



Documentation Update for *Siebel Call Center User Guide*

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This Documentation Update applies to the following versions of *Siebel Call Center User Guide*.

Document Version: 7.0

Date Published: September 2001

Software Versions:

Siebel 7 [Version 7.0.4](#)

Siebel 7 [Versions 7.0.2, 7.0.3, and 7.0.4](#)

Version 7.0.4

General Information

March 8, 2002

HTML Formatting and User Preferences for Email

Version 7.0.4 of Siebel Call Center adds support for HTML formatting in email messages that are viewed or composed through the Call Center application.

For incoming email messages that include HTML formatting, the Web browser that is used to run Call Center automatically determines how the HTML formatting will be displayed. For example, if you use a browser that supports the `<BOLD>` tag, Call Center displays bold text for all email text located between the `<BOLD>` tag and the `</BOLD>` tag.

For outgoing email that is sent using either Send Email (F9) or eMail Response functionality, a user preference determines whether the message will be sent in plain text or using HTML formatting. If the appropriate preference is set for HTML formatting, special editing controls are available in the form where you compose your email message. These controls allow you to use supported HTML formatting, and also provide some standard editing features such as cut and paste.

The following procedure describes how to set user preferences for outbound email, including how to enable HTML formatting. A later procedure describes how to use the related editing controls.

To set outbound email user preferences

- 1** From the application-level menu, choose View > Site Map > User Preferences > Outbound Communications.

The Outbound Communications form appears.

2 Complete the fields in the form; some fields are described in the following table.

Field	Comments
Default Closing Template	Specifies a communications template (for the email channel) to use as a closing for an email reply sent using Siebel eMail Response. The template content is inserted automatically into the message. It is placed after the last text you enter, but before the thread ID and the original message, if the original message is included.
Default Greeting Template	Specifies a communications template (for the email channel) to use as a greeting for an email reply sent using Siebel eMail Response. The template content is inserted automatically at the beginning of the message.
Default Profile	<p>Specifies the default communications profile for a user to use for the Send Email and Send Fax commands.</p> <p>The profile stores various communications settings and provides access to the communications driver that transfers information between the Siebel software and the email/fax server. For example, a profile for the Internet SMTP/POP3 Server driver handles outbound communications using the SMTP protocol.</p> <p>You have access to any profiles that are associated with your Siebel responsibility setting, and to any profiles that you create for your personal use by using the My Profiles view in the Communications screen. The ability to create personal communications profiles is not available for some responsibility settings.</p> <p>The default profile information is copied to the From field in the Send Email and Send Fax windows. You can specify a different profile by choosing another value from the drop-down list for the From field.</p>
Default Recipient Class	<p>In some contexts, the Send Email and Send Fax commands let you choose email or fax recipients from data stored in certain fields of the current record. If you choose a recipient based on one of these current field values, the Default Recipient Class setting specifies the default choice for where recipient email or fax address information will be populated in the outgoing message. Choices are To, Cc, and Bcc.</p> <p>For example, you might generally want to populate recipients to the To field. However, depending on your typical activities or workflow and on your company's business needs, it may be more appropriate to populate recipients to the Cc or Bcc field instead of the To field.</p>
eMail Response Default Message Format	Specifies the type of formatting to use for outbound email messages that are replies to inbound eMail Response messages. Available values are HTML and Plain Text.
Include Original Message in Reply	When selected, automatically includes the current eMail Response message in the body of any reply to that message. Includes source, destination and subject information from the header of the eMail Response message.

Field	Comments
Remain on Same View After Send (Cancel)	<p>When selected, continues to display the Incoming Message form, Incoming Attachments form, and Outgoing Message form after a reply to an eMail Response message is sent, but populates the forms with data from the next record in the current Communications list.</p> <p>When not selected, redisplay the Communications list after a reply to an eMail Response message is sent.</p>
Send Email Default Message Format	Specifies the type of formatting to use for outbound email messages that are sent using the Send Email command. Available values are HTML and Plain Text.
Upon Sending Messages Generate	<p>Specifies activity generation for messages sent using the Send Email, Send Fax, Send Wireless Message, and Send Page commands. Options are:</p> <ul style="list-style-type: none"> ■ Public activities. Sets the Internal flag to FALSE for activity records generated by sending outbound messages. ■ Private activities. Sets the Internal flag to TRUE for activity records generated by sending outbound messages. <p>The specific results of the Internal flag being set to FALSE or TRUE depend on your Siebel implementation. Consult your Siebel Administrator for more information.</p>

3 Click Save.

The following procedure describes how to use the special editing controls that are available for eMail Response replies or Send Email messages when the corresponding Default Message Format preference is set to HTML.

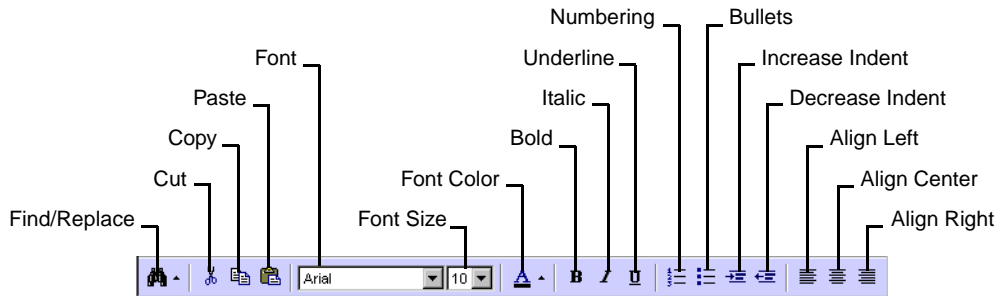
To use special editing controls for outbound email with HTML formatting

- 1 Set the appropriate outbound user preference to use HTML formatting, as described in [“To set outbound email user preferences” on page 1-2](#).
- 2 Use one of the following methods to start composing an outbound email message:
 - To compose an eMail Response reply, choose View > Site Map > Communications > My Communications from the application-level menus, select the email message to which you want to respond, and click Reply.
 - To compose a Send Email message, press the F9 key or choose File > Send > Email from the application-level menus.
- 3 In the Outgoing Message form or Send Email form that appears, click the unlabelled field below the Body field.

The special editing controls appear at the bottom of the field.

4 Compose your message using the special editing controls as needed.

The editing controls are shown in the following graphic, and are described in the table that follows this procedure.



5 Complete the remaining fields in the form, and then click Send.

Editing Control	Usage
Align Center	Click to center each line of selected paragraphs.
Align Left	Click to left-align selected paragraphs.
Align Right	Click to right-align selected paragraphs.
Bold	Click to apply bold formatting to selected text, or to remove bold.
Bullets	<p>Click to apply bulleting to selected text, or to remove bullets. Creates a list of bulleted paragraphs, corresponding to an HTML unordered list. Bullets appear differently at different levels of indenting.</p> <p>Note that items that are at the same indentation level within a list must have the same list type, either all items bulleted or all items numbered. List items that are at different indentation levels can have different list types. This means you can nest an indented list of one type (such as a bulleted list) within a list of another type (such as a numbered list).</p>
Copy	Click to copy selected text to the clipboard.
Cut	Click to cut selected text to the clipboard.
Decrease Indent	Click to decrease the indenting for selected paragraphs.
Find/Replace	<p>Click the arrow to display the Find controls above the editing bar, or to hide these controls. Click the arrow on the left side of this area to toggle between Find controls and Find and Replace controls.</p> <p>To find specified text, enter the text to find, then click Go.</p> <p>To replace specified text, enter the text to replace and the replacement text. If you want to replace all instances of the specified text, select the Replace All check box. Then click Go.</p>
Font	Choose a font from a drop-down menu to apply to selected text. Available fonts include Arial (the default), Verdana, Times New Roman, and Courier.
Font Color	Click the arrow to display font colors above the editing bar, then click to choose a color to apply to selected text.
Font Size	Choose a size from a drop-down menu to apply to selected text. Point sizes include 8 (the default), 10, 12, 14, 18, 24, 36.
Increase Indent	Click to increase the indenting for selected paragraphs.
Italic	Click to apply italic formatting to selected text, or to remove italics.

Editing Control

Usage

Numbering	<p>Click to apply numbering to selected text, or to remove numbering. Creates a list of numbered paragraphs, corresponding to an HTML ordered list.</p> <p>Note that items that are at the same indentation level within a list must have the same list type, either all items bulleted or all items numbered. List items that are at different indentation levels can have different list types. This means you can nest an indented list of one type (such as a bulleted list) within a list of another type (such as a numbered list).</p>
Paste	<p>Click to paste text from the clipboard into the message area. Depending on the source, text you paste may include HTML formatting.</p>
Underline	<p>Click to apply underlining to selected text, or to remove underlining.</p>

Versions 7.0.2, 7.0.3, and 7.0.4

Chapter 1, Overview

March 27, 2001

Home Page Overview

When agents log into the Siebel application, the first screen they see is determined by the value of the Startup Screen user preference. If this preference has not been set, the agents see the home page. The home page is a combination of lists and forms that provide a snapshot of the most important information agents need to manage their day. This information may include the My Campaigns list of all active campaigns based on the defined Start and End Dates of the campaigns.

Chapter 5, Service Requests

July 15, 2003

The following revised information clarifies ambiguous wording in the Note.

Identifying the Customer

When a customer telephones a call center or service center, the agent must determine if the caller is an existing or new customer. To verify a customer, go to the Contacts or Accounts screen and perform a query on the information about the customer. This query may also be performed through the Search Center.

If the customer exists in the system, the agent can review the requests that have already been entered for this customer. If the customer does not already exist in the system, the agent can add the customer.

NOTE: For companies using the Siebel Communications Server, this customer search can take place automatically when the call is received, presenting the agent with relevant contact information through an automated screen pop.

Chapter 10, eMail Response

March 27, 2002

Setting Spell Check Preferences

The procedure describing how to change default spell check options should contain the following additional information:

When the Ignore HTML Tags preference check box is selected, spelling is not checked for any text enclosed in angle brackets (< >) or any text that follows an unmatched left angle bracket (<).

The Always Check Spelling Before Sending check box applies to eMail Response reply messages. It does not apply to Send Email messages.

Replying to an Incoming Email

The following additional information applies to any situation where you are preparing to reply to an inbound eMail Response message:

When you view information in the Communications list of the All Communications view or the My Communications view, you can display additional information about the selected record by clicking a hyperlink in any of the following fields:

- Last Name field (displays Contact information)
- SR # field (displays Service Request information)
- Opportunity field (displays Opportunity information)

Adding Attachments and Literature

The following information about adding attachments and literature applies to outgoing email messages that are sent using either Send Email (F9) or eMail Response functionality:

The procedure that describes how to add an attachment refers to an Attachment button. This control appears as a paper clip icon to the right of the Attachments field.

You can add more than one attachment to an outgoing email message. All currently attached files are listed in the dialog box that appears when you click the paper clip icon. However, only the most recently attached file is listed in the Attachments field.

It is also possible to attach a Web page URL to an outgoing email message. When you do this, the email recipient sees the URL in the body of the email message. Depending on the software the recipient uses to read email, the URL may or may not be an active hyperlink to the designated Web page. The Web page itself is not attached. The following procedure describes how to add a URL to an outgoing email message.

To add a URL to an outgoing email message

- 1** Use one of the following methods to start composing an outbound email message:
 - To compose an eMail Response reply, choose View > Site Map > Communications > My Communications from the application-level menus, select the email message to which you want to respond, and click Reply.
 - To compose a Send Email message, press the F9 key or choose File > Send > Email from the application-level menus.
- 2** Compose your email message as usual.
- 3** Click the paper clip icon that appears to the right of the Attachments field.
The Attachments dialog box appears.
- 4** Click New.
- 5** In the File Name field, click the select button to display the Add Attachment dialog box.
- 6** In the URL field, enter the URL you want to include in your email message, and then click Add to return to the Attachments dialog box.
- 7** Click Save, and then click Close.

The URL appears in the Attachments field. The email recipient will see the URL at the end of the body of your email message, after your text and any thread ID or original message that you include. If the applicable Default Message Format user preference is set to Plain Text, “http://” will be added automatically to the beginning of any URL that does not already include it.

Chapter 11, Campaigns and SmartScripts

December 4, 2001

SmartScript Campaigns

Step 3 in the procedure detailing how to launch a campaign should contain information on which campaigns are visible in the My Campaigns list.

To launch a campaign

- 1** Navigate to the Campaigns screen.
- 2** From the Show drop-down list, select My Campaigns.
- 3** In the Campaigns list, click the Name hyperlink of the campaign you would like to launch.

The Campaigns list displays all active campaigns based on the Start and End Dates of the campaigns.