Corporate Promotion field, either leave the field blank or select a corporate promotion from the drop-down list. If you select a corporate promotion, the account promotion record inherits the corporate promotions attributes.
- 4 In the Account field, select an account record to associate with the promotion.
- 5 Complete the necessary fields.
 

See [Step 3 on page 116](#) for a description of the fields.

## Finalizing a Promotion

Key Account Managers can finalize promotions if they are using phasing functionality. After the shipment period for a promotion and after applicable payments have been associated with the promotion, you can finalize the phasing result for the promotion. In general, you finalize the phasing result after the shipment period, not before or during the shipment period.

When you finalize the phasing result for a promotion, promoted categories and promoted products are phased if they were not previously phased. Also, promoted categories and promoted products are recalculated if data that affects the phasing result has changed since the last phasing. After you finalize the phasing result, no one can recalculate that result even if the data that affects it changes.

To finalize the phasing result for all the categories and products in a promotion, you change the Status field for the promotion to Finalized. If you later decide to update the phasing result with data that changes after finalization, you can change the promotion Status field to Re-opened, and then recalculate the phasing result.

Regardless of the value in the Phasing Enable field for a promotion, if you change the promotion's Status field to Finalized or Re-opened, the Status field for all categories and products in the promotion automatically changes to Finalized or Re-opened. If the Phasing Enable field is selected and you change the promotion's Status field to Finalized, you cannot add to or delete from the promotion any categories, products, deals, or payments. The Phase and Recalculate buttons are disabled, and the following promotion buttons are disabled: Revise, Products, Baseline, Spread, Shipment, and Aggregate.

### *To finalize a promotion*

- 1 Navigate to the Promotions screen > Promotions List view.
 

The Promotion List view appears.

- 2 Select the promotion that you want to finalize.
- 3 Change the Status field to Finalized.

## About Configuring Trade Promotions

The following topic contains information that might be useful to configurators making changes to the promotions features. Topics include:

- [“Configuring the Spread Button” on page 138](#)
- [“Retaining Account Promotions When Deleting Corporate Promotions” on page 140](#)
- [“Specialized Methods Invoked” on page 141](#)
- [“User Properties” on page 142](#)
- [“Products Button” on page 143](#)

### Configuring the Spread Button

A configurator can use Siebel Tools to specify how to spread data from one level to another level of the promotion hierarchy when a user clicks Spread in the application.

How the configurator specifies the spread of data varies according to the following scenarios:

- For a business component within the promotion hierarchy, add user properties to the source business component in Siebel Tools as described in [Table 13](#).

Table 13. User Properties for the Source Business Component

Name of User Property	Values to Enter
CS Spread Target: <i>BO Name</i> Where <i>BO Name</i> is the name of the business object. For example, CS Spread Target: CPG Plan	Name of the target business component. For example, CS CG Plan Account Promotion Category
CS Spread Fields: <i>BO Name N</i> Where <i>BO Name</i> is the name of the business object and <i>N</i> is a number. For example, CS Spread Fields: CPG Plan 1	"[Source Field Name]", "[Target Field Name]", "[Method to use]", "[Name of the field used to calculate the percentage when allocating]" For example, "Est Incremental Cases", "Est Incremental Cases", "Allocate", "Est Baseline Cases"

- For a business component within the promotion hierarchy, modify the user properties of the RollUp Fields as described in [Table 14](#).

Table 14. User Properties for the RollUp Fields

Name of User Property	Values to Enter
CS RollUp Fields: <i>BO Name N</i> Where <i>BO Name</i> is the name of the business object and <i>N</i> is a number. For example, CS RollUp Fields: CPG Plan 3	"[Source Field Name]", "[Target Field Name]", Spread For example, "Est Incremental Revenue", "Est Incremental Revenue", Spread

- For a nonroot business component (the root business component is the business component from which the Spread button is invoked), add the following extra business component user property as described in [Table 15](#).

Table 15. User Property for Nonroot Business Component

Name of User Property	Values to Enter
CS Spd Rt: <i>BO Name/Root BC</i> Where <i>BO Name</i> is the name of the business object and <i>Root BC</i> is the name of the root business component. For example, CS Spd Rt: CPG Plan/CPG Plan Account Promotion	Name of the field that links this business component to the root business component. For example, Plan Account Promotion Id

For each of the previously described scenarios, note the following points:

- The target business component has to be a child business component of the business object that is linked to the current business component through a one-to-many link.
- Only the RollUp user properties that are modified in [Table 14](#) participate in a roll up triggered by the Spread button.
- The target field must be column-based.
- Use either the Allocate or Copy method.
  - If you use the Allocate method, the source and target fields must be numeric.
  - If you use the Copy method, the source and target fields do not have to be numeric.

For instructions about modifying links and business components, see the *Configuring Siebel Business Applications*.

## Retaining Account Promotions When Deleting Corporate Promotions

When administrators delete a corporate promotion, the associated account promotions are automatically deleted. To retain account promotions, you must modify a link and a business component using Siebel Tools.

For instructions about modifying links and business components, see the *Configuring Siebel Business Applications*.

### *To retain account promotions when deleting associated corporate promotions*

- 1 Open Siebel Tools.
- 2 In the Object Explorer, select Link.
- 3 In the Links list, select CPG Promotion/CPG Plan Account Promotion.
- 4 In the Cascade Delete column, select Clear.
- 5 In the Object Explorer, open the Business Component folder and select the Multi Value Link subfolder.
- 6 In the Business Components list, select CPG Promotion.
- 7 In the Multi Value Links list, select CPG Plan Account Promotion.
- 8 In the No Delete column, select True.

## Specialized Methods Invoked

The procedures documented in this chapter include buttons that invoke specialized methods, as described in [Table 16](#).

Table 16. Buttons And Methods For Trade Promotions Configurators

Button	Name of Method	Description	Supported On
Aggregate	CatAggregate DoCatAggregate	Aggregates the values in the Incremental field in the Promoted Product Baseline list for promotions. For each product that is associated with a given account, the values in the Incremental field are summed up for all existing promotions. Then, the Incremental Qty field for the product in the Product Baseline list in sales volume planning is updated with this summarized value. Then, the summarized value is aggregated up the entire category hierarchy (not up the account hierarchy) in sales volume planning.	Bus Comp Layer
Baseline	OnBaselineData	Associates baseline records based on account, promoted product, and promotion start and end dates. Baseline data is adjusted for partial weeks. Then, a user can add incremental volume to each baseline record.	Bus Comp Layer
Commit	CommitAcct	Writes account names from temporary targeting tables to permanent tables where promotions are stored.	Applet Layer
Intersection	ButtonIntersection	Intersection of lists.	Applet Layer
Phase (Promoted Categories)	CreatePhaseData ForCategory	Calculates and displays phasing results for a promoted category.	Bus Comp Layer
Phase (Promoted Products)	CreatePhaseData ForProduct	Calculates and displays phasing results for a promoted product.	Bus Comp Layer
Products	OnCatalogProducts	Finds products associated with the chosen category for a promotion and adds them as promoted products of the promotion.	Bus Comp Layer
Recalculate (Promoted Categories)	RecalcPhaseData ForCategory	Recalculates and displays phasing results for a promoted category.	Bus Comp Layer

Table 16. Buttons And Methods For Trade Promotions Configurators

Button	Name of Method	Description	Supported On
Recalculate (Promoted Products)	RecalcPhaseData ForProduct	Recalculates and displays phasing results for a promoted product.	Bus Comp Layer
Revise	OnPromoRevise	Revises promotion.	Bus Comp Layer
Shipment	OnShipmentData	Associates shipment records based on account, promoted product, and shipment start and end dates. Shipment data is adjusted for partial weeks.	Bus Comp Layer
Simulate (Promotions)	SimulateCategory	Simulates the promotion based on category lift factors.	Bus Comp Layer
Simulate (Promoted Products)	SimulateProduct	Simulates a promoted product based on product lift factors.	Bus Comp Layer
Spread	OnSpread	Spreads the estimated incremental across the intersection baseline records. For more information, see <a href="#">“Associating Baseline and Shipment Data with Promoted Products”</a> on page 132.	
Union	ButtonUnion	Union of lists.	Applet Layer

## User Properties

The following user properties are used by Trade Promotions:

- **Use ADL.** This is a user property of the CPG Plan Account Promotion Products business component. The value of this property determines the products that are added to a promotion when a user clicks the Products button in the Promotions screen > Promotion List view.
  - If the value is set to Y, the products that are associated with the chosen category for a promotion and that are on the account’s authorized distribution list are added.
  - If the value is set to N, the products that are associated with the chosen category for a promotion are added.

- **Baseline Dates.** This is a Business Component object type user property on the CPG Plan Account Promotion Product view. This user property determines the Start and End dates used to associate baseline data to a promotion. [Table 17](#) describes how using different Values with this user property affects the Start and End dates.

Table 17. Baseline Date Values and Behaviors

Value	Behavior
Promotion	Uses the promotion Start and End dates.
Consumption	Uses the consumption Start and End dates.
Shipment	Uses the shipment Start and End dates.

When the user property is not used, the default behavior is equal to using Promotion.

For more information about user properties, see the *Using Siebel Tools*.

## Products Button

In the Promotion form in the Promotions screen > Promotion List view, the Products button invokes the CPG Plan Account Promotion Product business component.





# 9

## Trade Funds

This chapter covers the procedures necessary to set up and assign funds to promotions and promoted products. Topics include:

- ["About Consumer Goods Funds" on page 145](#)
- ["Scenario for Managing Consumer Goods Funds for Promotions" on page 146](#)
- ["Process of Managing Trade Funds" on page 146](#)
- ["Creating a Fund" on page 147](#)
- ["Adding a Child Fund to a Parent Fund" on page 150](#)
- ["Adjusting a Fund" on page 151](#)
- ["Reviewing Deals" on page 151](#)
- ["Reviewing Fund Payments" on page 153](#)
- ["Reconciling a Deal" on page 154](#)
- ["Closing a Deal" on page 154](#)
- ["Forecasting Accrual Funds \(End User\)" on page 154](#)
- ["Transferring Fund Amounts \(End User\)" on page 156](#)
- ["Approving a Fund Transfer \(End User\)" on page 156](#)
- ["Submitting Payments Against Funds \(End User\)" on page 157](#)
- ["Reviewing Funds, Deals, and Payments \(End User\)" on page 158](#)
- ["About Configuring Information for Consumer Goods Funds" on page 160](#)

### About Consumer Goods Funds

A *fund* is a named appropriation of money to be spent on promotions over a specific period of time for specific accounts and specific categories and products. There are two types of funds: fixed and accrual. *Fixed* funds are fixed amounts of money allocated in a lump sum. *Accrual* funds are funds in which the amount of money is calculated based on product movement.

Marketing administrators set up funds and allocate larger funds into child funds for use by key account managers. Key account managers can manage funds, including creating deals for promotions, submitting payments against deals, and tracking fund activities.

## Scenario for Managing Consumer Goods Funds for Promotions

This scenario is an example of a process performed by marketing administrators and key account managers (KAMs). Your company might follow a different process according to its business requirements.

A large beverage manufacturing company has developed a new category of fruit-flavored beverages. The KAM plans to run a promotion at the account with a feature and display of the new category. To pay for the promotion, the KAM uses funds established by the marketing administrator. The KAM sets aside funds to pay for the promotion by creating a deal for the feature and display.

After the promotion has run, the KAM submits payments against the deal to pay for the promotion. Funds are typically created by marketing administrators for use by KAMs.

## Process of Managing Trade Funds

This topic lists the tasks typically performed by administrators and end users when managing consumer goods funds. Your company might follow a different process according to its business requirements.

### Administrator Procedures

The following list shows tasks administrators typically perform to manage trade funds:

- 1 "Creating a Fund" on page 147
- 2 "Adding a Child Fund to a Parent Fund" on page 150
- 3 "Adjusting a Fund" on page 151
- 4 "Reviewing Deals" on page 151
- 5 "Reviewing Fund Payments" on page 153
- 6 "Reconciling a Deal" on page 154
- 7 "Closing a Deal" on page 154

### End-User Procedures

The following list shows tasks end users typically perform to access and use trade funds information:

- "Forecasting Accrual Funds (End User)" on page 154
- "Transferring Fund Amounts (End User)" on page 156
- "Approving a Fund Transfer (End User)" on page 156
- "Submitting Payments Against Funds (End User)" on page 157
- "Reviewing Funds, Deals, and Payments (End User)" on page 158

## Creating a Fund

Marketing administrators create funds for use by key account managers. Funds can be manually created by marketing administrators or automatically generated using fund groups. Fund groups are used to hold created funds and have generic information that administrators can apply when generating a fund. There are two types of funds, fixed and accrual, that can be created by marketing administrators.

This task is a step in [“Process of Managing Trade Funds” on page 146](#).

### Creating a Fixed Fund

Fixed funds have a predetermined amount (for example, \$5,000) allocated in a lump sum that can be used over a specified period of time. Administrators can manually create or automatically generate fixed funds. Automatically generated fixed funds are usually created for accounts from the same organization. Manually created fixed funds are created for single accounts.

#### *To manually create a fixed fund*

- 1 Navigate to the Administration - Data screen > Funds list view.
- 2 In the Funds list, create a new fund record, and complete the fields.

Some fields are described in the following table.

Field	Comments
Account	The account that is eligible for the fund. This is a required field.
Fund	The name of the new fund. This is a required field.
Type	Choose Fixed in this field. This is a required field.
Amount	The amount of money dedicated to this fund.
Target Category	The category of Products from which the target products are to be chosen. The Target Products are the products that your company wants to promote in this trade promotion.
Period	The period of time for which this fund group, and its funds are valid for use. This is a required field.
Organization	The umbrella organization for the account that is eligible for this account. For more information about organizations and accounts, see <a href="#">Chapter 4, “Managing Accounts”</a> , and <i>Siebel Applications Administration Guide</i> . This is a required field.

- 3 Save the record.

#### *To automatically generate a fixed fund*

- 1 Navigate to the Administration - Data screen > Fund Groups list view.

- In the Fund Groups list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Name	The name of the fund group. This is a required field.
Type	The type of fund, that is, Fixed or Accrual. This is a required field.
Period	The period of time for which this fund group, and its funds are valid for use. This is a required field.
Basis	The value used to accrue funds (for example, Cases or Revenue). You do not need to complete this field for Fixed Funds.
Basis Period	The period of time for which the basis is valid. You do not need to complete this field for Fixed Funds.
Source Category	The category with associated products that generate accruals. You do not need to complete this field for Fixed Funds.
Target Category	The category of Products from which the target products are to be chosen. The Target Products are the products that your company wants to promote in this trade promotion.
Amount	The total amount of money set aside for this fund group. This is divided between different accounts depending on the percentage designated to each account.
Organization	The umbrella organization for the accounts to be entered in this fund group. The accounts that you can choose for this fund group depend on the organization that you choose here. For more information about organizations and accounts, see <a href="#">Chapter 4, "Managing Accounts"</a> and <i>Siebel Applications Administration Guide</i> . This is a required field.

- Scroll down to the Accounts list, and click Apply to add eligible accounts to the fund.
- From the Pick Account pop-up dialog box, select the account records to be added, or click Select All to add all eligible account records.

To be eligible, an account must have the following attributes:

- The account has the same organization as the fund group.
- The account has the Fund Eligible field checked.

**NOTE:** To verify that the Fund Eligible field is checked, navigate to the Accounts screen > Accounts List view.

- Fill in the Percentage field for each account record.

The value in the Percentage field determines how much of the associated Fund (specified in the Amount field for the Fund Group) is allocated to the account.

- Click the Target Products view tab.

- 7 In the Target Products list, click Products.

All products of the target category and any subcategories are automatically listed. The Target Products are the products that your company wants to promote in this trade promotion.

- 8 Click the Accounts view tab, and in the Funds list, click Generate.

Fixed funds are created based on the fund group and the accounts.

## Creating an Accrual Fund

Accrual funds are calculated by product sales (for example, \$1.50 per case multiplied by 5000 cases sold equals \$7,500). When established, they can be used over a specified period of time. Administrators can manually create or automatically generate accrual funds.

### *To manually create an accrual fund*

- 1 Navigate to the Administration - Data screen > Funds view.
- 2 In the Funds list, create a new fund record, and complete the fields.

Some fields are described in the following table.

Field	Comments
Account	The account that is eligible for the fund. This is a required field.
Fund	The name of the new fund that you are creating. This is a required field.
Type	Choose Accrual in this field. This is a required field.
Source Category	The category with associated products that generate accruals.
Target Category	The category with associated products that can use the fund.
Period	The period of time for which this fund is valid for use. This is a required field.
Basis	The value used to accrue funds (for example, Cases or Revenue).
Basis Period	The period of time for which the basis is valid.
Organization	The umbrella organization for the account that is eligible for this account. For more information about organizations and accounts, see <a href="#">Chapter 4, "Managing Accounts"</a> and <i>Siebel Applications Administration Guide</i> . This is a required field.

- 3 Save the record.

### *To automatically generate an accrual fund*

- 1 Navigate to the Administration - Data screen > Fund Groups view.
- 2 In the Fund Groups list, create a new record.

- 3 Click the Type field drop-down list, and select Accrual.
- 4 Complete the remaining fields.
- 5 In the Accounts list, click Apply to add eligible accounts to the fund.
- 6 From the Pick Account pop-up dialog box, select the account records to add, or click Select All to add all eligible account records.

To be eligible, an account must have the following attributes:

- The account has the same organization as the fund group.
- The account has the Fund Eligible field checked.

**NOTE:** To verify that the Fund Eligible field is checked, navigate to the Accounts screen > Accounts List view.

- 7 Click the Target Products view tab.
- 8 In the Target Products list, click Products.

All products of the target category and any subcategories are automatically listed.

- 9 Click the Source Products view tab.
- 10 In the Source Products list, click Products.

All products of the source category and any subcategories are automatically listed. The source products are those products that are used to generate accruals.

- 11 Click the Accounts view tab.
- 12 In the Funds list, click Generate.

Accrual funds are created based on the fund group and the accounts.

**NOTE:** The Accrual field is not exposed on the Administration - Products view. To set the Accrual rate for a product, therefore, you must expose this field on the Product Business Component. You can do this in Siebel Tools.

## Adding a Child Fund to a Parent Fund

The Funds module supports an infinite funds hierarchy. For example, a parent fund can have child funds, which in turn can have child funds. This capability allows marketing administrators to break up into smaller funds those fund records that have been transferred from an external database through Siebel Enterprise Integration Manager (EIM).

This task is a step in ["Process of Managing Trade Funds" on page 146](#).

### *To add a child fund to a parent fund*

- 1 Navigate to the Administration - Data screen > Funds view.
- 2 In the Funds list, select the required parent fund record.
- 3 Click the Child Funds view tab.

- 4 In the Child Funds list, create a new record, and complete the necessary fields.

#### ***To add a grandchild fund to a fund***

- 1 Navigate to the Administration - Data screen > Funds view.
- 2 In the Funds list, select the required parent fund record.
- 3 Click the Child Funds view tab.
- 4 Select a child record.
- 5 In the Child Funds list, drill down on the Fund field hyperlink.  
In the Funds list, the child fund record appears.
- 6 In the Child Funds list, create a new record (the grandchild fund), and complete the necessary fields.

## Adjusting a Fund

You can adjust the amount of a fund (either positively or negatively) after the fund has been created. Typically, this is done to reflect changes in market conditions.

This task is a step in [“Process of Managing Trade Funds” on page 146](#).

#### ***To create an adjustment for a fund***

- 1 Navigate to the Administration - Data screen > Funds view.
- 2 In the Funds list, select a fund record.
- 3 Click the Adjustments view tab.
- 4 In the Adjustments list, create a new record.
- 5 In the Amount field, enter the negative or positive amount by which the Fund Amount is to be adjusted, for example, 5000 or -5000.
- 6 Enter a description of the adjustment, for example, the description can be the reason for the adjustment.

The new amount of money available in the fund is now reflect in the Sub-Total field on the More Info tab for the fund.

## Reviewing Deals

You can review a deal for a promotion or for a promoted product, or review all the deals that have been created against a fund.

This task is a step in [“Process of Managing Trade Funds” on page 146](#).

**To review a deal for a promotion**

- 1 Navigate to the Promotions screen > Promotion List view.
- 2 Drill down on the Promotion field hyperlink for the required promotion, and click the Deals view tab.
- 3 Select the deal record you want to review, review the available fields.

**NOTE:** The Deals view displays deals for the promotion and any deals for promoted products that belong to the promotion.

Some fields are described in the following table.

Field	Comments
Amount	The amount of the deal.
Bundle	A check in this box indicates that the deal can contain bundled products. In the standard product, this field does not drive any behavior in the application; further customization is necessary to do so.
Deal ID	System-generated identification number of the deal.
Est. Pay Date	Estimated Pay Date. Estimated date of payments paid from the deal. In the standard product, this field does not drive any behavior in the application; further customization is necessary to do so.
Fund	Name of the fund from which the deal is made.
Max. Qty	The maximum quantity covered by the deal. In the standard product, this field does not drive any behavior in the application; further customization is necessary to do so.
Min. Qty	The minimum quantity covered by the deal. In the standard product, this field does not drive any behavior in the application; further customization is necessary to do so.
Payments Paid	The amount of payments that have been paid for the deal.
Payments Pending	The amount of pending payments for the deal.
Payments Submitted	The amount of payments that have been submitted for the deal.
Price Adj. Amt	Price Adjustment Amount. The amount of price adjustment that is given. This field adds additional dimensions to the deal. In the standard product, this field does not drive any behavior in the application; further customization is necessary to do so.
Price Adj. Type	Price Adjustment Type. The type of price adjustment—for example, % Markup or Discount Amount. In the standard product, this field does not drive any behavior in the application; further customization is necessary to do so.



Field	Comments
Stackable	Indicates that the deal is not exclusive, and can be stacked with other existing deals. In the standard product, this field does not drive any behavior in the application; further customization is necessary to do so.
Type	Type of deal, such as Bill Back, Fixed Cost, or Off Invoice.

- 4 Scroll down to the Payments tab and examine payments made for this deal.
- 5 Click the Bundled Products view tab to examine details of the bundled products.

### ***To review a deal for a promoted product***

- 1 Navigate to the Promotions screen > Promotion List.
- 2 In the Promotion List, query for the required promotion, and click the link in the Promotion field.  
You are navigated to the Account Promotions list.
- 3 Scroll down to the Promoted Categories list, and select the required category.
- 4 Scroll down to the Promoted Products list, select the required product, and click the link in the Product field.  
You are navigated to the Promoted Products List.
- 5 Scroll down to the deals list, review the required deal.

### ***To review deals created for a fund***

- 1 Navigate to the Administration - Data screen > Funds view.
- 2 In the Funds list, select a fund record.
- 3 Click the Deals view tab.  
The deals that have been created from the fund and the payments from the fund appear.

## **Reviewing Fund Payments**

You can review all payments made against particular funds.

This task is a step in [“Process of Managing Trade Funds” on page 146](#).

### ***To review fund payments***

- 1 Navigate to the Administration - Data screen > Funds view.
- 2 In the Funds list, select the required fund record.

- 3 Click the Payments view tab.

The Payments list displays all payments made against the fund.

## Reconciling a Deal

You can reconcile deal amounts against all payments for that particular deal.

This task is a step in ["Process of Managing Trade Funds" on page 146](#).

### *To reconcile a deal to the associated payments*

- 1 Navigate to the Administration - Data screen > Fund Deals view.
- 2 In the Fund Deals list, select the required deal record.
- 3 Click Release Commitments.

The deal amount is updated to the sum of all payments.

## Closing a Deal

You can close a deal when you want to prevent any future payments from being made against the deal.

**NOTE:** If you plan to reconcile and close the same deal, reconcile the deal before you close it. See ["Reconciling a Deal" on page 154](#).

This task is a step in ["Process of Managing Trade Funds" on page 146](#).

### *To close a deal*

- 1 Navigate to the Administration - Data screen > Fund Deals view.
- 2 In the Fund Deals list, select the required deal record.
- 3 From the Status field drop-down list, select Closed.

The deal is closed and no further payments can be made against the deal.

## Forecasting Accrual Funds (End User)

Key account managers or administrators might want to be able to forecast the amount of revenue that will be generated from an accrual fund. They can do this through any of the Administration Fund views or through the Funds view for an account. The forecast calculation is based on SVP baseline records that are associated with the fund. The user clicks the Forecast button and the appropriate SVP baseline records and calculates the total estimated shipment that is used to forecast the accrual fund. The baseline records that are used are dependent upon the following rules:

- The Start and End dates of the baseline record must be within the effective Start and End dates of the source product.
- The account of the baseline record must be the same account as that of the source product.
- The product of the baseline record must be the same as that of the source product.

These records are associated with an accrual fund in much the same way that SVP baseline records are associated with promotions.

After the SVP baseline records are associated with the accrual fund, adjustments are made for partial weeks. Then the SVP baseline records are rolled up to the source product, where the Accrual Rate or Accrual % is applied to calculate the Forecast for source products. Then, the forecast for each source product is rolled up to the account accrual fund.

This task is a step in ["Process of Managing Trade Funds" on page 146](#).

### ***To create a forecast for an accrual fund***

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Drill down on the Name field hyperlink for a selected account, and click the Funds view tab.
- 3 In the Funds list, select an accrual fund record, and click Forecast.

The appropriate Baseline records are associated with the Fund, and the Forecast field for the fund is populated.

When you have created the forecast for the accrual fund, you can examine the forecasted revenue for both the fund and for each Source Product associated with the fund.

### ***To review the forecasted revenue for accrual funds and their source products***

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Drill down on the Name field hyperlink for a selected account, and click the Funds view tab.
- 3 In the Funds list, select an accrual fund record for which you have created a forecast.
- 4 Examine the Forecast field for this record.

This value is the forecasted value of the Fund and is calculated from the rollup of the Forecast field from all Source Products.

- 5 Scroll down, and click the Source Products view tab.
- 6 For each source product examine the following fields:
  - **Est Total Volume.** This value is the rolled-up value of the Estimated Total Volume of all the SVP baseline records associated with this source product. This value is also adjusted for partial periods.
  - **Forecast.** The value of this field is calculated by multiplying the Est Total Volume by the Accrual Rate of the of the source product if the basis is cases OR by multiplying the Est Total Volume by the Accrual % if the basis is revenue.

## Transferring Fund Amounts (End User)

Key account managers can transfer amounts between funds. Typically, transferring funds requires approval from a regional sales manager or a marketing administrator. For information about approving fund transfers, see [“Approving a Fund Transfer \(End User\)” on page 156](#).

This task is a step in [“Process of Managing Trade Funds” on page 146](#).

### *To transfer a fund amount*

- 1 Navigate to the Accounts screen > Accounts List view.
  - 2 Drill down on the Name field hyperlink for a selected account, and click the Funds view tab.
  - 3 In the Funds list, select a fund record.
  - 4 Click the appropriate subview tab, and create a new record:
    - If you want to transfer an amount into this fund, click the Transfers In subview tab.
    - If you want to transfer an amount out of this fund, click the Transfers Out subview tab.
- NOTE:** You can transfer money between funds of different currencies.
- 5 Complete the necessary fields.
  - 6 In the Submitted To field, select the employee responsible for approving the transfer.  
The transfer appears in the Transfer Approvals subview of the employee selected.
  - 7 Change the Status field to Submitted.

## Approving a Fund Transfer (End User)

Regional sales managers and marketing administrators can view and approve fund transfers.

This task is a step in [“Process of Managing Trade Funds” on page 146](#).

### *To approve a fund transfer*

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Drill down on the Name field hyperlink for a selected account, and click the Funds view tab.
- 3 In the Funds list, select a fund record.
- 4 Click the Transfer Approvals subview tab.
- 5 Click the Status field drop-down list, and select Approved.

## Submitting Payments Against Funds (End User)

Before running promotions, key account managers can create deals against a promotion or promoted product. After they have run the promotion, the key account managers submit payments against the deals, and also against accounts, promotions, and promoted products.

This task is a step in [“Process of Managing Trade Funds” on page 146](#).

### *To submit payments*

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Drill down on the Name field hyperlink for a selected account, and click the Checkbook view tab.
- 3 In the Checkbook list, perform either of the following actions, as appropriate to your needs:
  - Query for a check.
  - Create a new check.
- 4 In the Payments list, select a deal.
- 5 Click the Deal Id field select button.
- 6 In the Pick Allocation dialog box, enter the amount of the payment you want to request, and click OK.

**NOTE:** After they are submitted, payments are sent to the back office for processing. When processing is completed, the status of the payment changes to Paid. Payments with a status of Paid are identified by the application and processed. For more information about this processing and the results, see [“About Configuring Information for Consumer Goods Funds” on page 160](#).

Table 18 summarizes the payment at different status stages and the results seen by the end user.

Table 18. End User Views for Payment Status Stages

	Pending Status	Submitted Status	Paid Status
Payment	For the deal that is associated with the record, the Payments Pending field is updated with the amount of the record.	<ul style="list-style-type: none"> <li>■ The end user manually changes the status of the record to Submitted.</li> <li>■ For the deal that is associated with the record, the Payments Pending field is decreased, and the Payments Submitted field is increased by the amount of the record.</li> </ul>	<ul style="list-style-type: none"> <li>■ The back office updates the status of the record to Paid. (You can also do this by manually changing the status of the record to Paid.)</li> </ul> <p>For the deal that is associated with the record, the Payments Submitted field is decreased, and the Payments Paid field is increased by the amount of the record.</p> <ul style="list-style-type: none"> <li>■ For the fund that is associated with the deal, the Payments field is updated.</li> <li>■ In the plan, promotion, and promoted products containing the deal, the Actual Funds field is updated with the amount of the record.</li> </ul>

## Reviewing Funds, Deals, and Payments (End User)

Key account managers can review funds, deals, and payments to track estimated, committed, and actual spending.

This task is a step in [“Process of Managing Trade Funds”](#) on page 146.

**To review funds**

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Drill down on the Name field hyperlink for a selected account, and click the Funds view tab. The Funds list displays all funds associated with the selected account record.
- 3 Click the More Info subview tab to review the fields.

Some fields are described in the following table.

Field	Comments
Account	The account that is associated with the fund.
Adjustments	Adjustments to the fund amount. Includes decreases or increases to the fund amount. Excludes transfers, accruals, and payments.
Amount	The beginning amount of the fund.
Basis	The value used to accrue funds (for example, Cases or Revenue).
Committed	An amount set aside in deals with a status of Committed or Closed.
End	The ending date of the fund.
Estimated	Amount set aside in deals with status other than Committed or Closed.
Fund	Name of the fund.
Fund Id	System-supplied identification number of the fund.
Period	The period of time for which the fund is valid.
Start	The starting date of the fund.
Sub-total	Calculated amount derived using the following equation: Amount plus Adjustments plus Transfers.
Transfers	Sum of the approved transfers into or out of the fund.
Type	Fund type, either Accrual or Fixed, selected from a drop-down list. Accrual funds are funds in which the amount is calculated from the products and accruals associated with the fund. Fixed funds are fixed amounts of money allocated in a lump sum.
Unallocated	Calculated amount derived by subtracting allocations to child funds from the fund subtotal.
Uncommitted	An amount, from a fixed fund, that has not been allocated to a child fund. This amount is calculated by subtracting the committed amount from the fund subtotal.

**To request payments by the account checkbook**

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Drill down on the Name field hyperlink for a selected account, and click the Checkbook view tab.

- 3 In the Checkbook list, perform either of the following actions, as appropriate to your needs:
  - Query for a check record.
  - Create a new check record.
- 4 In the Payments list, select an existing deal record, or create a new payment record.
- 5 In the Amount field, enter the amount of the payment you want to request, and save the record.  
For a summary of the different payment stages and the results seen by the end user see [Table 18 on page 158](#).

**NOTE:** After they are submitted, payments are sent to the back office for processing. When processing is completed, the status of the payment changes to Paid. Payments with a status of Paid are identified by the application and processed. For more information about this processing and the results, see [“About Configuring Information for Consumer Goods Funds” on page 160](#).

## About Configuring Information for Consumer Goods Funds

This topic provides details about the steps to follow when configuring the Siebel Funds module. Topics include:

- 1 [“Rolling Up Paid Payments” on page 160](#)
- 2 [“Using Consumer Goods Payment” on page 161](#)
- 3 [“Using Consumer Goods Payment Business Service” on page 162](#)
- 4 [“Setting User Properties for Funds” on page 164](#)
- 5 [“Configuring Enterprise Integration Manager for Funds” on page 165](#)
- 6 [“Specialized Methods Invoked in Trade Funds” on page 165](#)

### Rolling Up Paid Payments

After the end user submits payments, the payments are sent to the back office for processing. After the payments are processed, the status of the payment is changed to Paid. When a payment status is changed to Paid in a back-office system, that change in status triggers a series of events resulting in the aggregation, or rolling up, of payment data in Siebel Consumer Goods:

- 1 CG Payment workflow policy (part of the CG Payment workflow group) is invoked.
- 2 Workflow Monitor Agent task is started for the CG Payment workflow group, which monitors the CG Payment policy.
- 3 When the Payment status is updated to Paid, the workflow process is executed.
- 4 The workflow policy invokes the CG Payment Process workflow.
- 5 The workflow process invokes the CG Payment Business Service.



- 6 The business service rolls up (aggregates) Paid payments within the plan, promotion, and promoted product (as long as the payment is associated with the promoted product):
  - If a paid payment is associated with the promotion, it is rolled up with the promotion and the plan that contains the promotion (if a plan is used).
  - If a paid payment is associated with a promoted product, it is rolled up with the promoted product, promotion that contains the promoted product, and plan that contains the promotion (if a plan is used).

When the CG Payment Business Service has completed the rollup, you can verify if the workflow succeeded by looking at the Actual Fund Payments field of the plan, promotion, and promoted product. The Actual Fund Payments field is the sum of all the payments at that level or lower.

## Using Consumer Goods Payment

To use the CG Payment Process, you need to export the workflow process from the sample database of the Consumer Goods product and import it into the server database. To do this you must carry out the following procedures.

### *To export the workflow process*

- 1 From Siebel Consumer Goods, connect to the sample database.
- 2 Navigate to the Administration - Business Process screen > Workflow Processes list view.
- 3 In the Workflow Processes list, query for Name = CG Payment Process.
- 4 Click Menu and choose Export Workflow.
- 5 Export the CG Payment Process into XML format to a location from which it can be retrieved.

### *To import the workflow process*

- 1 From Siebel Consumer Goods, connect to the server database.
- 2 Navigate to the Administration - Business Process screen > Workflow Processes list view.
- 3 Click Menu, and choose Import.
- 4 Import the CG Payment Process workflow that was exported to XML format into the server database.

### *To test the Workflow Process in the workflow process simulator*

Before you run the Process Simulator for the first time, you must set your debug options. For more information, see the *Siebel Business Process Framework: Workflow Guide*.

### *To execute the workflow process invoked by Workflow Policy*

- 1 Navigate to the Administration - Business Process screen > Workflow Policy Actions view.

- 2 In the Actions list, click New to define a new action.
- 3 In the Program field, use the drop-down list to select the Run Workflow Process program.
- 4 In the Arguments list, in the Argument field, select ProcessName.
- 5 In the Value field, enter the name of the workflow process you want to invoke as the argument value, (for example CG Payment Process.)
- 6 Navigate to the Administration - Business Process screen > Workflow Policy Groups view.
- 7 In the Policy Groups list, click New to define a new group, and name it.
- 8 Navigate to the Administration - Business Process screen > Workflow Policies view.
- 9 In the Policies List, click New to define a new policy.
  - a In the Conditions list, click New to define a condition for the policy that must be met to invoke the workflow process.
  - b In the Actions list, click New to define a new action, and enter the name of the action you defined in Step 1.
- 10 Run Generate Triggers.

For more information about generate triggers, see the *Siebel Business Process Framework: Workflow Guide*.
- 11 If you are using the Run Workflow Process program, verify that the Workflow Process Manager server component is online.
- 12 Run Workflow Monitor Agent.

For more information about Workflow Monitor Agent, see the *Siebel Business Process Framework: Workflow Guide*.

### **To access the CG Payment Process workflow process**

- 1 Navigate to the Administration - Business Process screen > Workflow Processes view.
- 2 In the Workflow Processes list, click Menu and select New Query.
- 3 In the Name field, type CG Payment Process.
- 4 Click Menu and select Run Query.
- 5 In the Name field, drill down on the CG Payment Process hyperlink.

The Workflow Process Designer view appears. Use the graphical flowchart tool in this view to modify the business service. For more information about workflows, see the *Siebel Business Process Framework: Workflow Guide*.

## **Using Consumer Goods Payment Business Service**

The CG Payment Business Service uses the following business object and business components:

### **Business Object:**

CPG Plan

**Business Components:**

- CG MDF Promotion Allocation
- CPG Plan Account
- CPG Plan Account Promotion
- CPG Plan Account Promotion Product
- CPG MDF Allocation
- CG Promo Product Fund Payment
- CPG Check Payment Via MDF

The business service primarily performs three steps:

- 1 Copies the Amount into the Paid bucket.
- 2 Rolls up the amount in the Paid bucket to the Allocations Paid Payments field.
- 3 Rolls up Paid Payments in the Allocation to the Actual Fund Payments in the Parent Promotion.

Specifically, the business service follows this sequence:

- 1 Gets the ROW\_ID of the Payment record with a status of Paid.
- 2 Gets the Parent Allocation Id of the Payment record.
- 3 Gets the CPG Plan Business Object and CG MDF Promotion Allocation Business Component.
- 4 Runs through the records in the CG MDF Promotion Allocation, and positions to the record with the ROW\_ID = Parent Allocation Id.
- 5 Finds the values of Fund Promotion Id, Promo Plan Id, and Plan Account Promo Prod Id fields from the positioned record.
- 6 Instantiates the following Business Components:
  - CPG Plan Account Promotion
  - CPG Plan Account Promotion Product
  - CPG MDF Allocation
  - CG MDF Promotion Allocation
  - CG Promo Product Fund Payment
  - CPG Check Payment Via MDF
- 7 Determines if Promo Plan Id is Null:
  - If the Promo Plan Id is Null (Promo has a plan), instantiates Business Component CPG Plan Account.
  - If the Promo Plan Id is Not Null, then instantiates CPG Plan Account Promotion and CPG Plan Account Business Components.
- 8 Determines if Account Promo Prod Id is Null:

- If Yes (indicating that it is an allocation under promotion and not a promotion product), it positions CPG Check Payment Via MDF and CG MDF Promotion Allocation Business Components. It sets the following values in the CG MDF Promotion Allocation and forces the roll up:
  - Paid Amount = Trade Fund Amount
  - Submitted Amount = 0
  - Pending Amount = 0
- If No, it positions CG Promo Product Fund Payment, CPG MDF Allocation, and CPG Plan Account Promotion Product Business Components. It sets the following values in the CG MDF Allocation and forces the rollup:
  - Paid Amount = Trade Fund Amount
  - Submitted Amount = 0
  - Pending Amount = 0

**CAUTION:** If you use Siebel Enterprise Integration Manager to update the Status of the Payment record, make sure you use a Business Component based on class CSSBusComp in the Integration Object. For example, if you are trying to use CPG Check Payment through MDF for updating the payment status, make a copy of the Business Component, change the class to CSSBusComp, and use the modified one in the Integration Object. This modification is required to avoid the conflict between specialized class behavior and the business service.

## Setting User Properties for Funds

Table 19 lists the user properties configurators must set to control propagation of source products from fund groups to account funds.

Table 19. User Properties For Funds

Parent Object Type	Business Component
Description	<p>There are two user properties that can be set on the business component CS Fund Group as follows:</p> <ul style="list-style-type: none"> <li>■ Populate Products value can be Y or N. Default value is N. When the value is set to Y, the source and target products at the fund group level are populated when the Generate button is pressed to generate account funds.</li> <li>■ Total Records value is a number, for example, 10. Default value is to use the business service. If the total number of source and target records at the fund group level exceeds this number, the business service process are used to generate the account funds. Otherwise, the client process is used to generate the account funds.</li> </ul>
Functional Area	CS Fund Group

## Configuring Enterprise Integration Manager for Funds

The COST\_TYPE\_CD column on the S\_MDF\_ALLOC table has a List of Values (LOV) bounded property and is part of the S\_MDF\_ALLOC\_U2 key. It is used to uniquely identify the ALLOC records. Currently it is not possible to remove the LOV bounded flag on the S\_MDF\_ALLOC, COST\_TYPE\_CD column. This property definition causes EIM to search for a bounded LOV value. Because it can not find the unique values for this column on the List of Values table, EIM cannot update the allocation record error.

## Specialized Methods Invoked in Trade Funds

The procedures documented in the Trade Funds chapter include buttons that invoke specialized methods, as described in [Table 20](#).

Table 20. Buttons And Methods For Funds Configurators

Button	Method	Description	Supported On
Apply	ShowPopup	Pops up group of eligible accounts.	Bus Comp Layer
	OK	Adds fund participants to fund group.	
Generate	FundGenerate	Adds account funds to fund group.	Bus Comp Layer
Products	OnCatalogProducts	Adds all products that belong to the source category or target category of fund or fund group.	Bus Comp Layer
Refresh	OnRefreshMvg	Refreshes the form.	Bus Comp Layer
Release Commitments	ReleaseCommitment	Makes the amount of the deal equal to the sum of the deal payments.	Bus Comp Layer



# 10 Deductions

This chapter describes the main steps involved in managing deductions. Following the procedures given in this chapter, you can create, split, assign, research, and resolve deductions. Topics include:

- [“About Deductions” on page 167](#)
- [“Scenarios for Managing and Resolving Deductions” on page 168](#)
- [“Process of Managing Promotions Deductions” on page 170](#)
- [“Creating and Editing Deductions” on page 171](#)
- [“Adding Literature to Deductions” on page 172](#)
- [“Splitting Deductions” on page 173](#)
- [“Creating Credit Memos” on page 173](#)
- [“Analyzing Workloads” on page 174](#)
- [“Creating Activity Templates” on page 175](#)
- [“Reviewing Deductions \(End User\)” on page 175](#)
- [“Viewing Account Deductions \(End User\)” on page 176](#)
- [“Creating Deduction Activities \(End User\)” on page 176](#)
- [“Creating Deduction Activity Plans \(End User\)” on page 177](#)
- [“Associating and Modifying Invoices \(End User\)” on page 177](#)
- [“Creating Deduction Attachments \(End User\)” on page 178](#)
- [“Creating Deduction Notes \(End User\)” on page 178](#)
- [“Reviewing Account Credit Memos \(End User\)” on page 178](#)
- [“Reviewing Deduction Literature \(End User\)” on page 179](#)
- [“Resolving Deductions \(End User\)” on page 179](#)

## About Deductions

*Deductions* occur when customers submit partial payment of an invoice. The unpaid balance is known as a deduction. The consumer goods organization needs to research the reason behind the deduction, and resolve the deduction appropriately. Topics include:

- [“About Types of Deductions” on page 168](#)
- [“About Generating a Deduction” on page 168](#)
- [“About Resolving Deductions” on page 168](#)

## About Types of Deductions

There are two types of deductions each of which have different purposes as follows:

- **Trade Promotions deductions.** The customer claims a deduction because of a trade promotion that is being conducted.
- **HQ deductions.** This type covers all other deductions, including late deliveries, goods arriving damaged or expired, and invoicing errors.

## About Generating a Deduction

The process of generating a deduction begins when your company's accounting department receives a partial payment on a customer invoice. The deduction information can be passed through to the Siebel Consumer Goods application in several ways, depending on your company's implementation of the product.

Methods can include the following:

- Integrating back-office software with Siebel Consumer Goods application.
- Accounting department personnel manually creating a deduction record.

## About Resolving Deductions

The key account manager or customer financial service representative is responsible for resolving deductions. Options for resolving deductions include:

- Rejecting the deduction and recharging the customer (chargeback).
- Approving the deduction and applying its cost to one or more trade fund allocations.
- Writing off the deduction.
- Applying a credit memo.

# Scenarios for Managing and Resolving Deductions

These scenarios are examples of processes performed by customer financial service representatives, customer financial service managers and key account managers. Your company might follow a different process according to its business requirements. The scenarios for deductions are:

- ["Scenario for Managing Promotions Deductions" on page 169](#)
- ["Scenario for Managing HQ Deductions" on page 169](#)
- ["Process of Managing Promotions Deductions" on page 170](#)



## Scenario for Managing Promotions Deductions

The key account manager for a food and beverage manufacturer is setting up a promotion to feature your company's line of gourmet coffee products at a chain of grocery stores. The promotion includes a provision to reimburse the grocery chain for the cost of purchasing newspaper advertisements and creating signs to publicize a sale on your coffee line. Rather than authorize a payment to cover the advertising and sign expenses, the key account manager arranges for the grocery chain to deduct those costs from the next invoice it receives from your company.

Next, the key account manager opens the Siebel Consumer Goods application to preauthorize the deduction. He selects the plan he created for fall promotions at the grocery chain and adds a new record for the gourmet coffee promotion. After entering relevant information about the promotion, he enters the names of the four gourmet coffee products and allocates funds for each individual product. He allocates \$2,500 as the cost of promoting one product (one-fourth of the total promotion cost). Within the fund allocation record of each coffee product, he preauthorizes the deduction.

One month later, the grocery chain returns its payment for a \$45,000 invoice from your company. It sends your company a check for \$35,000, along with a debit memo referencing the deduction. The accounts receivable department notes the \$10,000 discrepancy, a deduction record is created and passed to Siebel Consumer Goods.

The next day the key account manager brings up the list of deductions for the accounts he manages, and sees the new deduction record. Because he preauthorized the deduction when he allocated promotion funds, the allocated funds are available to resolve the deduction.

The key account manager then researches the deduction, including verifying the terms of the promotion, and resolves the deduction by applying the fund allocation to cover the \$10,000.

## Scenario for Managing HQ Deductions

A customer of a food and beverage manufacturer submits a payment of \$25,000 against an invoice for \$45,000. As a result, the back-office system generates a deduction for \$20,000. (Alternatively, the deduction is generated directly in Siebel Consumer Goods and shared with the back office.)

A customer financial service representative, reviews the attached scanned debit memo and other supporting documentation. She determines that \$15,000 of the total resulted from a promotion run last month and that the remaining \$5,000 resulted from the return of unsaleable goods. Because the original deduction resulted from different types of activities, the customer financial service representative splits the original deduction. Two deductions are created—one for \$15,000, reflecting the portion related to promotions and another for \$5,000, reflecting the portion related to unsaleable goods. Based on the type of deduction and account, Siebel Consumer Goods automatically routes the deduction to the appropriate team for resolution. The \$15,000 deduction resulting from a promotion is routed to the account team. As head of the account team, the key account manager resolves the deduction resulting from the promotion. To see how the key account manager resolves this deduction, see ["Scenario for Managing Promotions Deductions" on page 169](#).

The customer financial service representative also resolves the other newly created deduction because she handles HQ deductions from this customer. After more closely researching the deduction and locating the credit memo authorizing the return of unsaleable goods, she determines that the correct deduction amount should have been \$4,950. Because the difference of \$50 is immaterial and within the company's write-off threshold, the customer financial service manager resolves \$4,950 against the credit memo and writes off \$50.

## Process of Managing Promotions Deductions

This topic lists the tasks typically performed by administrators and end users when managing deductions. Your company might follow a different process according to its business requirements.

### Administrator Procedures

The following list shows tasks administrators typically perform to manage promotions deductions:

- 1 ["Creating and Editing Deductions" on page 171](#)
- 2 ["Adding Literature to Deductions" on page 172](#)
- 3 ["Splitting Deductions" on page 173](#)
- 4 ["Creating Credit Memos" on page 173](#)
- 5 ["Analyzing Workloads" on page 174](#)
- 6 ["Creating Activity Templates" on page 175](#)

### End-User Procedures

The following list shows tasks end users typically perform to access and use deductions:

- 1 ["Reviewing Deductions \(End User\)" on page 175](#)
- 2 ["Viewing Account Deductions \(End User\)" on page 176](#)
- 3 ["Creating Deduction Activities \(End User\)" on page 176](#)
- 4 ["Creating Deduction Activity Plans \(End User\)" on page 177](#)
- 5 ["Associating and Modifying Invoices \(End User\)" on page 177](#)
- 6 ["Creating Deduction Attachments \(End User\)" on page 178](#)
- 7 ["Creating Deduction Notes \(End User\)" on page 178](#)
- 8 ["Reviewing Account Credit Memos \(End User\)" on page 178](#)
- 9 ["Reviewing Deduction Literature \(End User\)" on page 179](#)
- 10 ["Resolving Deductions \(End User\)" on page 179](#)

# Creating and Editing Deductions

The procedure for resolving deductions begins by creating a detailed deduction record.

This task is a step in [“Process of Managing Promotions Deductions”](#) on page 170.

## *To add or edit deduction records*

- 1 Navigate to the Administration - Data screen > Deductions view.
- 2 Create a new record, or query to find the record you need to edit, and then select it.
- 3 Fill in or edit the fields as required.

Some fields are described in the following table.

Field	Comments
Account	The account that submitted the deduction.
Account Team	This field is automatically populated with the members of the account team when a deduction is created for that account, if a team has previously been created for that account. Deductions are visible to all account team members, and can be resolved by all account team members.
Amount	The amount the customer deducted from the invoice total.
Assigned To	The individual employee to which the deduction is assigned. However, the deduction is visible to all account team members.
Charge Back	The amount of the deduction you reject. The amount you enter in this field can be less than, or equal to, the Deduction Amount, but it cannot exceed the Deduction Amount.
Credit Memo	Sum of amounts resolved against credit memos.
Date Received	The date the deduction was received by your company.
Debit memo	Debit memos are documents from the customer explaining why they are not sending the total invoice payment.
Id	A unique number or code that identifies a deduction.
New	A mark in this column indicates that this is a new deduction record, and is visible to the entire account team.
Parent ID	The Deduction Id of the original deduction. This field is populated in child deduction records created as the result of a deduction split.
Priority	The level of urgency with which the deduction is resolved. The values are Very High, High, Medium, and Low.
Reason	The reason given for the deduction. The list of reasons is dynamically determined by the Type value.
Site	The location of the account from which the deduction was submitted.

Field	Comments
Status	<p>Indicates the current status of a deduction. The values are:</p> <ul style="list-style-type: none"> <li>■ <b>Open.</b> No part of the deduction has been resolved.</li> <li>■ <b>In Progress.</b> A portion of the deduction has been resolved.</li> <li>■ <b>Resolved.</b> When the total amount resolved is equal to the deduction amount.</li> <li>■ <b>Closed.</b> The Deduction has been successfully processed.</li> <li>■ <b>Inactive.</b> The original deduction record has been split into two deduction records and is no longer active.</li> </ul>
Status Date	The date the status last changed.
Remaining	The amount of the deduction that still needs to be resolved.
Total Resolved	Sum of trade funds, credit memos, write-offs, and chargebacks.
Type	Type of deductions.

## Adding Literature to Deductions

Only administrators can add literature to deduction records. Examples of literature include:

- Bills of lading
- Debit memos
- Fact sheets about promotions
- Pick tickets
- Remittances
- Customer correspondence

This task is a step in [“Process of Managing Promotions Deductions”](#) on page 170.

### *To add literature to a deduction*

- 1 Navigate to the Administration - Data screen > Deductions view.
- 2 Select the appropriate deduction record.
- 3 Click the Literature view tab, and click New.
- 4 In the Add Literature dialog box query for and select the required Literature item, and click OK.  
The Literature Item is added to the deduction.

## Splitting Deductions

Customers occasionally combine different types of deductions. For example, a buyer who runs a trade promotion and also receives broken merchandise in a shipment might combine the costs of the promotion and the broken merchandise into one deduction. To properly account for the two different deduction types, you need to split the original deduction into two separate deductions.

When you split a deduction record into two separate deduction records, the original deduction record is retained, but its status is changed to inactive. The system-generated ID of the original deduction appears in the split record's Parent ID field.

**NOTE:** You can split deductions only when the status is Open.

This task is a step in [“Process of Managing Promotions Deductions”](#) on page 170.

### *To split deductions*

- 1 Navigate to the Administration - Data screen > Deductions view.
- 2 Select a deductions record.
- 3 Click the Split view tab.
- 4 In the Deductions list, and click Split.  
Two new records appear in the Split list.
- 5 In the Split list, select one of the new deduction records, and fill in the fields in the Split Deductions form as required.  
Be sure to adjust the Amount fields to reflect the value of the split deductions.  
Repeat [Step 5](#) for the second new deduction record.

## Creating Credit Memos

Administrators can add or modify credit memos.

This task is a step in [“Process of Managing Promotions Deductions”](#) on page 170.

### *To add or modify credit memos from the Credit Memo Administration view*

- 1 Navigate to the Administration - Data screen > Credit Memos view.  
The Account Credit Memo Administration view appears.
- 2 In the Account form, query for the appropriate account record.  
Credit memos associated with the selected account appear in the Credit Memos list.

- 3 In the Credit Memos list, select a record to edit, or create a new record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Credit ID	A system-generated number identifying the credit memo.
Type	Type of credit memo. Can include: <ul style="list-style-type: none"> <li>■ <b>Invoicing.</b> Errors made on the invoice.</li> <li>■ <b>Unsaleable.</b> Goods arrived expired or spoiled.</li> <li>■ <b>Returns.</b> Goods returned for any reason other than unsaleable.</li> <li>■ <b>Transportation.</b> Late delivery.</li> <li>■ <b>Unknown.</b> Invoices which do not fall into the invoicing, Unsaleable, Returns, or Transportation categories.</li> </ul>
Invoice ID	A unique number used to reference the invoice record. The drop-down list in this field can be used to associate preexisting invoices to the credit memo.
Amount	The amount of the credit memo.

## Analyzing Workloads

Customer financial service managers or administrators can analyze the deduction resolution workloads among employees.

This task is a step in ["Process of Managing Promotions Deductions"](#) on page 170.

### *To analyze deductions workloads*

- 1 Navigate to the Deductions screen > Deductions List view.
- 2 In the visibility filter, select the appropriate filter:
  - **My Deductions.** Displays all deductions for accounts to which the user is an assigned team member (primary or not).
  - **My Team's Deductions.** This view is visible only to users with direct reports, for example, a customer financial services manager. If the manager's direct reports (or their subordinates) have deductions assigned to them, these deductions are displayed here.
  - **All Deductions.** Displays all deductions within the user's organization.
  - **All Deductions Across Organizations.** Displays all deductions across all organizations within the Siebel database.
- 3 In the Deductions list, query for the appropriate records and select all the deductions you want to analyze.
- 4 In the Deductions link bar, click the Charts link.

- 5 From the drop-down list, choose the type of chart you want to view.

In the standard Siebel Consumer Goods application, the chart selections are Aging Analysis, Status and Priority Analysis, Account and Type Analysis, and Rep Workload Analysis.

## Creating Activity Templates

*Activity templates* are created by an administrator and are blueprints for sets of activities. Activity templates can be invoked by end users to create activity plans.

This task is a step in [“Process of Managing Promotions Deductions” on page 170](#).

### To create Activity plan templates

- 1 Navigate to the Administration - Data screen > Activity Templates view.
- 2 In the Activity Templates list create a new record.
- 3 From the Type field drop down list, choose the appropriate value.
- 4 Click the Activity Template Details view tab, and create new records as necessary.

For more information about creating activity templates, see the *Siebel Applications Administration Guide*.

## Reviewing Deductions (End User)

End users can review, query, sort and reassign all deductions assigned to them or to the account team.

This task is a step in [“Process of Managing Promotions Deductions” on page 170](#).

### To review deductions

- 1 Navigate to the Deductions screen > Deduction List view.
- 2 From the visibility filter, select one of the filters:
  - **My Deductions.** Displays all deductions for accounts to which the user is an assigned team member (primary or not).
  - **My Team’s Deductions.** This view is visible only to users with direct reports, for example, a customer financial services manager. If the manager’s direct reports (or their subordinates) have deductions assigned to them, these deductions are displayed here.
  - **All Deductions.** Displays all deductions within the user’s organization.
  - **All Deductions Across Organizations.** Displays all deductions across all organizations within the Siebel database.

- 3 Select a deduction record, and choose any of the available view tabs to review or add details to the deduction.

**NOTE:** Only users with administrator privileges can attach literature to a deduction using the literature view tab.

## Viewing Account Deductions (End User)

Key account managers can review information about all deductions taken by an account. By selecting different accounts, key account managers can view and compare the deductions taken by different accounts.

This task is a step in [“Process of Managing Promotions Deductions” on page 170.](#)

### *To view deductions for an account*

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Drill down on the Name field hyperlink for a selected account, and click the Deductions view tab.  
The Deductions list displays all the deductions associated with that account.

## Creating Deduction Activities (End User)

Key account managers and customer financial services representatives and managers can view and create activities related to deductions. For example, a customer financial services representative receives a deduction for an invoice pricing error. The customer financial services representative creates an activity for the orders department to verify the invoicing error. An employee in the orders department completes the activity. When the activity has been completed, the customer financial services representative can resolve the deduction.

This task is a step in [“Process of Managing Promotions Deductions” on page 170.](#)

### *To create deduction activities*

- 1 Navigate to the Deductions screen > Deduction List view.
- 2 Drill down on the ID field hyperlink for a selected deduction, and click the Activities view tab.
- 3 In the Activities list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Created	The date and time on which the activity was created.
Type	The classification of the activity.
Description	A description of the activity.



Field	Comments
Due	The date on which the activity is due to be completed.
Assigned To	The person responsible for completing the activity.
Priority	The priority of the activity.
Status	The status of the activity.

## Creating Deduction Activity Plans (End User)

An activity plan is a group of predetermined activities that embody the policies, procedures, and best practices for managing deductions. Customer financial services managers, key account managers, and customer financial services representatives can create activity plans by selecting from predefined templates.

This task is a step in [“Process of Managing Promotions Deductions” on page 170](#).

### *To create deduction activity plans*

- 1 Navigate to the Deductions screen.
- 2 Drill down on the ID field hyperlink for a selected deduction, and click the Activity Plans view tab.
- 3 In the Activity Plans list, create a new record, and complete the necessary fields.

In the Template field, select a template that includes all the predefined activities recommended for resolving this type of deduction.

## Associating and Modifying Invoices (End User)

Invoices can be imported from your company's back-office system, or manually created by an administrator. End users can associate existing invoices to a deduction and edit existing invoice information.

This task is a step in [“Process of Managing Promotions Deductions” on page 170](#).

### *To associate or modify invoices*

- 1 Navigate to the Deductions screen > Deduction List view.
- 2 Select a deduction record.
- 3 Drill down on the ID field hyperlink for a selected deduction, and click the Invoices view tab.
- 4 Create a new record.

- 5 Complete the necessary fields.

**NOTE:** Marketing administrators and other managers or administrators can view all invoice records and create invoices by navigating to the Invoices screen if invoice fields are not automatically populated. For more information about creating invoices, see the *Siebel Field Service Guide*.

## Creating Deduction Attachments (End User)

Employees in the customer financial services department and key account managers can view and attach documents to deductions.

This task is a step in [“Process of Managing Promotions Deductions”](#) on page 170.

### *To create deduction attachments*

- 1 Navigate to the Deductions screen > Deduction List view.
- 2 Drill down on the ID field hyperlink for a selected deduction, and click the Attachments view tab.
- 3 Create a new record, and complete the necessary fields.

## Creating Deduction Notes (End User)

Customer financial services representatives, key account managers, and customer financial services managers can read and add notes to deduction records.

**NOTE:** *Shared* notes are visible to all users who can view the deduction. *Private* notes are visible only to the creator of the note.

This task is a step in [“Process of Managing Promotions Deductions”](#) on page 170.

### *To create deduction notes*

- 1 Navigate to the Deductions screen > Deduction List view.
- 2 Drill down on the ID field hyperlink for a selected deduction, and click the Notes view tab.
- 3 Create a new record.
- 4 From the Show drop-down filter, select Shared Notes or Private Notes.

## Reviewing Account Credit Memos (End User)

Customer financial services representatives can review all credit memos issued to a an account and payments issued against credit memos.

This task is a step in [“Process of Managing Promotions Deductions”](#) on page 170.

### *To review account credit memos*

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Select the account record for which you want to review credit memos.
- 3 Drill down on the Name field hyperlink, and click the Credit Memos view tab.
- 4 In the Credit Memos list, select the credit memo record for which you want to view payments.
- 5 Scroll down, and click the Credit Memo view tab.

Details about the credit memo appear in the form. Payments made against the selected credit memo appear in the Payments list.

## Reviewing Deduction Literature (End User)

Key account managers and customer financial services representatives and managers can view literature attached to deductions.

This task is a step in [“Process of Managing Promotions Deductions”](#) on page 170.

### *To review deduction literature*

- 1 Navigate to the Deductions screen > Deduction List view.
- 2 Drill down on the ID field hyperlink for a selected deduction, and click the Literature view tab.  
Literature attached to the selected deduction appears in the Literature list.
- 3 Click the Name field hyperlink in the Literature list to open a literature attachment.

## Resolving Deductions (End User)

When key account managers and customer financial services representatives finish researching a deduction, they choose from different methods for resolving deductions. The methods available for resolving deductions, (for example Invoicing, Unsaleable) depend on the deduction type, either Promotion or HQ.

The steps the user takes to resolve the deduction are reflected in the Totals row at the bottom of the Deduction Resolution list view, and in summary fields of the Deductions form. With each fund payment, credit memo, chargeback, or write-off submitted, the figures displayed in the respective summary fields and the Total Resolved field are updated, and the figure in the Remaining field is reduced. To completely resolve the deduction, the amount in the Total Remaining field must be reduced to \$0.00.

This task is a step in [“Process of Managing Promotions Deductions”](#) on page 170.

## Resolving Promotion Deductions

For deductions of the type Promotion, any combination of the following methods can be used:

- Applying trade funds
- Writing off all or part of a deduction
- Issuing chargebacks

### *To resolve Promotion deductions*

- 1 Navigate to the Deductions screen > Deduction List view.
- 2 Drill down on the ID field hyperlink for a selected deduction, and click the Resolution view tab.
- 3 Apply trade funds, if appropriate.
  - a In the Resolutions link bar, click the Payments link, and create a new record.
  - b Click the select button in the Deal ID field, select a deal from the Deal drop-down list, click OK, and enter the payment amount you are approving in the Amount field.

A new payment record is generated.

**NOTE:** To determine the activity against deals, refer to the Amount, Payments Paid, Payments Submitted, and Payments Pending fields in the Pick Allocation dialog box.
  - c Repeat [Step a](#) through [Step b](#) for each payment you want to create for the deduction.
  - d Submit payments:
    - Click Menu, choose Submit to submit an individual payment record.
    - Click Menu, choose Submit All to submit all payments records in the Payments list.
- 4 Write off all or part of a deduction, if appropriate.
  - a In the Resolutions link bar, click the Write Off link, and create a new record.
  - b Click Menu, and choose Submit or Submit All.
- 5 To reject part or all of the deduction, issue a chargeback.
  - a In the Resolutions link bar, click the Chargeback link, and create a new record.
  - b Click Menu, and choose Submit or Submit All.

The information you entered can be exported to your company's back-office information system. A member of the accounts receivable department can use this information to write a letter to the customer requesting payment of the chargeback amount.

## Ability to Void and Cancel Payments

This feature provides the Key account managers (KAMs) and customer financial service representatives the ability to void and cancel payments.

- If the KAM creates a payment, they have the ability to void the payment before submitting the payment to the back office.

- If the KAM creates a payment and submits the record, they still have the ability to void the payment providing it has not been processed by the back office.
- If the KAM creates a payment and submits the record which is processed by the back office, they can cancel the payment and proceed to create a new payment record.

### *To void or cancel payments*

- 1 Navigate to the Deductions screen > Deduction List view.
- 2 Drill down on the ID field hyperlink for a selected deduction, and click the Resolution view tab.
- 3 In the Resolutions link bar, click the Payments link.
- 4 In the Status field drop down list choose either voided or canceled.

## Resolving HQ Deductions

For deductions of the type HQ, one or more of the following methods can be used:

- Applying credit memos
- Writing off all or part of a deduction
- Issuing chargebacks

### *To resolve HQ deductions*

- 1 Navigate to the Deductions screen > Deduction List view.
- 2 Drill down on the ID field hyperlink for a selected deduction, and click the Resolution view tab.
- 3 Apply a Credit Memo, if appropriate.
  - a In the Resolutions link bar, click the Credit Memo link, and create a new record.
  - b Click the select button in the Memo ID field, select a credit memo from the drop-down list, and enter the payment amount you are approving in the Amount field.
  - c Click OK to leave the Pick Allocation dialog box.
  - d Click Menu, and choose Submit or Submit All.
- 4 Write off all or part of a deduction, if appropriate.
  - a In the Resolutions link bar, click the Write Off link, and create a new record.
  - b Click Menu, and choose Submit or Submit All.
- 5 To reject part or all of the deduction, issue a chargeback:
  - a In the Resolutions link bar, click the Chargeback link, and create a new record.
  - b Click Menu, and choose Submit or Submit All.

The information you entered can be exported to your company's back-office information system. A member of the accounts receivable department can use this information to write a letter to the customer requesting payment of the chargeback amount.

Table 21 describes the behavior that occurs during the various status stages in the deduction resolution. The actions the system takes depends on both Payment Type and Status.

Table 21. Behavior For Status Stages In Deduction Resolutions

Resolution Method	Pending Status	Submitted Status	Paid Status
Payment (by trade funds)	<ul style="list-style-type: none"> <li>■ For the deduction, the Promotion field is updated with the amount of the record.</li> <li>■ For the deduction, the Remaining and Total Resolved fields are updated with the amount of the record.</li> <li>■ For the deal that is associated with the record, the Payments Pending field is updated with the amount of the record.</li> </ul>	<ul style="list-style-type: none"> <li>■ The end user manually changes the status of the record to Submitted.</li> <li>■ For the deal that is associated with the record, the Payments Pending field is decreased and the Payments Submitted field is increased by the amount of the record.</li> </ul>	<ul style="list-style-type: none"> <li>■ The back office updates the status of the record to Paid. (You can also do this by manually changing the status of the record to Paid.)</li> <li>■ For the deal that is associated with the record, the Payments Submitted field is decreased and the Payments Paid field is increased by the amount of the record.</li> <li>■ For the fund that is associated with the deal, the Payments field is updated.</li> <li>■ In the plan, promotion, and promoted products containing the deal, the Actual Funds field is updated with the amount of the record. For additional information, see <a href="#">"Rolling Up Paid Payments"</a> on page 160.</li> </ul>

Table 21. Behavior For Status Stages In Deduction Resolutions

Resolution Method	Pending Status	Submitted Status	Paid Status
Credit Memo	<ul style="list-style-type: none"> <li>■ For the deduction, the Credit Memo field is updated with the amount of the record.</li> <li>■ For the deduction, the Remaining and Total Resolved fields are updated with the amount of the record.</li> <li>■ For the credit memo that is associated with the deduction, the Payments Pending field is updated with the amount of the record.</li> </ul>	<ul style="list-style-type: none"> <li>■ The end user manually changes the status of the record to Submitted.</li> <li>■ For the credit memo that is associated with the record, the Payments Pending field is decreased and the Payments Submitted field is increased by the amount of the record.</li> </ul>	<ul style="list-style-type: none"> <li>■ The back office updates the status of the record to Paid. (You can also do this by manually changing the status of the record to Paid.)</li> <li>■ For the credit memo that is associated with the record, the Payments Submitted field is decreased, and the Payments Paid field is increased by the amount of the record.</li> </ul>
Chargeback	<ul style="list-style-type: none"> <li>■ For the deduction, the Chargeback field is updated with the amount of the record.</li> <li>■ For the deduction, the Remaining and Total Resolved fields are updated with the amount of the record.</li> </ul>	The end user manually changes the record status to Submitted.	The back office updates the status of the record to Paid. (You can also do this by manually changing the status of the record to Paid.)
Write-off	<ul style="list-style-type: none"> <li>■ For the deduction, the Write Off field is updated with the amount of the record.</li> <li>■ For the deduction, the Remaining and Total Resolved fields are updated with the amount of the record.</li> </ul>	The end user manually changes the status of the record to Submitted.	The back office updates the status of the record to Paid. (You can also do this by manually changing the status of the record to Paid.)

**NOTE:** When a record is voided or cancelled, the system reverses the actions previously taken (as described in the preceding table).

## Analyzing Deductions

Key account managers, customer financial services representatives, and their managers can use various chart views to analyze deductions for an account.

### *To analyze an account's deductions*

- 1 Navigate to the Deductions screen.
- 2 In the Deductions link bar, click the Charts link.
- 3 Use the drop-down list to select the type of chart you want to view.

Available charts include Aging Analysis, Status and Priority Analysis, Account and Type Analysis, and Rep Workload Analysis.



# 11 Objectives

This chapter covers managing objectives using the Siebel Consumer Goods application. Topics include:

- ["About Objectives" on page 185](#)
- ["Scenario for Creating and Fulfilling Sales Objectives" on page 186](#)
- ["Process of Working with Objectives" on page 186](#)
- ["Creating an Objective" on page 187](#)
- ["Creating Recommended Activities for an Objective" on page 188](#)
- ["Targeting Accounts to Objectives" on page 190](#)
- ["Creating Child Objectives" on page 191](#)
- ["Changing the Dates for Objectives" on page 191](#)
- ["Applying Objectives" on page 192](#)
- ["Scheduling Store Visits" on page 192](#)
- ["Reviewing Objectives \(End User\)" on page 192](#)
- ["Changing the Status of Activities \(End User\)" on page 193](#)
- ["Checking the Status of Objectives \(End User\)" on page 194](#)
- ["About Configuring Objectives" on page 194](#)

## About Objectives

An objective is a sales goal established to introduce a new product, promote the sale of an existing product, or improve the presence a product has in the retail environment. It is applied to one or more retail store accounts and includes one or more recommended activities to be performed by salespersons as they visit the stores belonging to the target accounts to which the objective is applied.

Organizations often create objectives to support a corporate promotion or merchandising strategy. When used with recommended activities, objectives help to coordinate your sales force. Salespersons benefit by being aware of objectives that are targeted at their retail stores and what their managers consider important activities to perform during their store visits.

Ideally, objectives are implemented at the beginning of a planning cycle.

Objectives can be created for the entire corporation, for instance, to support a corporate promotion. In this case, the corporate objective is the parent objective, and regional, district, or key account managers can create child objectives of this parent to support the goals of the corporate objective.

Alternatively, a retail sales manager can create an objective and activities specifically for the retail sales representatives in the region to support sales goals specifically for that region.

## Scenario for Creating and Fulfilling Sales Objectives

This scenario is an example of a process flow performed by a retail sales manager and sales representatives to create and fulfill sales objectives. Your company might follow a different process flow according to its business needs.

A large food manufacturer has developed a new beverage, and plans to test its consumer appeal by introducing it in southern France. One retail sales manager's territory is the southern region of France. The sales manager is responsible for making sure that the sales representatives reporting to her take the actions necessary to have a successful launch of this new beverage.

The retail sales manager begins by creating an objective named Southern France New Beverage Launch. Next, she adds three recommended activities that she wants each member of her sales force to carry out to meet this objective:

- Meet with a manager to make sure the new beverage is priced properly.
- Take a retail order to make sure there is enough new beverage in stock.
- Perform a retail audit to verify the new beverage is correctly positioned on store shelves.

To communicate the importance of these activities to her sales force, she assigns the priority 1-ASAP to all three recommended activities. She also adds a product fact sheet to the objective as a literature item. Her sales representatives can use this fact sheet to gain valuable information about the new beverage prior to visiting accounts. Finally, she adds every account in southern France to the objective, ensuring that it is delivered to the account team members of the accounts that have been selected. These activities become available to the representatives to associate with the outlet visits they plan for the upcoming business cycle.

When the sales representatives for southern France check their calendars, they can see that the retail sales manager has scheduled a series of store visits for them to complete. As they prepare for each of these visits, they can review the objective and the recommended activities she has created, along with the product fact sheet she added. Later, as the new beverage launch is in progress and the sales representatives are performing store visits, the manager or sales representatives can review the objective and note whether its related recommended activities have been completed.

## Process of Working with Objectives

This topic lists the tasks typically performed by administrators and end users when managing objectives. Your company might follow a different process according to its business requirements.

### Administrator Setup Procedures

The following list shows tasks administrators typically perform to manage objectives:

- 1 ["Creating an Objective" on page 187](#)

- 2 [“Creating Recommended Activities for an Objective” on page 188](#)
- 3 [“Targeting Accounts to Objectives” on page 190](#)
- 4 (Optional) Adding Literature to an Objective in *Siebel Fundamentals*
- 5 (Optional) Associating Promotions with an Objective in [Chapter 8, “Trade Promotions”](#)
- 6 (Optional) [“Changing the Dates for Objectives” on page 191](#)
- 7 (Optional) [“Creating Child Objectives” on page 191](#)
- 8 [“Applying Objectives” on page 192](#)
- 9 [“Scheduling Store Visits” on page 192](#)

### End-User Procedures

The following list shows tasks end users typically perform to access and use objectives:

- 1 [“Reviewing Objectives \(End User\)” on page 192](#)
- 2 Performing Recommended Activities in [Chapter 12, “Retail Execution”](#)
- 3 (Optional) [“Changing the Status of Activities \(End User\)” on page 193](#)
- 4 [“Checking the Status of Objectives \(End User\)” on page 194](#)

In general, retail sales representatives do not create objectives, but instead use objectives to direct the activities they perform during customer visits. They use the Objectives screen to review objectives, recommended activities, target accounts, and literature that applies to the retail stores and accounts they call on.

For details about how retail sales representative use the retail execution feature to carry out recommended activities, see [Chapter 12, “Retail Execution.”](#)

### Administrator and End-User Maintenance Procedures

During the campaign, retail sales managers and sales representatives check on the status of the objectives and associated activities.

[“Checking the Status of Objectives \(End User\)” on page 194](#)

## Creating an Objective

You must complete this task before performing the remaining tasks in this chapter.

This task is a step in [“Process of Working with Objectives” on page 186.](#)

### *To create an objective*

- 1 Navigate to the Objectives screen > Retail Objective List view.

- In the Objectives list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Description	The purpose of the objective.
End Date	The ending date of an objective. It must fall within the objective's time period.
Objective	The name of the objective.
Organization	The organization constrains the target accounts that are available to associate with the objective.
Parent Objective	<p>The name of an objective's parent objective, if applicable. The parent objective defines some of the criteria for its child objectives. For instance, child objectives are constrained to the products associated with the parent objective, if any.</p> <p>You can create parent objectives without completing the Parent Objective field. You <i>must</i> complete the Parent Objective field when creating child objectives.</p> <p>Parent-child relationships between Objectives can be viewed in the Objectives Explorer view.</p>
Period	The period of time during which an objective must be completed.
Product	The product or products that you want to associate with this objective.
Start Date	The beginning date of an objective. It must fall within the objective's time period.
Team	Multiple people can be assigned to the Objective's team, and any user with the ability to create objectives can assign objective team members.
Type	The type of objective being created; for example, a promotion or a marketing type of objective.

If you want to create recurring objectives, you can do the following:

- Change the period of an existing objective (if no visits have been scheduled).
- Copy an existing objective and apply a new period to it.
- Use a workflow to schedule monthly visits. For more information, see the *Siebel Business Process Framework: Workflow Guide*.

## Creating Recommended Activities for an Objective

You can add one or more recommended activities to an objective. Recommended activities:

- Are associated with every target account added to the objective.

- Are not assigned to individuals because they are used when planning visits to all of the targeted accounts.
- Can optionally be associated with individual products if certain activities apply to specific products.

This task is a step in [“Process of Working with Objectives”](#) on page 186.

**To add recommended activities to an objective**

- 1 Navigate to the Objectives screen > Retail Objective List view.
- 2 In the Objectives list, drill down on the Objective field hyperlink for the record to which you want to add an activity.
- 3 Click the Activities view tab, create a new record in the Activities list, and complete the necessary fields.

Some fields are described in the following table.

Fields	Comments
Activity Type	The type of activity to be performed; for example, a retail assessment or presentation.
Assessment Template	The name of the assessment template assigned to the recommended activity. If the recommended activity requires an assessment to be carried out, the relevant assessment template can be associated with the recommended activity. For information about assessment templates, see the <i>Siebel Applications Administration Guide</i> .
Earliest Start	The suggested date the recommended activity begins; the default is the objective period start date. If you choose to edit it, the date must fall within the period assigned to the parent objective.
Latest Finish	The suggested date the recommended activity ends; the default is the objective period end date. If you choose to edit it, the date must come after the Earliest Start date for the recommended activity and must fall within the period assigned to the parent objective.
Products	Each activity can have one or more products associated with it. The choice of products is restricted to products that are already associated with the objective.
Required	Select to indicate the activity must be addressed (done or rescheduled) before the representative completes a visit.

Fields	Comments
Routine	<p>Select to indicate that the activity applies to every retail visit. For example, even after a representative completes the activity on a visit, the activity appears on every subsequent visit that is planned between the activity's Earliest Start and Latest Completion dates.</p> <p>Clear this field to indicate that the activity is nonroutine. Therefore, when the activity has been completed or when the date of the visit is greater than the activity's Latest Completion date, the activity is no longer available to be applied to visits.</p>
Role	If you are using Territory Management, use this field to assign the activity only to positions that have this role.
Category	If you are using Territory Management, use this field to assign the activity only to positions that are associated with this category.
Assign To All	<p>If this is selected, the activity is created for each member of the account team. If this is not selected, the activity is created only for the primary member of the account team.</p> <p>Do not select this field if you are using the Role and Category fields.</p>

## Targeting Accounts to Objectives

You need to associate one or more accounts to an objective. Accounts associated with objectives are referred to as target accounts. When the objective is applied, the objective's activities are used as templates to create activities for each of the target accounts.

The accounts that are available as targets are those accounts that belong to the organization of which the user is an account team member.

This task is a step in ["Process of Working with Objectives"](#) on page 186.

### *To add a target account to an objective*

- 1 Navigate to the Objectives screen > Retail Objective List view.
- 2 In the Objectives list, drill down on the Objective field hyperlink for the record to which you want to add a target account.
- 3 Click the Target Accounts view tab.
- 4 In the Target Accounts list, query for the account you want to add.
- 5 Select this account in the Target Accounts list.
- 6 Click Commit.

The account is added to the Accounts list and becomes a target account for the objective.

After you add a target account to an objective, you can delete the account if it no longer is associated with the objective.

***To delete a target account from an objective***

- 1 Navigate to the Objectives screen > Retail Objective List view.
- 2 In the Objectives list, drill down on the Objective field hyperlink for the record from which you want to delete a target account.
- 3 Click the Target Accounts view tab.
- 4 In the Accounts list, select the account you want to delete.
- 5 Click Uncommit.

The account is deleted from the Accounts list and is no longer a target account for the objective.

For information about target lists, see about global target list management in the *Siebel Applications Administration Guide*.

## Creating Child Objectives

You can associate smaller objectives with a larger objective. The associated products of the child objective are constrained by the parent objective.

This task is a step in ["Process of Working with Objectives"](#) on page 186.

***To make one objective the child of another***

- 1 Navigate to the Objectives screen > Retail Objective List view.
- 2 In the Objectives list, select the appropriate objective record.
- 3 In the Parent Objective field, select an objective to be the parent.

## Changing the Dates for Objectives

During the planning stages for an objective, you can change its start date and end date. Date changes that you make to an objective can be applied to its recommended activities by changing the dates for each activity manually. You can also apply date changes that you make to an objective to its recommended activities.

This task is a step in ["Process of Working with Objectives"](#) on page 186.

***To change the dates for an objective***

- 1 Navigate to the Administration - Data screen > Objectives view.
- 2 Select the Objective record for which you want to change the start date or end date.
- 3 Select a new start date or end date for the objective by using one of the following methods:
  - In the More Info form, select a new start date or end date for the objective.

- In the Period field, select a new time period for the objective.

The start date and end date are automatically set to the first and last dates in the period.

The Start and End Dates must fall within the date period of the parent objective.

- 4 In the More Info form, click Apply Period.

The Earliest Start and Latest Completion dates of all recommended activities for the objective are reset to the Earliest Start and Latest Completion dates of the objective.

## Applying Objectives

After you have added all the necessary information to an objective, you must apply the objective. This allows the objective to be modified and updated before its contents are released to end users.

This task is a step in [“Process of Working with Objectives”](#) on page 186.

### *To apply an objective*

- 1 Navigate to the Objectives screen > Retail Objective List view.
- 2 In the Objectives list, drill down on the objective record.
- 3 Click the Target Accounts view tab.

**CAUTION:** Before you click Apply, be sure that all objective information is correctly entered. The system allows you to apply an objective only once. This restriction prevents creating multiple iterations of activities, which might miscommunicate what is required of end users.

- 4 In the Objective form, click Apply.

## Scheduling Store Visits

After completing the preceding tasks, you can schedule store visits for each account that has been added to the objective. There are two ways of scheduling store visits. Each makes use of a different feature:

- If your organization uses the Routes feature, see [“Using Routes to Schedule Visits \(End User\)”](#) on page 215.
- If your organization uses the Retail Execution feature, see [“Planning Retail Visits \(End User\)”](#) on page 199.

This task is a step in [“Process of Working with Objectives”](#) on page 186.

## Reviewing Objectives (End User)

When end users navigate to the Objectives screen, the default filter used on the Objectives list is My Objectives. The remaining view tabs and fields visible to the end users in the Objectives screen are identical to those available to the administrator.



This task is a step in [“Process of Working with Objectives”](#) on page 186.

### *To review objectives*

- 1 Navigate to the Objectives screen > Retail Objective List view.  
The default filter used on the Objectives view and the additional filters available depend on the end user’s responsibilities.
- 2 From the visibility filter, select the appropriate filter:
  - **My Objectives.** Objectives for which the user is assigned to the team.
  - **My Team’s Objectives.** All Objectives within a manager’s team, including their own.
  - **All Objectives.** All Objectives for the user’s organization.
  - **All Objectives Across Organizations.** All Objectives across all organizations within the implementation.
- 3 Drill down on the objective record.
- 4 Use the view tabs to review activities, target accounts, and other information about the objectives.

For more information about navigating the standard Siebel interface, including using the Explorer tree, see *Siebel Fundamentals*.

## Changing the Status of Activities (End User)

After performing the recommended activities, you can change the status of activities. Changing the status of activities allows you to communicate to others that the activity is in progress, completed, or rescheduled.

This task is a step in [“Process of Working with Objectives”](#) on page 186.

### *To change the status of activities associated with an objective*

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Drill down on the Name field in the account record, and click the Outlet Visits view tab.
- 3 In the Outlet Visits list, select a visit by drilling down on the Description field.
- 4 In the Activities list, change the Status field of the activity.

**NOTE:** You can view the status of Activities by navigating to the Administration - Data screen > Objectives view > Account Status subview > Recommended Activities list. This view is read-only; thus, you cannot change an activity’s status in this view.

## Checking the Status of Objectives (End User)

You can use the Account Status view or a graphical Chart to check objectives and the status of your recommended activities or the recommended activities of your employees.

This task is a step in [“Process of Working with Objectives”](#) on page 186.

### *To check the status of an objective and its activities*

- 1 Navigate to the Objectives screen > Retail Objective List view.
- 2 Select the objective record for which you want to review the status.
- 3 Drill down on the Objective field hyperlink for the record, and click the Account Status view tab.
- 4 Select the account record for which you want to review the status.

The recommended activities associated with the account are displayed in the Recommended Activities subview. You can check the status of each recommended activity.

### *To check the status of an objective on a chart*

- 1 Navigate to the Objectives screen > Charts view.
- 2 Select the objective record for which you want to review the status.
- 3 Choose from the charts available using the Charts visibility filter.

## About Configuring Objectives

This topic contains information that might be useful to configurators making changes to this module.

The procedures documented in this chapter include buttons that invoke specialized methods, as described in [Table 22](#).

Table 22. Buttons And Methods For Objectives Configurators

Button	Method	Description	Supported On
Commit	CommitAcct	Writes account names from temporary targeting tables to permanent tables where objectives are stored.	Applet Layer
Apply	ScheduleVisits	For all the recommended activities in the objective, copies the activities and associates them with each account in the objective. The assignment of the activities depends on the way the recommended activities have been set up.	Applet Layer

If Territory Management is to be used, then you must either flag each recommended activity as Assign to All or define a role or category to which the activity is assigned. [Table 23](#) details the ways in which activities must be assigned if Territory Management is used.

Table 23. The Ways in Which Activities Must Be Assigned If Territory Management Is Used

Assign To All	Role/Category	Routine	Result
Y	N	Y	Creates one activity record for each team member, and marks each one as a routine activity.
Y	N	N	Creates one activity record and assigns all team members to the same activity.
N	Y	Y	Creates one activity record and assigns a specific team member based on the member's role-category match and marks the activity as a routine activity.
N	Y	N	Creates one activity record and assigns primary and specific team members based on the member's role-category match.



# 12 Retail Execution

This chapter covers the retail execution procedures performed by retail sales representatives and their managers. Topics include:

- [“About Retail Execution” on page 197](#)
- [“Scenario for Retail Execution” on page 198](#)
- [“Process of Performing Retail Execution” on page 198](#)
- [“Preparing for Retail Visits \(End User\)” on page 199](#)
- [“Planning Retail Visits \(End User\)” on page 199](#)
- [“Starting Retail Visits \(End User\)” on page 201](#)
- [“Performing Retail Activities \(End User\)” on page 201](#)
- [“Creating Retail Activities \(End User\)” on page 205](#)
- [“Reviewing Account Information \(End User\)” on page 206](#)
- [“Ending a Retail Visit \(End User\)” on page 207](#)
- [“About Configuring Retail Execution” on page 208](#)

## About Retail Execution

The Retail Execution module helps retail sales representatives plan, schedule, execute, and review sales visits to retail outlets. It provides views that allow retail sales representatives to perform a variety of retail visit activities, including the following:

- Planning visits and associating activities with those visits
- Performing retail assessments
- Performing retail audits
- Reviewing store conditions, historical audit data, required product distribution, and current promotions (planned and underway)

Whether retail managers use the Objectives module to schedule recommended activities, or plan them directly in the Activities module, retail sales representatives can use the Retail Execution module to undertake those activities in specifically assigned visits. For more information about objectives, see [Chapter 11, “Objectives.”](#)

If retail managers use the Routes module to schedule visits, retail sales representatives and their managers can use the Retail Execution module to plan and carry out those scheduled retail visits. For more information about routes, see [Chapter 13, “Routes.”](#)

## Scenario for Retail Execution

This scenario is an example of a process flow performed by retail sales representatives. Your company might follow a different process flow according to its business requirements.

A retail sales representative for a large food manufacturer visits a series of retail outlets in southern France each week. He is responsible for meeting with the retail outlet manager and performing various retail activities, such as taking retail orders, conducting retail audits, and promoting sales objectives established by his manager.

Each morning, he checks his calendar and starts planning his visits for the day. He begins by reviewing activities from prior visits, noting any outstanding issues that require special attention, and checking for any objectives that have been assigned to his accounts.

Today, he notices that a new objective named Southern France Beverage Launch has been created for one of the accounts he is scheduled to visit. The following list of activities has also been included:

- Meet with the retail manager to make sure the new beverage is priced correctly.
- Conduct a retail audit of the beverage to make sure it is correctly positioned on store shelves.
- Place point-of-sale coupons in the retail outlet.
- Undertake a retail assessment to gain competitive intelligence.

The first two activities have a priority of 1-ASAP, and he feels comfortable he can complete them in the time he has been asked to spend in this account. As he has only one hour to spend at this account, he defers the remaining two activities until a subsequent visit.

Before entering the retail outlet, he records the start time of the visit. While in the store, he performs the activities and takes notes to be used when planning future visits. He also reviews audits previously completed, the products carried, and the promotions currently being run in this account. After completing the retail visit, he records the ending time of the visit and changes the status of the activities he performed to Done.

## Process of Performing Retail Execution

This is an example process flow for performing retail execution. Your company might follow a different process flow according to its business requirements. Retail execution is typically performed by end users such as retail sales representatives. To perform retail execution, end users must complete the following tasks in the order given:

- 1 [“Preparing for Retail Visits \(End User\)” on page 199](#)
- 2 [“Planning Retail Visits \(End User\)” on page 199](#)  
**NOTE:** This procedure is optional if you use the Routes module to schedule store visits.
- 3 [“Starting Retail Visits \(End User\)” on page 201](#)
- 4 [“Performing Retail Activities \(End User\)” on page 201](#)
- 5 (Optional) [“Creating Retail Activities \(End User\)” on page 205](#)
- 6 [“Reviewing Account Information \(End User\)” on page 206](#)

7 “Ending a Retail Visit (End User)” on page 207

## Preparing for Retail Visits (End User)

Preparing for a retail visit involves reviewing prior visit activities for an account and reviewing an account’s objectives.

This task is a step in “Process of Performing Retail Execution” on page 198.

### *To review the activities from a prior visit*

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Drill down on the Name field hyperlink for the selected account record, and click the Outlet Visits view tab.
- 3 In the Outlet Visits list, drill down on the Planned Start field hyperlink of the prior visit you want to review.

The Visit Execution screen appears. In the Visit form, the selected visit appears. In the Activities list, the activities that you performed during that visit appear.

- 4 In the Activities list, drill down on the Activity Type field hyperlink for the activity you want to review.

Information you recorded during this activity appears. The view that is displayed varies depending on the activity type.

- 5 Use the browser Back button to return to the Visit Execution screen.

Repeat [Step 4](#) and [Step 5](#) for each activity you want to review.

### *To review an account’s objectives*

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Drill down on the Name field hyperlink for a selected account record and click the Objectives view tab.

The Objectives list displays all of the objectives that have been targeted to the account.

- 3 Check the Start Date and End Date fields for each objective to identify active objectives.
- 4 Drill down on the Objective Name field hyperlink of active objectives to identify targeted accounts and activities to which you are assigned.

## Planning Retail Visits (End User)

After preparing for a retail visit by reviewing prior visit activities and account objectives, you are ready to plan the visit.

There are two ways to plan retail visits. Each way makes use of a different module.

- If your organization uses the Routes module, see [“Using Routes to Schedule Visits \(End User\)”](#) on page 215.
- If your organization uses the Retail Execution module, perform the procedure described in this topic.

Planning retail visits involves the following tasks:

- Selecting an account to visit.
- Selecting activities for the visit.

**NOTE:** If you want to create new recommended activities, use the Objectives module. For more information, see [“Creating Recommended Activities for an Objective”](#) on page 188.

- Scheduling the visit.
- Checking for activities that have been created since a visit was planned.

The following procedure incorporates these tasks and describes the steps required to plan a retail visit.

This task is a step in [“Process of Performing Retail Execution”](#) on page 198.

### ***To plan a retail visit***

- 1 Navigate to the Visit Planning screen.
- 2 In the Available Accounts list, select the account for which you want to schedule a visit.
- 3 In the Available Activities list, select the activities you want to apply to the visit, and click Schedule.

If the activity you want to add is associated with the account, but not on the list, you must select the Assign To All field for the activity in the account to make the activity available on the list. (Navigate to the Accounts screen > Accounts List view, drill down on the Name field hyperlink for the account, and select the Assign To All field in the Activities view tab.)

- 4 In the Schedule Visit dialog box, complete the necessary fields, and click OK.

The new visit appears in the Scheduled Visits list, and all the activities applied to that visit appear in the Scheduled Activities list.

- 5 (Optional) If time has elapsed since the original scheduling of the visit and if additional activities have since been created, retrieve the new activities:
  - a In the Scheduled Visits list, click Update.
  - b In the Available Activities list, select and apply the new activities to your previously scheduled visit.

**NOTE:** Alternatively, you can click Update in the Visit Execution screen to apply all outstanding activities to a single visit.



## Starting Retail Visits (End User)

After completing the preceding tasks, retail sales representatives are now ready to start the retail visit.

This task is a step in [“Process of Performing Retail Execution” on page 198](#).

### *To begin a retail visit*

- 1 Navigate to the Visit Planning screen.
- 2 In the Scheduled Visits list, select a visit record you are starting, and drill down on the Planned Start field hyperlink.

The Visit Execution screen appears and the Activities list displays the selected retail activities for the visit.

**NOTE:** You can also navigate directly to the Visit Execution screen, which displays the earliest planned visit with a status not equal to Done.

- 3 (Optional) Click Update in the visit form, to automatically apply all activities to the visit, including those created since the visit was planned.
- 4 In the visit form, click Start Visit.

## Performing Retail Activities (End User)

During the visit, the retail sales representative performs activities selected for this visit. These activities can include the following:

- [“Performing Merchandising Audits” on page 202](#)
- [“Performing a Retail Assessment” on page 203](#)
- [“Exchanging Products Between Sales Representatives” on page 203](#)
- [“Performing a Retail Audit” on page 204](#)
- [“Reviewing Store Conditions” on page 204](#)

**NOTE:** The following procedures assume that new activities need to be created. In many cases, you do not have to create a new activity because it is already created as a recommended activity for the applicable objective you are working on.

This task is a step in [“Process of Performing Retail Execution” on page 198](#).

## Performing Merchandising Audits

To clearly communicate how an account is displaying the company's products, retail sales representatives perform merchandising audits. Merchandising audits allow representatives to record the status of a specific merchandising location at a point of time. Criteria are set at the company level and then compared and recorded against the merchandising location.

**NOTE:** You must have already added merchandising locations to the appropriate account to perform the following procedure. For more information, see ["Adding Merchandising Locations to Accounts \(End User\)"](#) on page 41.

### *To perform a merchandising audit*

- 1 Navigate to the Visit Execution screen, and locate your visit in the visit form.
- 2 In the Activities list, create a new record with an activity type of Merchandising Audit.
 

**NOTE:** For information about adding an activity to an account visit, see ["Creating Retail Activities \(End User\)"](#) on page 205.
- 3 In the Activity Type field, drill down on the Merchandising Audit hyperlink you have just created.
- 4 In the Merchandising Audit list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Name	The name of the Inventory location that you want to audit.
Entry Compliance	Record the entry compliance against the criteria agreed upon at the company level.
Exit Compliance	If you make any changes to the merchandising location that qualify for a status change, record your changes.
Shelf Space	Record the percentage of the merchandising location given to the company's products.
Last Relay	(Optional) If a full relay of the display is performed, enter the current date. Recording the last relay date allows representatives to see the level of maintenance required to keep the display compliant over a period of time.

- 5 When you are finished conducting the audit, in the Account Activity form, choose Done from the Status field drop-down list.

### Related Topics

["Adding Merchandising Locations to Accounts \(End User\)"](#) on page 41

["Associating Account Products with Merchandising Locations \(End User\)"](#) on page 65

## Performing a Retail Assessment

Retail assessments measure an account against a set of predefined attributes. Typically, the predefined attributes are created as assessment templates. The assessment template can help to determine the possibility of introducing a new product or measure the retail presence of a competitor.

For information about creating assessment templates, see the topic about setting up assessment templates in the *Siebel Applications Administration Guide*.

### *To perform a retail assessment*

- 1 Navigate to the Visit Execution screen, and locate your visit in the visit form.
- 2 In the Activities list, create a new record with an activity type of Retail Assessment.
 

**NOTE:** For information about adding an activity to an account visit, see [“Creating Retail Activities \(End User\)” on page 205](#).
- 3 In the Activity Type field, drill down on the Retail Assessment hyperlink you have just created. The Assessments view in the Accounts screen appears. The current account is displayed in the Account form.
- 4 In the Assessments list, select the assessment you want to perform during this visit.
- 5 In the Assessment Attributes list, fill in the fields for each assessment attribute.

## Exchanging Products Between Sales Representatives

If insufficient quantities are loaded on the van, additional stock can be loaded on the van by completing a stock transfer. To exchange products between two sales representatives, each representative must complete the following procedure.

### *To exchange products with another sales representative*

- 1 Navigate to the Visit Execution screen, and locate your visit in the visit form.
- 2 In the Activities list, create a new record with an activity type of Stock Transfer.
- 3 In the Activity Type field, drill down on the Stock Transfer hyperlink you just created. The Part Tracker view in the Activities screen appears.
- 4 Create a new record in the Part Tracker view.
- 5 Set the values for the Source and Destination fields, as follows:
  - If you are taking product from your van, select Trunk from the Source field and Customer from the Destination field.
  - If you are adding inventory to your van, select Customer from the Source field and Trunk from the Destination field.
- 6 Click Commit to update the inventory.

## Performing a Retail Audit

Sales representatives perform retail audits to check that products are correctly priced, positioned, and stocked at retail outlets. You can conduct retail audits on your own organization's products and a competitor's products.

You must complete the following tasks before performing a retail audit on a competitor's products:

- Create the competitive product and add it to the product-category hierarchy. For information about performing this task, see ["About Creating and Modifying Distribution Lists" on page 55](#).
- Set up product distribution lists. A competitor's product must appear on an authorized product distribution list before it can be included in a retail audit. For information about performing this task, see ["About Creating and Modifying Distribution Lists" on page 55](#).

### *To perform a retail audit*

- 1 Navigate to the Visit Execution screen and locate your visit in the visit form.
- 2 In the Activities list, create a new record with an activity type of Retail Audit.  
**NOTE:** For information about adding an activity to an account visit, see ["Creating Retail Activities \(End User\)" on page 205](#).
- 3 In the Activity Type field, drill down on the Retail Audit hyperlink you have just created.  
The Retail Audit view appears.
- 4 In the Retail Audit link bar, click the Retail Audit link, and then click List Products.  
A list of all the products authorized for distribution to the account and designated for a retail audit appears in the Retail Audit list. The list includes products from your organization and competitive products.
- 5 In the Retail Audit list, select a product record for which you want to perform a retail audit.
- 6 Scroll down to the Product form, and record observations about the conditions of the selected product in the appropriate fields.
- 7 When you are finished conducting the audit, scroll back to the Account Activity form, and choose Done from the Status field drop-down list.

## Reviewing Store Conditions

Retail sales representatives periodically review the store conditions of an account. The review measures store conditions over time and is useful for managers who are analyzing an account.

### *To review store conditions*

- 1 Navigate to the Accounts screen > Accounts List view.
- 2 Select the account for which you want to review store conditions.
- 3 Drill down on the Name field hyperlink, and then click the Store Conditions view tab.

- 4 In the Store Conditions Product list, select the product record for which you want to check store conditions.

A list of previous store condition reviews appears in the Store Conditions list below the Store Conditions Product list.

- 5 To view a graphical representation of changes in the Price Point or Facing Number between various store condition reviews, from the Store Conditions drop-down list, choose Store Condition Chart.

## Creating Retail Activities (End User)

If you want to perform additional available retail activities or new activities that have not been previously planned, you can add them during the visit.

This task is a step in [“Process of Performing Retail Execution” on page 198](#).

### *To add an available retail activity*

- 1 Navigate to the Visit Execution screen, and locate your visit in the visit form.
- 2 From the visit form, locate the account record to which you want to add an available activity.
- 3 Click the Update button to add available activities to this visit.
- 4 In the Available Activities list, select the activity record you want to add.

If the activity you want to add is associated with the account, but not on the list, you must select the Assign To All field for the activity in the account to make the activity available on the list. (Navigate to the Accounts screen > Accounts List view, drill down on the Name field hyperlink for the account, and select the Assign To All field in the Activities view tab.)

### *To create a new retail activity*

- 1 Navigate to the Visit Execution screen, and locate your visit in the visit form.
- 2 In the Activities list, click New.
- 3 Complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Alarm	Select this check box to enable an alarm for this activity.
Assessment Template	The name of the assessment template assigned to the activity. If the activity requires an assessment, the relevant assessment template can be associated with the activity. For more information about assessment templates, see the <i>Siebel Applications Administration Guide</i> .
Assigned To	To delegate the activity to someone else, select the appropriate employee.

Field	Comments
Last Name	The last name of the contact person for the activity.
New	This field is automatically selected when a visit is first created. Later, you can clear this field to indicate the visit is no longer new.
Products	Displays products associated with the activity.
Required	Select this check box to designate an activity that must be completed or rescheduled before ending a visit.
Started	This field is automatically filled with the time at which the activity was created. Change this setting if necessary.
Status	The status of the activity. For example, In Progress.
Suppress Calendar	If selected, the activity does not appear in the Calendar views.

## Reviewing Account Information (End User)

During the visit, the retail sales representative might want to review and discuss the account's performance indicated by retail and merchandising audits, products listed for the account, and the promotions assigned to the account.

This task is a step in ["Process of Performing Retail Execution"](#) on page 198.

### *To review account audit information*

- 1 Navigate to the Visit Execution screen, locate your visit in the visit form, and then click the Account Audits view tab.
- 2 Toggle between the Retail Audit list and the Merchandising Audit list by using the Account Audits drop-down list.
  - The Retail Audit list provides a list of retail audit products for the current account from the last 65 days.
  - The Merchandising Audit list provides the merchandising audit locations for the current account from the last 95 days.

### *To review account products*

- 1 Navigate to the Visit Execution screen, and locate your visit in the visit form.
- 2 Click the Account Products view tab.

### *To review account promotions*

- 1 Navigate to the Visit Execution screen, and locate your visit in the visit form.

- 2 Click the Account Promotions view tab.

## Ending a Retail Visit (End User)

After performing the selected retail activities and reviewing account information, the retail sales representative is now ready to end the retail visit.

**NOTE:** If there are required activities remaining for the visit, you must complete or reschedule these activities before you can end the visit.

This task is a step in [“Process of Performing Retail Execution” on page 198.](#)

### *To end a retail visit*

- 1 Navigate to the Visit Execution screen and locate your visit in the visit form.
- 2 Click End Visit.

## About Configuring Retail Execution

This topic contains information that might be useful to configurators making changes to the product distribution features.

The procedures documented in this chapter include buttons that invoke specialized methods, as described in [Table 24 on page 208](#).

Table 24. Buttons And Methods For Retail Execution Configurators

Button	Method	Description	Supported On
Update	OnSetUpVisits	Applies recommended activities to selected visit.	Bus Comp Layer
List Products (Retail Audit List)	InstantiateAcctMerchLocProducts	Finds all products that belong to merchandising location and have retail audit flag set. Adds them as products to account activity for parent account.	Applet Layer
List Products (Retail Audit)	InstantiateAccountProducts	Adds all authorized products to parent account activity.	Applet Layer



# 13 Routes

Retail sales managers can create routes and schedule visits for the sales representatives that they manage. This chapter describes how to organize retail accounts into routes, use routes to schedule visits, and maintain routes that frequently change. Topics include:

- ["About Routes" on page 209](#)
- ["Scenarios for Creating and Using Routes" on page 209](#)
- ["Process of Creating and Using Routes" on page 211](#)
- ["Creating Routes \(End User\)" on page 211](#)
- ["Adding Accounts to Routes \(End User\)" on page 212](#)
- ["Assigning Target Lists to Routes \(End User\)" on page 214](#)
- ["Using Routes to Schedule Visits \(End User\)" on page 215](#)
- ["About Configuring Routes" on page 216](#)

## About Routes

A route specifies the order in which the accounts are visited and the starting time for each visit. Routes are used to schedule visits to groups of retail accounts that are visited regularly, and on the same day or series of days, by a retail sales representative. You can also schedule nonroutine visits to accounts by assigning target lists created in Account Targeting. By arranging a group of accounts into an efficient route, you can make sure that retail sales representatives minimize the amount of time spent traveling between accounts.

After it has been created, a route can be used repeatedly to schedule store visits to the accounts in the route. You can also create routes to schedule store visits for a specific period of time in support of a promotion, campaign, or objective.

## Scenarios for Creating and Using Routes

These scenarios are examples of a process performed by retail sales managers and retail sales representatives. Your company might follow a different process according to its business requirements.

- ["Creating Routes for Retail Sales Representatives" on page 210](#) illustrates how retail sales representatives can use the Routes views to organize retail accounts into routes and use routes to schedule visits.
- ["Retail Managers Creating Routes for Sales Representatives" on page 210](#) illustrates how retail sales managers can create routes and schedule visits for the retail sales representatives they manage.

- [“Creating Routes That Change Frequently” on page 211](#) demonstrates how retail sales managers and retail sales representatives can create and manage routes that change frequently.

## Creating Routes for Retail Sales Representatives

A retail sales representative for a large beverage manufacturer has a sales territory covering a large section of central Virginia. She is responsible for visiting each of the large grocery stores in her territory once a month. Most of her accounts are in Richmond, a large city. However, she is also responsible for visiting grocery stores in several small cities. Because she always visits the same accounts, in the same order, she decides to organize her accounts into efficient routes that she can use each month to schedule her visits.

The retail sales representative begins by creating a series of routes for the accounts in the Richmond area. Each route covers a group of accounts from one geographical area, such as northeast Richmond, that can be visited in one day. Next, she creates a four-day route that includes all her accounts in the outlying portions of her sales territory. Day one of the route takes her to accounts in Danville and Pulaski. The following three days take her to accounts in Roanoke, Lynchburg, and Charlottesville.

After she finishes creating her routes, she uses them to schedule visits to all the accounts in her territory for the upcoming month. She specifies the date on which the route begins. Additional details, such as the starting time and duration of each visit, are determined by information she entered when she set up the route. Each month she can again use the routes that she has created to schedule account visits.

## Retail Managers Creating Routes for Sales Representatives

A retail sales manager for a large beverage manufacturer manages 12 retail sales representatives working in the Baltimore-Washington area of the eastern United States. One of his representatives, a new employee, is not familiar with her territory, which includes several grocery stores and drugstores in the District of Columbia. The retail sales manager is familiar with this area, so he takes on the task of organizing the new representative's accounts into a series of routes. Each route covers one section of the District. The accounts in each route need to be visited every two weeks. Therefore, he decides to create 10 routes—one for each workday in a two-week period. Each route includes six or seven stores in one neighborhood, such as Georgetown, and can be completed in one day.

When he finishes creating the routes, he uses them to schedule a month's worth of store visits for the new sales representative. The retail manager schedules the first route to begin on the first and third Mondays of the month, the second route to begin on the first and third Tuesdays of the month, and so forth, so that each route is scheduled to be completed twice during the month. The starting time and duration of each store visit are determined by information he entered when he set up the routes.

When the retail sales representative becomes familiar with the area, the retail manager gives the representative the task of maintaining her own routes. The retail sales representative can now add new accounts to a route, change the order in which routes are visited, or adjust the starting times and durations of the visits.

## Creating Routes That Change Frequently

A brand manager at the beverage manufacturer establishes a promotion that will run for the next two weeks. The retail sales manager for the beverage manufacturer reviews the promotion criteria to get an exact understanding of the target group of accounts, and concentrates on managing the retail execution with retail sales representatives. He sends an email message to his sales team detailing the criteria they must use when generating their account lists and telling them to schedule a new call cycle for the promotion.

One of the retail sales representatives who reports to the retail manager is planning for the next week. She receives the email message and decides to plan her route immediately. In her local database, she generates a target list. When she has generated an optimal list of target accounts, she creates a new route and applies the target list to it. Finally, she schedules visits over the next two weeks for all of the accounts in the target list.

## Process of Creating and Using Routes

This is an example process for planning routes. Your company might follow a different process according to its business requirements.

Routes are typically created either by end users, such as retail sales representatives, or by a retail sales manager and assigned to a retail sales representative. To create a route and use it to schedule store visits, complete the following tasks, in the order in which they are listed:

- 1 [“Creating Routes \(End User\)” on page 211](#)
- 2 [“Adding Accounts to Routes \(End User\)” on page 212](#)
- 3 (Optional) [“Assigning Target Lists to Routes \(End User\)” on page 214](#)
- 4 [“Using Routes to Schedule Visits \(End User\)” on page 215](#)

**NOTE:** Do not specify a start date because the route can be used repeatedly to schedule visits.

**NOTE:** When creating and scheduling a route with a limited duration, such as in support of a promotion, you can perform all of the preceding steps in the Target Accounts view.

## Creating Routes (End User)

Routes are created to manage the scheduling of retail visits to accounts within a given geographical area.

This task is a step in [“Process of Creating and Using Routes” on page 211](#).

### Guidelines for Creating Routes

The following are guidelines for creating routes:

- You must specify the person for whom you are creating the route (generally, either a retail sales manager or a retail sales representative who reports to a retail sales manager).

## Routes ■ Adding Accounts to Routes (End User)

- A retail sales representative can be assigned many routes, but each route can be assigned to only one retail sales representative.
- A route can have any number of accounts.
- A route name cannot be used for more than one route assigned to a given retail sales representative. However, the same route name can be used for routes that are assigned to different retail sales representatives.
- If the route will be used repeatedly to schedule visits, do not specify a start date when creating the route.

### To create a route

- 1 Navigate to the Routes screen > Routes List view.
- 2 In the Routes list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Route Id	A unique system-generated number assigned to the route.
Route Name	A name for the route (for example, Northeast Richmond). A route name must be unique to the retail sales representative to which it is assigned.
Description	A description of the route.
Sales Person	The salesperson to whom the route is assigned. A route can be assigned only to one person.  In the My Routes view, the Sales Person field is automatically filled with the current user name. If you are assigning a route to someone other than yourself, enter that person's name in the Salesperson field.
Start Day	The day of the week on which the route is designated to begin. The Start Day is used only as reference information and does not prevent you from using the route to schedule visits starting on some other day of the week.
Active	Select to indicate the route is active and available for use in scheduling visits.
Last Updated	The time and date the route was last changed.

## Adding Accounts to Routes (End User)

When you have established a route, you can add accounts to it. There is no limit to the number of accounts that can be assigned to one route. Two views are available for adding accounts to routes:

- **Route Accounts.** Displays accounts in a list.

- **Route Explorer.** Displays routes and accounts in a hierarchical format.

**NOTE:** When you add accounts to a route using the Route Explorer view, the account record can be associated with the route based on a parent-child relationship. When you add accounts to a route using the Route Accounts view, you add an individual account record without needing to understand the account's relationship with other account records.

Separate procedures are provided in this topic for using each of these views.

**NOTE:** It is possible to pick any existing account in the database when associating an account with a route. When associating an account with a route, select only those accounts for which the owner of the route is represented on the sales team.

This task is a step in ["Process of Creating and Using Routes"](#) on page 211.

***To add accounts to a route using the Route Accounts view***

- 1 Navigate to the Routes screen > Routes List view.
- 2 Drill down on the Route Name field hyperlink for a selected route.
- 3 In the Accounts list, create a new record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comment
Call Duration	The scheduled duration of the account visit.  <b>NOTE:</b> In Siebel Tools, this field has a Predefault Value of 5. Do not edit this predefault value. Changing this value leads to an error when target accounts are committed.
Call Time	The current time. Edit this field to reflect the time when the account is to be visited.
Offset Day	Allows you to create routes that span more than one day. It indicates the number of days after the beginning of the route that an account is visited. For example, if an account is to be visited on the first day of a route, this field is set to 0. If the account is to be visited on the second day of a route, this field is set to 1.
Last Call	Identifies the date and time of the most recent visit to this account.

- 4 Repeat [Step 3](#) for each account you want to add to the route.

***To add accounts to a route using the Route Explorer view***

- 1 Navigate to the Routes screen > Routes List view.
- 2 Drill down on the Route Name field hyperlink for a selected route, and click the Explorer view tab.

- 3 In the Routes explorer tree, click the plus sign (+) next to the folder of the route to which you want to add an account.
- 4 Click the plus sign (+) next to the Accounts folder displayed under the route.  
A list of all the accounts assigned to the route you selected appears.
- 5 In the Accounts list, create a new record, and complete the necessary fields.  
Some fields are described in [Step 3 on page 213](#).  
Repeat [Step 5](#) for each account you want to add to the route.

## Assigning Target Lists to Routes (End User)

On your local database, you can use account lists created with the Account Targeting feature. After creating and saving a target list, you can optimize the target list by merging (intersecting or combining) it with other target lists. When you have finished merging target lists, you can assign the results to a route. You can also add or delete accounts after assigning the list of accounts to a route.

**NOTE:** The Account Targeting module is designed for end users, such as retail sales representatives, who have local data access and are not continuously connected to a network. For more information, see [Chapter 14, "Account Targeting."](#)

This task is a step in ["Process of Creating and Using Routes" on page 211](#).

### *To merge a target list*

- 1 Navigate to the Routes screen > Routes List view.
- 2 Drill down on the Route Name field hyperlink for a selected route, and click the Target Accounts view tab.
- 3 Click the Target Accounts list to activate it.
- 4 In the toolbar, click the Apply Target List button (located on the extreme left of the toolbar) and apply an account target list.
- 5 (Optional) Select multiple target lists and click Union (to combine the lists) or Intersection (to intersect the lists).  
If you combine or intersect lists you can save the new list as a target list.
- 6 Repeat [Step 4](#) and [Step 5](#) until you have optimized your target list.  
You are now ready to assign the target list to a route.

### *To assign a target list to a route*

- 1 Navigate to the Routes screen > Routes List view.
- 2 Drill down on the Route Name field hyperlink for a selected route, and click the Target Accounts view tab.

- 3 In the Target Accounts list, select the accounts that you want to add to a route.
- 4 Click Commit.

The selected accounts are added to a route and appear in the Accounts list.

- 5 Fill in the fields for each account you added.

Some fields are described in the following table.

Field	Comment
Call Time	<p>Edit this field to reflect the time when the account is to be visited.</p> <p>For the first account you assign to a route, this field defaults to the value in the Working Hours Start At field on the User Profile Preferences screen &gt; Calendar view. Subsequent accounts you assign to the route accommodate existing accounts. For example, if a route has one account with a call time of 8:00 AM and a call duration of 30 minutes, the second account you assign to the route defaults to a call time of 8:30 AM.</p>
Call Duration	<p>Edit this field to reflect the scheduled duration of the account visit.</p> <p>For all accounts you assign to a route, this field defaults to the value in the Appointment Duration field on the User Profile Preferences screen &gt; Calendar view.</p>
Offset Day	<p>Allows you to create routes that span more than one day. It indicates the number of days after the beginning of the route that an account is visited. For example, if an account is to be visited on the first day of a route, this field is set to 0. If the account is to be visited on the second day of a route, this field is set to 1.</p>
Last Call	<p>Identifies the date and time of the most recent visit to this account.</p>

For information about target lists, see about global target list management in *Siebel Applications Administration Guide*.

## Using Routes to Schedule Visits (End User)

After you create a route, you can use it to schedule visits to all the accounts you added to the route.

This task is a step in [“Process of Creating and Using Routes” on page 211](#).

**To schedule visits from the My Routes view**

- 1 Navigate to the Routes screen > Routes List view.
- 2 Drill down on the Route Name field hyperlink for a selected route, and click the More Info view tab.
- 3 In the More Info form, click the Schedule button.  
The Schedule Visit dialog box appears.
- 4 In the Start Date field, enter a date, and then click OK.

In-store visit appointments for each account in the route are added to the calendar of the retail sales representative to whom the route is assigned. All activities that are relevant to the visit are automatically applied. Therefore, you do not need to associate activities to visits after they have been created.

**CAUTION:** It is possible to schedule multiple appointments for the same time period when using the Routes views to schedule visits. Such scheduling conflicts do not trigger any sort of automatic notification. Check the Daily Calendar view for possible conflicts after routes have been added to their schedules. If scheduling conflicts exist, adjust the starting times of appointments or delete them as necessary to resolve the conflicts.

## About Configuring Routes

This topic contains information that might be useful to configurators making changes to the Routes module.

The procedures documented in this chapter include buttons that invoke specialized methods, as described in [Table 25](#).

Table 25. Buttons And Methods For Routes Configurators

Button	Method	Description	Supported On
Commit	CommitAcct	Writes account names from temporary targeting tables to permanent tables where routes are stored.	Applet Layer
Schedule - Routes More Info view	ShowPopup	Brings up a dialog box for sales representative and start date.	Bus Comp Layer
	OK	Creates an activity for the sales person to visit all accounts specified as route accounts.	
Schedule - Target Accounts view	ShowPopup	Brings up a dialog box for sales representative and start date.	Bus Comp Layer
	OK	Creates an activity for the sales person to visit all accounts specified as route accounts.	







# 14 Account Targeting

Account Targeting allows end users to perform advanced queries on accounts and save the results as target lists. This chapter describes how administrators and retail sales representatives use the queries in Account Targeting to create target lists and merge them with other target lists. Topics include:

- [“About Account Targeting” on page 219](#)
- [“Scenarios for Account Targeting” on page 220](#)
- [“Process of Account Targeting” on page 222](#)
- [“Making a Predefined Query Public” on page 222](#)
- [“Deleting a Saved Predefined Query” on page 223](#)
- [“Creating a Target List \(End User\)” on page 223](#)
- [“Saving a Target List \(End User\)” on page 225](#)

## About Account Targeting

Account Targeting can be used only on a mobile user’s local database. It allows end users to perform advanced queries on accounts and save the results. The results of these queries are called *target lists*. Target lists consist of accounts that meet the conditions defined by a query and can be applied by end users when scheduling routes or viewing objectives. Typically, target lists are for a specific purpose and period of time in support of a promotion, a campaign, or an objective.

The views in the Target Accounts screen are designed for performing the kinds of advanced queries on accounts that retail sales representatives are most likely to need when creating target lists. For example:

- Accounts in New Jersey with sales greater than \$60,000 over the last half year
- Accounts that are located within a specific range of postal codes, and that were last audited over five weeks ago
- Accounts in California that are out of stock for a product
- Accounts that are visited weekly, have a distribution code of B, and last placed an order more than three weeks ago

Target lists can be applied individually or in combination with other target lists when you are scheduling routes, or designing objectives or promotions. For example, you can generate a target list of all California accounts that are out of stock of 20-ounce bottles of Apricot Splash. You can generate another account list containing all California accounts that have not been visited for the past 30 days. You can intersect the two lists and save the target list of all California accounts that have not been visited for the past 30 days and are out of stock of 20-ounce bottles of Apricot Splash. This target list can be applied to routes visited by retail sales representatives. For information about assigning target lists to routes, see [“Assigning Target Lists to Routes \(End User\)”](#) on page 214.

**NOTE:** Account Targeting queries must be executed in the same view in which they were created, so naming standards must include the name of the appropriate view.

The target list can be applied to a route, an objective, or a promotion. For information about applying target lists to:

- Routes, see [Chapter 13, “Routes.”](#)
- Objectives, see [Chapter 11, “Objectives”](#)
- Promotions, see [Chapter 8, “Trade Promotions”](#)

**NOTE:** The Account Targeting module is designed for end users, such as retail sales representatives, who have local data access and are not continuously connected to a network.

## Scenarios for Account Targeting

These scenarios are examples of processes performed by a system administrator, key account managers, retail managers, and sales representatives to create lists of target accounts. Your company might follow a different process according to its business needs. Topics include:

- [“Key Account Managers Creating Target Lists for Sales Representatives”](#) on page 220
- [“Creating Target Lists for Sales Representatives”](#) on page 221
- [“Process of Account Targeting”](#) on page 222

The first business scenario presented illustrates how key account managers can create target lists for use by retail sales representatives. The second business scenario illustrates how retail sales representatives can create and use their own target lists.

### Key Account Managers Creating Target Lists for Sales Representatives

A brand manager establishes a promotion to be run at all grocery stores. The key account manager for the corporate headquarters of a large chain of grocery stores is responsible for supporting this promotion. As part of the support for this promotion, the key account manager wants sales representatives to target specific accounts.

The key account manager begins by determining the key attributes that are necessary for a successful promotion. She determines that the intersection of accounts with a store condition of Out of Stock and accounts with an industry type of Grocery and an Order Quantity greater than 100 is the optimal set of accounts for the sales force to focus on. She creates two predefined queries. For the first predefined query, she generates a list of accounts with a store condition of Out of Stock and saves this list. She creates a second predefined query to generate a list of accounts with an industry type of Grocery and an Order Quantity greater than 100 and saves this list. She intersects the two lists and a target list of 41 accounts is returned.

The key account manager emails the system administrator to request that the two predefined queries she has created be made public. The system administrator unlocks the two predefined queries. This allows all Consumer Goods users to view and execute them. The system administrator emails the key account manager to let her know the predefined queries have been made public and are now available to anyone using the Consumer Goods application.

The key account manager sends an email to her retail managers and retail sales representatives directing them to intersect a list of accounts with a store condition of Out of Stock and a list of accounts with an industry type of Grocery and an Order Quantity greater than 100.

A retail sales representative is sitting at home Sunday evening planning for the next week. He receives the email message and decides to plan his route immediately. In his local database, he executes the two public predefined queries and saves the target list of returned accounts.

The retail sales representative now has three options. He can assign the target list to a route he created, save the target list for a later date, or select a different view and the target list is deleted. After assigning the target list to a route, he can add and delete accounts from the list. He can also select only the accounts he wants to add to the route. The retail sales representative decides to assign the target list to a route and adds accounts from the list.

Finally, before he shuts his computer down for the evening, he deletes all target lists that are more than two weeks old.

## Creating Target Lists for Sales Representatives

A retail sales representative is planning his visits for the next week. Each day, he visits between 40 and 50 different accounts, often spending only a few minutes at each account. Because he is responsible for such a large number of accounts, he needs to be able to track his visits and the activities he performed during those visits.

He determines that the optimal set of accounts for him to visit is the union of accounts that did not place an order last week and have not been audited in the last two weeks. He creates two queries. For the first query, he generates a list of accounts that did not place an order last week and saves this list. He creates a second query to generate a list of accounts that have not been audited in the last two weeks and saves this list. He combines the two lists and a target list of 48 accounts is returned. Because this is the list of accounts the retail sales representative wants to visit this week, he assigns the target list to his route for the upcoming week.

## Process of Account Targeting

This topic lists the tasks typically performed by administrators and end users when managing account targeting. Your company might follow a different process according to its business requirements.

### Administrator Procedures

The following list shows tasks administrators typically perform to manage account targeting:

- 1 [“Making a Predefined Query Public” on page 222](#)
- 2 [“Deleting a Saved Predefined Query” on page 223](#)

### End-User Procedures

The following list shows tasks end users typically perform to access and use account targeting:

- 1 [“Creating a Target List \(End User\)” on page 223](#)
- 2 [“Saving a Target List \(End User\)” on page 225](#)
- 3 [“Assigning Target Lists to Routes \(End User\)” on page 214](#). Merging Target Lists After creating and saving a target list, retail sales representatives can merge (intersect or combine) it with other target lists.

After merging target lists, retail sales representatives can assign the results to a route in the view that they use to plan their routes or objectives. After assigning the list of accounts to a route, they can add or delete accounts to optimize their target list.

## Making a Predefined Query Public

Predefined queries must be made public before they can be viewed and executed by end users.

This task is a step in [“Process of Account Targeting” on page 222](#).

### *To make a predefined query public*

- 1 Navigate to the Administration - Application screen > Predefined Queries view.
- 2 In the Predefined Queries list, click Query.
- 3 Click the Object field drop-down list, and select Account Targeting.
- 4 In the Predefined Queries list, click Go.

A list of all predefined queries containing Account Target is returned.

- 5 In the Predefined Queries list, select the record containing the predefined query you want to make public.

**NOTE:** Check that the name of the query includes the view in which it was created, so that other users can execute the query in the same view. The view name in which the query was created appears in the Query column, and the name of the query can be edited in the Name column.

- 6 In the Predefined Queries list, click the Private field and change the letter to a 'N'.

The predefined query is now public and can be executed by all users with access to the Account Targeting views.

**NOTE:** Other users must first exit and reenter the application before they can see the new public query.

## Deleting a Saved Predefined Query

You can delete saved queries that are no longer needed after a promotion or sales event has expired. This deletion allows users to view and execute only current predefined queries.

This task is a step in ["Process of Account Targeting" on page 222](#).

### *To delete a saved query*

- 1 Navigate to the Administration - Application screen > Predefined Queries view.
- 2 In the Predefined Queries list, click Query.
- 3 Click the Object drop-down list, and choose Account Targeting.
- 4 In the Predefined Queries list, click Go.

A list of all predefined queries containing Account Targeting is returned.

- 5 In the Predefined Queries list, click Delete.

The selected predefined query is deleted and can no longer be viewed or executed.

## Creating a Target List (End User)

The views in the Target Accounts screen allow end users to select profile information about which to query, such as visit frequency, last visit date, and order date. The results that they save consist of a set of accounts.

If end users are querying only on an account profile attribute, they can use the Account Information view. This view has been designed to return all accounts that meet the query condition, whether or not the accounts contain demographic or assessment information. Using a different view to query on account profile information returns accounts that meet the query conditions *and* the condition for which the view was designed. For example, querying from the Orders view returns only those accounts that contain orders and meet the query conditions. For information about performing queries, see *Siebel Fundamentals*.

**NOTE:** Account Targeting is used on your local database. End user's target lists are not synchronized with the Siebel Server. Therefore, if end users receive a new database extract, they must re-create their target lists. However, if an end user is a remote user, the normal process of synchronizing a local database with the Siebel Server does not affect the end user's target lists.

This task is a step in ["Process of Account Targeting" on page 222](#).

## Refining a Query

End users who want to perform queries on fields across multiple forms in a single targeting view need to use the refine query feature. For example, an end user who wants to perform a query for all California accounts with a distribution code of A must enter the first query criteria (all California accounts) in the Account Attribute Selection form and then refine the query in the Demographics and Assessment form to include only those accounts with a distribution code of A.

### *To refine a query*

- 1 Navigate to the Target Accounts screen > Account Targeting List view.
- 2 From the visibility filter, select the Targeting view on which you want to perform the query.
  - To perform a query on demographics and assessments, select Account Information.
  - To perform a query on orders, select Orders.
  - To perform a query on store conditions, select Store Conditions.
- 3 In the Account Attribute Selection form, click Menu, and then select New Query.
- 4 Enter the criteria in the fields for which you want to perform a query.
- 5 In the next form, click Menu, and then select Refine Query.
- 6 Enter the criteria in the fields for which you want to perform a query, click Menu, and then select Run Query.

In the Target Accounts list, accounts that satisfy both sets of query criteria appear. To save the target list, see ["To save a target list" on page 225](#).

### *To create a target list based on demographics and assessments*

- 1 Navigate to the Target Accounts screen.
- 2 From the visibility filter, select Account Information.
- 3 In the Demographics and Assessment form, click Menu, and then select New Query or select a predefined query from the Queries drop-down list.
- 4 Specify the query criterion or refine a predefined query, if necessary.
- 5 In the Demographics and Assessment list, click Menu, and then select Run Query.

The results of the query are returned. To save the target list, see ["Saving a Target List \(End User\)" on page 225](#).

**NOTE:** The more fields in which an end user enters query criteria, the longer it can take to execute the query. Also, if an end user enters a query condition that is too general (such as all accounts with a Weekly ACV greater than 1), it can take a significant amount of time to save the query later, due to the number of records meeting the query criteria.

### *To create a target list based on orders*

- 1 Navigate to the Target Accounts screen.



- 2 From the visibility filter, select Orders.
- 3 In the Order form, click Menu and select New Query, or select a predefined query from the Favorites drop-down list.
- 4 Specify the query criterion or refine a predefined query, if necessary.
- 5 In the Order form, click Menu, and then select Run Query.

The results of the query are returned. To save the target list, see [“Saving a Target List \(End User\)” on page 225](#).

### *To create a target list based on store conditions*

- 1 Navigate to the Target Accounts screen.
- 2 From the visibility filter, select Store Conditions.
- 3 In the Store Conditions form, click Menu, and select New Query or select a predefined query from the Queries drop-down list.
- 4 Specify the query criterion or refine a predefined query, if necessary.
- 5 In the Store Conditions form click Menu, and then select Run Query.

The results of the query are returned. To save the target list, see [“Saving a Target List \(End User\)” on page 225](#).

**NOTE:** When an end user queries on a product and a store condition, only the last audit date of the product is queried for the specified condition. When an end user queries only on a store condition, all products with the store condition are returned.

## Saving a Target List (End User)

When an end user has finished creating and refining a target list, the list can be saved and applied to a route. Before performing the following procedure, you must first create a target list. For information about applying a target list to a route, see [“Assigning Target Lists to Routes \(End User\)” on page 214](#).

This task is a step in [“Process of Account Targeting” on page 222](#).

### *To save a target list*

- 1 In the toolbar, click the Save Target List button.

**NOTE:** Do *not* use the keyboard shortcut CTRL+S, the Edit > Query > Save command (from the menu bar), or the Save Query As dialog box to save the query unless the end user wants to make a particularly complex query public or it is a query that is run frequently. For more information, see [“Making a Predefined Query Public” on page 222](#)

The Save to List dialog box appears with a blank List Name field.

- 2 In the List Name field, enter a unique name for the target list.

**CAUTION:** If the end user enters a name already in use, the previously saved target list is overwritten without warning.

- 3 Click Save.

The target list is saved. It can be applied to a route, an objective, or a promotion. For information about applying a target list to an objective, see [Chapter 11, "Objectives,"](#) and for information about applying a target list to a promotion, see [Chapter 8, "Trade Promotions."](#)

**NOTE:** The saved target list includes only those records that matched the query criteria *when the query was generated*. It is recommended that end users re-create their target lists periodically, because data might have been modified or new accounts might have been added since they created the target list.

# 15 Inventory and Order Management

This chapter describes the inventory and order management process in Oracle's Siebel Consumer Goods. Topics include:

- "About Inventory and Order Management" on page 227
- "Process of Managing Inventory and Orders" on page 229
- "Associating Assets with Inventory Locations (End User)" on page 229
- "Recording Van Information (End User)" on page 229
- "Verifying Van Inventory (End User)" on page 230
- "Reviewing Billings (End User)" on page 231
- "Taking Retail Orders (End User)" on page 232
- "Recording Deposits (End User)" on page 233

For more information about inventory and order management, see the following documents on the *Siebel Bookshelf*:

- *Siebel Pricing Administration Guide*
- *Siebel Product Administration Guide*
- *Siebel Order Management Guide*

## About Inventory and Order Management

Sales representatives, presales representatives, and delivery representatives are often responsible for capturing orders, invoicing, and collecting payments. In addition to these primary sales responsibilities, they might also collect payment for outstanding billings, exchange products with other delivery representatives, and deposit payments at the local bank. These activities are all part of the inventory and order management process.

The activities associated with inventory and order management are shown in [Figure 2 on page 228](#).

**NOTE:** This is an example of a Conduct Retail Visit subprocess business flow. A business process is a set of activities organized to achieve a business objective. A business process model depicts the flow of work typically followed by users or systems to complete a sequence of tasks. The Conduct Retail Visit subprocess business flow shows a greater level of detail for the high-level tasks represented in a business process diagram.

Figure 2 shows an example of a Conduct Retail Visit subprocess business flow.

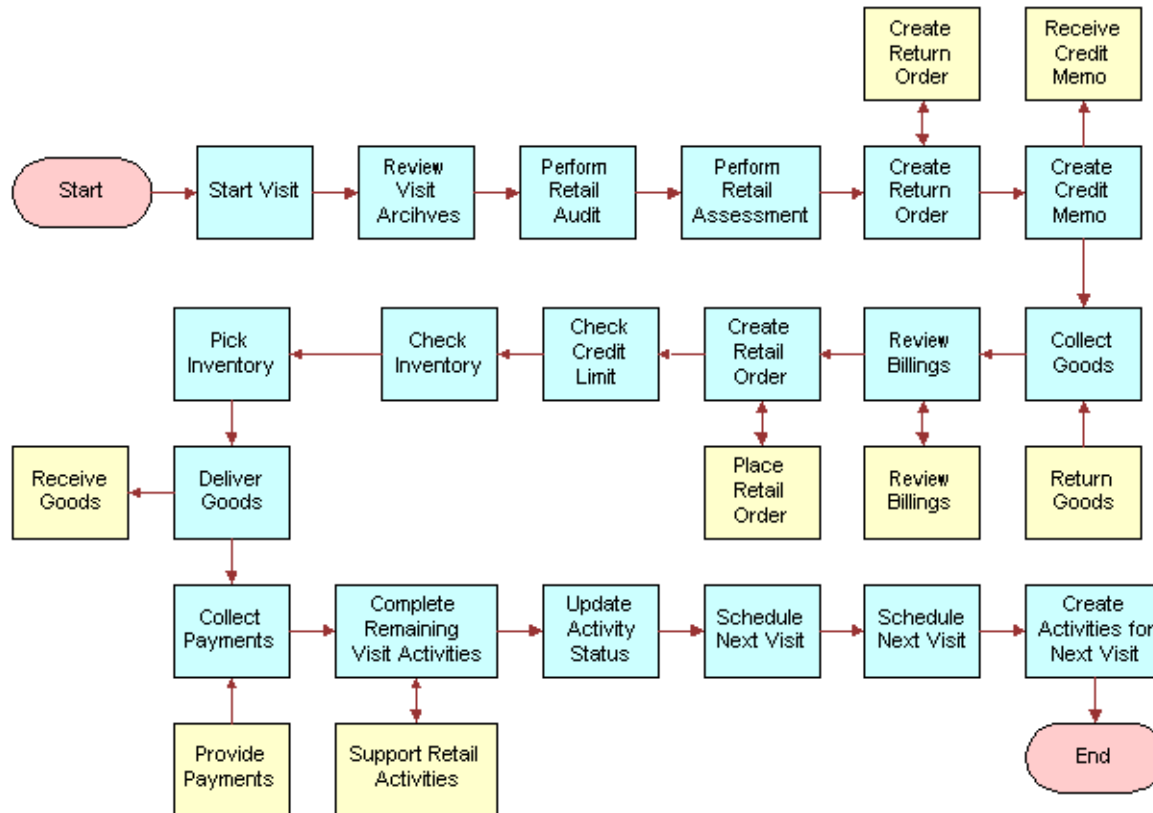


Figure 2. Sample Conduct Retail Visit Subprocess Business Flow

## Scenario for Managing Inventory and Orders

Ace Corporation East has just bought a new van to be used in the delivery of inventory to different outlets. A delivery sales representative at Ace Corporation East has been designated as the driver of the van. He decides to associate the new delivery van with Ace Corporation East's physical location. Before he goes on his first delivery in the van, he registers some information about the van, for example, the van's millage. Also, he makes sure that the van's inventory on the laptop matches the physical inventory in the van. He is now ready to make the deliveries.

The delivery sale representative then drives to the first retail outlet, and makes the initial delivery. Also, at this point, he checks for outstanding invoices, collects payment, and records the payments made. He also has a discussion with the stores manager at the outlet about any orders that the stores manager wants to place, and records these orders. He is now ready to make his next delivery.

Over the course of the day, the delivery sales representative might have made payment collections, and might decide to deposit these payments at a designated bank. If he does this, then he must record the deposits that he has made.

# Process of Managing Inventory and Orders

This topic lists the tasks typically performed by sales representatives when managing inventory and orders. Your company might follow a different process according to its business requirements. Carry these tasks out in the order in which they are listed.

- 1 [“Associating Assets with Inventory Locations \(End User\)” on page 229](#)
- 2 [“Recording Van Information \(End User\)” on page 229](#)
- 3 [“Verifying Van Inventory \(End User\)” on page 230](#)
- 4 [“Reviewing Billings \(End User\)” on page 231](#)
- 5 [“Taking Retail Orders \(End User\)” on page 232](#)
- 6 [“Recording Deposits \(End User\)” on page 233](#)

## Associating Assets with Inventory Locations (End User)

A van sales representative can associate assets with inventory locations.

This task is a step in [“Process of Managing Inventory and Orders” on page 229](#).

### *To associate assets to inventory locations*

- 1 Navigate to the Inventory Location Management screen.
- 2 In the Inventory Locations list, select the inventory location to which you want to associate assets, and then click the Asset field select button.
- 3 In the Pick Asset dialog box, choose the appropriate records, and click OK.

## Recording Van Information (End User)

Before leaving the depot, a van sales representative verifies the van identification information and records the van’s mileage.

This task is a step in [“Process of Managing Inventory and Orders” on page 229](#).

### *To record van information*

- 1 Navigate to the Inventory Location Management screen.
- 2 Drill down on the Name field hyperlink for a selected inventory location, and click the Readings view tab.
- 3 Verify that the Van Plate # and Serial # are correct.

- 4 Scroll down to the Asset list, create a new record, and complete the necessary fields. Some fields are described in the following table.

Field	Description
Reading	Enter the van's current mileage.
U/M	The unit of measure specified at the time of asset setup.
Time Taken	The time taken to deliver the asset.
Reading #	A unique ID number for each reading.
Created	Time when you created this record.
Complete	Select this check box to commit the record when you are satisfied that all changes are complete.

## Verifying Van Inventory (End User)

Before visiting outlets, a van sales representative needs to verify that the inventory on the laptop matches the physical inventory in the van. The inventory is verified by performing a cycle count.

This task is a step in ["Process of Managing Inventory and Orders"](#) on page 229.

### *To perform a cycle count*

- 1 Navigate to the Cycle Counting screen > Cycle Count List view.
- 2 Create a new Cycle Count record, and then drill down on the Status field hyperlink.
- 3 In the Cycle Count form, record the start time, and change the status to In Progress.
- 4 In the Products list, click List Products.

This populates the list of products for the cycle count.

**NOTE:** Clicking the List Products button displays all products in the current van inventory belonging to a particular sales representative. Various products also have the correct product status associated with them, for example Good or Defective.

- 5 Verify the count of the stock in your van and enter the amounts of each item in the Count column.

**NOTE:** You can also use the Count UOM1 and Count UOM2 fields to capture the count of the physical inventory. These fields represent two units of measure that are related by Case Pack, which is a value set up by the administrator. Updates to Count UOM1 and Count UOM2 also update Count when it is committed based on the Case Pack.

- 6 When you are finished entering the amounts for your inventory, click Count Complete.

This converts the Cycle Count records to read-only.

- 7 Click the Variance view tab to compare your count with the original inventory.

- 8 To update inventory with the current count, select those products with variances greater than or less than zero, and click Adjust.
- 9 When your cycle count is complete, record the end time, and change the status to Done.

## Reviewing Billings (End User)

A common activity at retail outlets is reviewing billings. The sales representative reviews all outstanding invoices, collects payment, and records the payments. The following procedure assumes there is a Review Billings activity assigned to the visit.

This task is a step in ["Process of Managing Inventory and Orders"](#) on page 229.

### *To review outstanding invoices, collect payments, and record payments*

- 1 Navigate to the Visit Execution screen.
- 2 From the Activities list, in the Activity Type field, drill down on the Review Billings hyperlink.  
The All Invoices view in the Accounts screen appears, displaying all outstanding invoices for the current account.
- 3 Select an invoice record, and drill down on the Invoice # field hyperlink.  
The Invoice Line Items view in the Invoices screen appears.
- 4 Click the Payments view tab, and in the Payments list, create a new payment record.
- 5 Click the select button in the Payment # field.  
This launches the Pick Payment dialog box in which all residual payments or credits that can be applied to the current invoice appear.  
To pay an invoice, the sales representative can either collect a new payment from the customer, or use existing credit to pay the invoice.
- 6 To collect a new payment from the customer, perform the following steps:
  - a In the Pick Payment dialog box, create a new record.
  - b Enter the payment amount in the Amount field.  
**NOTE:** The new amount cannot exceed the values in either the Total Due field on the invoice, or the Remaining Amount on the Payment record.
  - c Select a value from the Method drop-down list.
  - d Click Save, and then click OK.  
The payment record details appear in the Payments list.
- 7 To use an existing credit to pay off the invoice, do the following:
  - a Select a record for the current account in the Pick Payment dialog box.  
**NOTE:** This is an open credit memo or residual payment credited to the customer.
  - b Enter the amount to apply to the invoice in the Amount field.

- Click OK.

## Taking Retail Orders (End User)

At retail outlets, another frequent activity for sales representatives is taking retail orders.

This task is a step in [“Process of Managing Inventory and Orders” on page 229](#).

### *To take a retail order*

- 1 Navigate to the Sales Orders screen > List view.

- 2 Create a new sales order record.

- 3 Drill down on the Order # field hyperlink.

The Catalog view appears.

- 4 Click the Line Items view tab, and enter the order details.

The Start Price and List Tax fields are automatically populated based on the product listed. The Bonus Quantity, Extended Tax, and Price fields are calculated based on the quantity.

You can enter Order Qty for two units of measure. Use the fields Qty Ordered (UOM1) and Qty Ordered (UOM2) to capture the order quantity. For more information about Qty UOM1 and Qty UOM2, see [“Verifying Van Inventory \(End User\)” on page 230](#).

- 5 When the order is complete, in the Sales Order form, click Book.

The order status changes to Booked.

- 6 To generate an invoice, in the Sales Order form, click Invoice.

Clicking Invoice does the following:

- Checks each line item to see if there is sufficient on-hand stock to fulfill the order.
- If there is enough inventory, checks if the order total exceeds the Available Credit.
- Changes the status of the order to Billed.
- Removes all zero-quantity line items.
- Creates the invoice.
- Opens the Invoice Line Items view.

- 7 From the Invoice Line Items view, click Deliver.

Clicking Deliver does the following:

- Updates the inventory base on the order.
- Changes the status of the invoice to Delivered or Booked.
- Checks the invoice balance against the account’s available credit.

For information about collecting payment for the invoice, see [“Reviewing Billings \(End User\)” on page 231](#).



For more information, see the chapter about creating a quote or sales order in the *Siebel Order Management Guide*.

## Recording Deposits (End User)

As a van sales representative, you might have to deposit payments you have collected during the day. When you do so, you can record the information.

This task is a step in ["Process of Managing Inventory and Orders"](#) on page 229.

### *To record a deposit*

- 1 Navigate to the Payments screen > Deposit Payments view.
- 2 Create a new deposit record.
- 3 In the Deposits list, drill down on the Deposit Date field hyperlink.
- 4 From the Payments list, select all the payments that were included in the deposit.
- 5 In the Deposit form, click Deposit.



# Index

## A

- Account Allocation Level parameter** 99
- account buying groups**
  - assigning products 64
- account catalogs**
  - defined 62
  - product categories, assigning to an account 60
  - reviewed 63
- account checkbook**
  - requesting payments by 159
- account credit memos, reviewing** 178
- account deductions**
  - analyzing 184
  - viewing 176
- account distribution list**
  - key account, deleting product 58
  - key account's distribution list, modifying 62
  - products, defining for an account distribution list 57, 58, 59
  - subaccounts, creating and defining 57
  - unauthorized products, adding to 61
- account hierarchies**
  - account hierarchies, creating guidelines 37
  - account-subaccount relationship, creating 38
- account managers**
  - funds, deals, and payments, reviewing 158
  - funds, reviewing 158
  - transferring a fund amount 156
- account market segments**
  - about and product distribution 52
- account plans**
  - adding to account promotions 116
- account products**
  - account audit information, reviewing 206
  - associating with merchandising locations 65
- account profile attribute**
  - about using Account Information view to query on 223
- account promotions**
  - about 105
  - accounts, adding to 122
  - attachments, adding to 135
  - current plan, adding promotions to 116
  - note about relationship to corporate promotions 108
  - objectives, associating 135
  - retaining when deleting corporate promotions 140
  - reviewing 206
- Account Targeting**
  - about using and example 219
  - note about updating contents of saved target list 226
  - note, about importance of database synchronization 223
  - note, about saving query using keyboard shortcut 225
  - process example, administrator procedures 222
  - process example, end-user procedures 222
  - query, deleting saved predefined query 223
  - query, making a predefined query public 222
  - query, refining 224
  - saving a target list 225
  - scenario, creating target lists for sales representatives 221
  - scenario, key account managers creating target lists 220
  - target list, creating 223
  - target list, creating based on demographics and assessments 224
  - target list, creating based on order 224
  - target list, creating based on store conditions 225
- account team member**
  - removing yourself from 39
- Account type classification, about** 32
- account-category hierarchies**
  - account and category levels, resetting 92
  - account subcategory hierarchy, creating 78
  - account-category hierarchy, creating 78
  - account-category hierarchy, deleting 79
  - account-category hierarchy, modifying 79
  - note about using Aggregate action 79
  - setting up, about 77
- account-category relationships**
  - aggregation, performing 80
  - building, about and procedure 81
  - maximizing aggregation performance 80
  - parallel aggregation processing on multiple servers 82
- account-product data**

- manually entering 91
- account-product nodes**
  - locking 96
  - locking manually 97
- account-product trees**
  - account-product trees locks, resetting 93
  - locks, populating 84
  - locks, resetting 93
- accounts**
  - about 31
  - Account Allocation Level parameter 99
  - account hierarchies, about 32
  - account hierarchies, guidelines for creating 37
  - account team member, removing yourself from 39
  - account-subaccount relationship, creating 38
  - activities, associating with an account 40
    - adding or modifying, about 34
  - address, associating to an account 39
  - address, creating for 39
  - audit information, reviewing 206
  - categories, about assigning using the Account Category view 61
  - category and account level allocation 98
  - classification, standard classification
    - examples 32
  - contacts, associating to an account 41
    - creating 34
    - deleting 37
    - note, about associating with routes 213
  - objective, targeting list of accounts to 190
  - objective, targeting to 190
  - objectives, reviewing 199
  - profiling an account 38
  - promotions, creating for 136
  - routes, adding to 212
  - scenario 32
  - status, viewing 193
  - supply sources and products, associating 64
  - supply sources, associating 64
- Accounts Contact view tab**
  - using to associate contacts to an account 41
- accounts Gantt chart, viewing** 111
- accrual funds**
  - automatically creating accrual funds 149
  - manually creating accrual funds 149
- Acquire Categories action**
  - about running 77
- activities**
  - account's objectives, reviewing 199
  - accounts, associating with 40
  - objective status, checking 194
  - objective status, checking using charts 194
  - objectives, adding to 188
  - objectives, changing status associated with 193
  - retail visits, adding activities 205
  - visits, reviewing prior to visit 199
- activity plan**
  - deduction activity plan, creating 177
  - templates, creating 175
- adding**
  - account plans to account promotions 116
  - accounts 34
  - accounts to routes 212
  - available activity to retail activity 205
  - literature to deductions 172
  - products to a promotion 122
  - promoted categories to corporate promotions 108
  - unauthorized products to account's distribution list 61
- addresses**
  - account, associating an address to 39
  - account, creating for 39
- administrative setup tasks, table of** 23
- Aggregate action**
  - aggregation, performing 80
  - note and using 79
  - parallel aggregation processing on multiple servers 82
  - performance, improving 80
  - performing periodic aggregations, about 93
  - process described 80
- Aggregate button**
  - trade promotions, described and method 141
- Allocate button** 71
- Apply button** 66
  - ensuring proper functioning of 67
  - trade funds 165
- Apply Period button, using** 191
- assessments**
  - creating target list based on 224
- assets**
  - associating to inventory locations 229
- attachments**
  - account promotions, adding to 135
  - deduction attachments, creating 178
- audits**
  - account audit information, reviewing 206
  - merchandising audit, performing 202
  - retail audit, performing 204

**B****baseline basis quantity**

- copying baseline basis quantity to 89
- defined and generating 84
- new products, generating for 86
- precalculating an adjusted quantity 87

**Baseline button**

- trade promotions, described and method 141

**baseline data**

- Baseline data set 70
- promoted products, associating with 132
- promotion planning controls 133
- viewing data, viewing 94

**Baseline Dates user property**

- about and examples 143

**baseline planning**

- about 71

**billings**

- reviewing 231

**business solutions, table of** 14**buttons**

- objectives, described and method 194
- product distribution, described and method 66
- retail visits, described and method 208
- routes, described and method 216
- sales volume planning, described and method 71
- trade funds, described and method 165
- trade promotions, described and method 141

**buying groups**

- about and associating products with 53
- creating 63
- creating, process overview 63
- member accounts, associating with 64
- products, associating with 64
- supply sources and products, associating 64

**C****Calculate Source button** 71**categories**

- account, assigning to 60
- acquiring 76
- category and account level allocation 98
- products, associating with 75
- products, unadopting 77
- queries, executing 95

**Category Aggregation**

- configuring 100
- enabling 100
- using 102

**Category button** 66**category promotions**

- simulating 114

**category-product hierarchies**

- categories, acquiring 76
- categories, associating products with 75
- product, unadopting 77
- setting up 74

**CG Payment Process**

- CG Payment business service 162
- process of using 161
- workflow process, accessing 162
- workflow process, executing 161
- workflow process, exporting 161
- workflow process, importing 161
- workflow process, testing 161

**checkbook**

- requesting payments by 159

**child objectives, creating** 191**collect payments**

- reviewing 231

**Commit button**

- objective configurators 195
- routes configurators 216
- trade promotions, described and method 141

**competitor products**

- allowing for viewing 47

**Conduct Retail Visit subprocess**

- about 227

**configuration information**

- objectives, buttons and methods 194
- product distribution, buttons and methods 66
- Products button 143
- retail visits, buttons and methods 208
- routes, buttons and methods 216
- sales volume planning, buttons and methods 71
- Siebel EIM, configuring for funds 165
- trade funds, buttons and methods 165
- trade funds. setting user properties 164
- trade promotion configurators, buttons and methods 141
- trade promotions, user properties 142

**Consumer Goods**

- business solutions, table of 14

**consumer goods**

- screens, described 18

**Consumer Goods funds**

- CG Payment business service 162
- CG Payment Process workflow process, accessing 162
- CG Payment Process. exporting workflow

- process 161
    - CG Payment Process. importing workflow process 161
    - CG Payment Process. process of using 161
    - rolling up paid payments, process of 160
    - testing workflow process 161
    - workflow process, executing 161
  - consumption**
    - Consumption data set 70
    - data, viewing 94
  - contacts**
    - associating accounts to 41
  - corporate promotions**
    - about 105
    - accounts Gantt chart, viewing accounts 111
    - adding promoted categories 108
    - creating 107
    - Gantt chart, viewing in 110
    - Gantt charts, about 111
    - literature, attaching 109
    - note, about relationship to account promotions 108
    - plans Gantt chart, about 112
    - promoted categories, viewing 110, 111
    - promotions Gantt chart, viewing 111
    - retaining account promotions when deleting corporate promotions 140
    - target account lists, committing to a 136
    - viewing 110
    - viewing literature 111
  - creating**
    - deductions 171
    - new retail activity 205
  - Credit Memo Administration view**
    - using to edit or modify memos 173
  - credit memos**
    - account credit memos, reviewing 178
    - creating or modifying 173
  - cycle count, performing** 230
- D**
- database**
    - system administration using local database 23
  - dates, changing for an objective** 191
  - deals**
    - closing 154
    - created for funds, reviewing 153
    - promoted product, reviewing for 153
    - promotion, creating a deal for 121
    - promotion, reviewing for 151
    - reconciling against payments 154
  - deduction resolution**
    - process overview 168
  - deductions**
    - account credit memos, reviewing 178
    - account deductions, viewing 176
    - account's deductions, analyzing 184
    - activity plan templates, creating 175
    - creating or editing 171
    - credit memos, creating or modifying 173
    - deduction activities, creating 176
    - deduction activity plans, creating 177
    - deduction attachments, creating 178
    - deduction literature, reviewing 179
    - deduction notes, creating 178
    - deductions resolution workloads, analyzing 174
    - generating deductions, process overview 168
    - invoices, associating or modifying 177
    - literature, adding to deductions and examples 172
    - managing HQ deductions scenario 169
    - occurrence of deductions 167
    - payments, voiding and canceling 180
    - promotion deductions, managing business scenario 169
    - resolving deductions, about 179
    - resolving HQ deductions, about 181
    - resolving promotion deductions 180
    - reviewing, querying, sorting, and assigning 175
    - splitting deductions, example and procedure 173
    - types of 168
    - workflow example, administrator procedures 170
    - workflow example, end-user procedures 170
  - Delete button** 66
  - deleting**
    - account-category hierarchy 79
    - accounts 37
    - products 77
    - saved query 223
  - demographics**
    - creating target list based on 224
  - deposits, recording** 233
  - direct distribution, about** 57
  - distribution codes**
    - classification type, about 32
    - setting up 56
  - distribution lists**
    - about and distribution methods 52
    - account's distribution list products, viewing 61
    - product distribution, example 53

unauthorized products, defined 56

### drop-down list

features that use periods 25

## E

**Execute Action button** 72

**Execute button** 71

## F

**features, new** 11

### fixed funds

automatically creating fixed funds 147

defined 145

manually creating fixed funds 147

**fund payments, reviewing** 153

### funds

account checkbook, requesting payments by 159

accrual funds, creating automatically 149

accrual funds, creating manually 149

adjustments, creating for a fund 151

CG Payment business service 162

CG Payment Process workflow process, accessing 162

CG Payment Process, exporting workflow process 161

CG Payment Process, importing workflow process 161

CG Payment Process, process of using 161

deals, reviewing created for a fund 153

defined 145

fixed funds, creating automatically 147

fixed funds, creating manually 147

fund amount, transferring 156

fund payments, reviewing 153

fund transfer, approving 156

grandchild fund, adding to 150

methods, invoked in trade funds 165

parent fund, adding child fund 150

payments, submitting 157

plan, about allocating to 118

reviewing funds 158

rolling up paid payments, process of 160

Siebel EIM, configuring for funds 165

testing workflow process 161

user properties, setting for funds 164

workflow process, executing 161

## G

### Gantt charts

about 111

accounts Gantt chart, viewing 111

corporate promotions, viewing 110

plans Gantt chart, viewing 112

promotions Gantt chart, viewing 111

**Generate button** 165

**grandchild fund, adding to fund** 150

## H

### hierarchies

See account-category hierarchies

### HQ deductions

about 168

resolving 181

## I

**incremental data set** 70

**indirect distribution, about** 57

### Intersection button

trade promotions, described and method 141

### inventory and order management

about 227

billings, reviewing 231

deposits, recording 233

inventory locations, associating assets to 229

retail orders, taking 232

van information, recording 229

van inventory, verifying 230

### invoices

associating or modifying 177

note, about creating invoices 178

note, about viewing all invoices 178

outstanding, reviewing 231

## L

### lift factors

about 112

copying a lift factor 115

promotion simulation, viewing lift factors available for 115

**List Products button** 208

### literature

corporate promotion, viewing 111

corporate promotions, attaching to 109

deduction literature, reviewing 179

deductions, adding to and examples 172

### local database

system administration using local database 23

### locations

associating merchandising locations with account products 65

**Lock button** 72

**locking account-product node**

resetting 93

**locking account-product nodes** 96

locking, about 96

manually 97

## M

**Market segment classification type**

about 32

**market segmentation, definition** 51

**marketing administrators**

approving a fund transfer 156

**mass change**

configuring 100

enabling 100

making extra fields available 103

**Mass Change button**

note, about using to change multiple periods 97

sales volume planning 72

**member accounts**

buying groups, associating with 64

**merchandising audit, performing** 202

**merchandising locations**

associating with account products 65

**modules and options, about** 17

**My Routes view**

using to schedule visits 215

## N

**new features** 11

**notes, creating deduction notes** 178

## O

**objective data set** 70

**objectives**

account promotions, associating 135

account, targeting to an objective 190

activities, changing status associated with 193

applying 192

child objectives, creating 191

configuration information 194

dates for an objective, changing 191

objective, creating 187

overview 185

recommended activities, adding 188

reviewing 192

scenario 186

status, checking 194

status, checking using charts 194

store visits, scheduling 192

targeting list of accounts to 190

trade promotions, role in 185

workflow example, administrator

procedures 186

workflow example, administrator setup

procedures 186

workflow example, end-user procedures 187

workflow example, maintenance

procedures 187

**OK button** 66

**order management**

See inventory and order management

**orders**

target list, creating based on 224

**outstanding invoices**

reviewing 231

## P

**parallel aggregation processing**

on multiple servers 82

**parent fund**

adding child fund to parent fund 150

**parent-child relationship, creating** 38

**payments**

caution, about using Siebel EIM to update 164

deal, reconciling to the associated payments 154

fund, submitting against 157

record and collect payments, reviewing 231

voiding and canceling 180

**percentage basis calculation**

in sales volume planning 99

**Period field**

features that use periods 25

**Period Type List of Values**

creating values for 26

**periods**

caution, about conflicting start dates 26

features that use periods 25

Period Type List of Values, creating values for 26

periods, creating 26

**period-type aggregation, about** 80

**personalization attributes, setting up**

Account Channel field, about 60

Account Channel field, predefined values 60

Product Differentiator field, about 60

**Phase button**

promoted categories, described and method 141

promoted products, described and method 141

**phasing**

enabling for promotions 119



- finalizing the result 137
- promoted categories 123
- promoted products 130

### plans

- approval, obtaining for 118
- creating a plan 116
- new promotion, adding to 116
- note about changing plan status 119
- revising plan 119
- submitting plan 119

### plans Gantt chart, viewing 112

### product baseline lists

- executing queries 95

### product distribution

- account catalogs, assigning product categories to 60
- account distribution list, creating and define subaccounts 57
- account market segments, about 52
- buying groups, about and associating products with 53
- controlling, about 51
- distribution codes, setting up 56
- distribution list, defining products for 57, 58, 59
- distribution list, example 53
- distribution lists, about and distribution methods 52
- personalization attributes, setting up 60
- workflow example, administrator procedures 54
- workflow example, end-user procedures 54

### Product Explorer, using 49

### product modules and options, about products 17

- account products, reviewing 206
- assigning to buying groups 64
- competitor products, viewing 47
- defining products, overview 46
- key account distribution list, deleting 58
- product catalog, about and sample catalog-category hierarchy 43
- Product Explorer, using 49
- product lines, creating 48
- product record, creating 46
- sales representative, exchanging products between 203
- Sales Volume Planning module, and the account-subcategory hierarchy 44
- scenario 44
- supply sources and products, associating 64
- unauthorized product, defined 56
- workflow example, administrator procedures 45

- workflow example, end-user procedures 46

### Products button

- about 143
- trade funds 165
- trade promotions, described and method 141

### promoted categories

- phasing 123
- recalculating phasing result for 124
- viewing of corporate promotion 110, 111

### promoted products

- adding 122
- baseline and shipment data, associating with 132
- deals, reviewing for 153
- phasing 130
- promotion planning controls 133
- recalculating phasing result for 131

### promotion deductions, resolving 180

### promotion planning controls 133

### promotions

- account promotions, reviewing 206
- account, creating for 136
- category promotion, simulating 114
- corporate promotions, adding promoted categories 108
- corporate promotions, attaching literature 109
- corporate promotions, creating 107
- corporate promotions, viewing 110
- corporate promotions, viewing in Gantt chart 110
- corporate promotions, viewing literature 111
- corporate promotions, viewing promoted categories 110, 111
- deals, creating a deal for 121
- deals, reviewing for a promotion 151
- enabling phasing for 119
- finalizing 137
- lift factors, copying 115
- lift factors, viewing available for promotion simulation 115
- promoted product and categories, about simulating promotions for 112
- promoted products, simulating outside a promotion 113
- trade promotion scenario 106
- types of 105

### promotions Gantt chart, viewing 111

## Q

### querying

- categories and baseline lists, executing in 95

- deleting saved predefined query 223
- note, about product and store condition versus store condition only 225
- predefined query, making public 222
- quota data set** 70

## R

### Recalculate button

- promoted categories, described and method 141
- promoted products, described and method 142

### recalculating phasing result for

- promoted categories 124
- promoted products 131

### record payments

- reviewing 231

### Refresh button

- sales volume planning 72
- trade funds 165

### Release Commitments 165

### resetting

- account and category levels 92
- account-product tree locks 93

### resolving deductions

- about 179
- HQ deductions 181
- promotion deductions 180

### retail activities

- merchandising audit, performing 202
- performing, about 201

### retail assessments, performing 203

### retail audits

- about performing 204

### retail orders, taking 232

### retail visits

- account audit information, reviewing 206
- account products, reviewing 206
- account promotions, reviewing 206
- account's objectives, reviewing 199
- activities, adding 205
- activities, reviewing prior to visit 199
- assessments, performing 203
- beginning retail visit 201
- configuration information, buttons and methods 208
- ending a retail visit 207
- merchandising audit, performing 202
- planning 199
- retail activities, about performing 201
- retail audit, performing 204
- retail visits, about 197
- sales representative, exchanging products

- between 203
- scenario 198
- store conditions, reviewing 204
- workflow example, end-user procedures 198

### Revise button 142

### Route Explorer view

- using to add accounts to a route 213

### routes

- accounts, adding to routes 212
- accounts, adding to using the Route Explorer view 213
- configuration information, buttons that invoke methods 216
- creating routes 212
- guidelines for creating routes 211
- note, about associating accounts with a route 213
- note, about limited duration routes 211
- process flow example, end-user procedures 211
- scenario, creating routes for retail sales representatives 210
- scenario, creating routes that change frequently 211
- scenario, retail managers creating routes for sales representatives 210
- target lists, assigning to 214
- using, about 209
- visits, scheduling from the My Routes view 215

### Routes Accounts view

- using to add account to a route 212

## S

### sales managers

- approving a fund transfer 156

### sales representatives

- exchanging products between 203

### sales volume planning

- account-category hierarchies, about setting up 77
- account-product nodes, locking manually 97
- account-product trees locks, populating 84
- account-product trees, building 81
- baseline basis quantity, copying baseline basis quantity to 89
- baseline basis quantity, defined and generating 84
- baseline basis quantity, generating for new products 86
- baseline basis quantity, precalculating an adjusted 87
- category and account level allocation 98

- category and product baseline lists, executing queries 95
  - category-product hierarchies, setting up 74
  - configuration, buttons and methods 71
  - data, about viewing 94
  - data, viewing 94
  - five data sets, about using for forecasting 69
  - locking account-product nodes 96
  - locking nodes 96
  - manually entering 91
  - percentage basis calculation 99
  - period-type aggregation 80
  - quantity, used in context 70
  - sales volume planning business service, accessing 100
  - sales volume planning data, manually entering 91
  - sales volume planning source data, adjusting 95
  - scenario 72
  - Sales Volume Planning module**
    - account-subcategory hierarchy, about using with 44
    - baseline and target planning process 71
    - workflow policies, process overview 27
  - saving**
    - note, about using keyboard shortcut or Save Query As dialog 225
    - target list 225
  - Schedule - Routes More Info view button** 216
  - Schedule - Target Accounts view button**
    - routes configurators 216
  - screens, described** 18
  - servers**
    - parallel aggregation processing on multiple servers 82
  - setup tasks**
    - administrative tasks, table of 23
    - implementation of modules or options, process of 25
    - Period Type List of Values, creating values for 26
    - periods, creating 25
    - Siebel workflow policies, setting up 27
    - Siebel workflow process overview 27
  - shared notes, about** 178
  - shipment data**
    - button, described and method 142
    - promoted products, associating with 132
    - promotion planning controls 133
  - shipment data set** 70
  - shipments**
    - data, viewing 94
  - Siebel Applications Administration Guide**
    - about using for set up tasks 23
  - Siebel Business Applications modules**
    - about 17
  - Siebel Enterprise Integration Manager**
    - caution, updating status of the Payment record 164
    - funds, configuring for 165
  - Simulate button**
    - promoted products, described and method 142
    - trade promotions, described and method 142
  - Skip All button** 72
  - source data**
    - excluding or skipping 95
  - splitting deductions**
    - example and procedure 173
  - Spread button**
    - trade promotions, described and method 142
  - store conditions**
    - note, about querying product versus store condition 225
    - reviewing 204
    - target list, creating based on 225
  - store visits, scheduling** 192
  - subcategories**
    - about SVP adoptees for the parent 75
  - supply sources**
    - associating with a product 64
  - SVP Adopt button** 72
  - SVP Adoptee field**
    - about populating automatically 76
  - system administration**
    - using your local database 23
- T**
- target**
    - data set 70
    - data, viewing 94
  - target account lists**
    - committing to corporate promotion 136
  - target lists**
    - Account Targeting, creating for 223
    - demographics and assessments, creating based on 224
    - note about updating contents of saved target list 226
    - note, about saving query using keyboard shortcut 225
    - note, about synchronizing with Siebel Server 223

- orders, creating Account Targeting based on 224
- query, refining for Account Targeting 224
- routes, assigning to 214
- saving a target list 225
- store conditions, creating Account Targeting based on 225

### **target planning process**

- about 71

### **templates**

- creating activity plan templates 175

### **trade funds**

- account checkbook, requesting payments by 159
- accrual funds, creating automatically 149
- accrual funds, creating manually 149
- adjustments, creating for a fund 151
- fixed funds, creating automatically 147
- fixed funds, creating manually 147
- fund amount, transferring 156
- fund payments, reviewing 153
- fund transfer, approving 156
- fund, defined 145
- funds, adding a grandchild fund 150
- funds, reviewing 158
- methods, invoked in trade funds 165
- parent and child funds 147
- parent fund, adding child fund to 150
- scenario 146
- Siebel EIM, configuring for funds 165
- user properties, setting for funds 164

### **trade promotions**

- note, about relationship between corporate and account promotions 108
- objectives, role of 185
- plans, creating 116
- promoted products, about promotion simulation 113
- promotions, about simulating for products and categories 112
- scenario 106
- types of 105

### **Trade Promotions deductions**

- about 168

### **trade promotions, configuring**

- buttons and methods, invoking 141
- Products button 143
- retaining account promotions when deleting corporate promotions 140
- user properties 142

### **transferring funds**

- approving fund transfer 156
- fund amount, transferring 156

## **U**

### **unadopting a product 77**

### **unauthorized products**

- account's distribution list, adding to 61
- defined 56

### **Union button**

- trade promotions, described and method 142

### **Unlock button 72**

### **Update button**

- for retail execution 208

### **user properties**

- funds, setting 164
- trade promotions 142

## **V**

### **van information, recording 229**

### **van inventory, verifying 230**

### **visits**

- account's objectives, reviewing 199
- activities, reviewing prior to visit 199
- retail visit, beginning 201
- scheduling visits using the My Routes view 215

## **W**

### **workflow policies**

- Consumer Goods modules that user workflow policies 27
- Sales Volume Planning module, set up process overview 27

### **workloads**

- analyzing deductions workloads 174