SIEBEL® eBUSINESS APPLICATIONS

SIEBEL ASSISTANT ADMINISTRATION GUIDE

SIEBEL 2000

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Siebel Systems, Inc., 1855 South Grant St., San Mateo, CA 94402

Contents

Introduction

Who Should Use This Guide

This guide describes how to implement the Siebel Assistant feature—including the Sales Assistant and the Service Assistant—in your Siebel application. Specifically, it discusses the Siebel Assistant Administration screen and its views.

The audience for this guide consists of:

Sales Representatives	End users of the Siebel application.
Mobile Representatives	End users of the Siebel application who are not on the network.
Marketing Administrators	Persons responsible for setting up and maintaining a marketing department; duties include designing and managing campaigns, product marketing information, and product distribution lists.
Call Center Administrators	Persons responsible for setting up and maintaining a call center; duties include designing and managing Computer Telephony Integration, SmartScripts, and message broadcasts.
Siebel Application Administrators	Persons responsible for planning, setting up, and maintaining Siebel applications.
Siebel Application Developers	Persons who plan, implement, and configure Siebel applications, possibly adding new functionality. A developer is typically someone from the Information Services department.
Installers	Persons responsible for setting up Siebel systems for initial use. An installer is typically a system administrator, a database administrator, or someone from the Information Services department.
Configurators	Persons responsible for planning, implementing, and configuring Siebel applications. A configurator is typically a consultant or someone from the Information Systems department.

It will be helpful to understand the flow of a sales person or service person’s tasks before reading this guide.

How This Guide Is Organized

This guide provides information necessary to implement, configure, and monitor the Siebel Assistant feature in Siebel applications, with particular detail provided for both application and client/server administration.

NOTE: Your Siebel implementation may not have all the features described in this guide, depending on which software modules you have purchased.

Additional Documentation

The following documentation also provides information on the topics addressed in this guide.

Siebel Basics

Siebel Release Notes and *Siebel System Requirements and Supported Platforms*

Siebel Applications Administration Guide

Siebel Marketing Administration Guide

Siebel Field Service Guide

This guide does not provide information about general software concepts, such as records and queries, or about using Windows. Neither does it provide instructions for basic navigation of Siebel applications. For this kind of information about Siebel applications, refer to *Siebel Basics*.

Administrators and developers, such as marketing administrators, call center administrators, and application developers, should also read the *Siebel Applications Administration Guide* for information on how to set up and maintain Siebel applications features.

For information on setting up products, as well as other tasks in the Marketing Administration screen, see the *Siebel Marketing Administration Guide*.

For details on using the Service Assistant with your field service application, see the *Siebel Field Service Guide*.

You will find information about Siebel Technical and Professional Services in the *Guide to Siebel Global Services*.

For copies of these documents, please use Siebel Books Online, accessible via the Worldwide Services tab on the Siebel Systems Web site (www.siebel.com). Through Siebel Books Online, you can order additional Siebel documentation and copies of the *Siebel Bookshelf for Siebel eBusiness Applications* CD-ROM.

Another source of information is the *Siebel Online Help*.

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Do you know how to access Siebel Technical Support? It is crucial that you understand the requirements for getting support. This will ensure the best experience possible. If you have questions, please don't hesitate to contact us.

To maximize your knowledge of Siebel products and your return on investment:

- You must attend Siebel training to become a "designated contact."
- Your trained designated contacts provide technical support to your users. Siebel Technical Support provides support directly to your "designated contacts" only.

To provide efficient and timely support, and to empower you in the process:

- Siebel Technical Support is primarily Web-based, accessed via Siebel SupportWeb (http://supportweb.siebel.com). Please submit new service requests to us through SupportWeb, where you can also search the knowledge base for solutions.
- Designated contacts receive read/write access to SupportWeb. All other project team members at your company receive a read-only account to ensure they can reap the benefits of the support knowledge base.

To register for Siebel training, please access http://www.siebel.com/education/ and choose Siebel Customer Technical Education. Questions on the above can be directed to Siebel Technical Support at:

eBusiness Customers:	support@siebel.com
MidMarket Edition Customers:	swasupport@siebel.com or:

Americas: eBusiness: 800.214.0400 or 650.295.5724   MidMarket: 800.354.1571

London:	+44.1784.494.949	Tokyo:	0120.606.750 (Japan domestic only), +81.3.5469.3811 (Outside of Japan)
Munich:	+49.89.95718.400	Singapore:	+65.320.8533 (main number)

Please submit technical issues and updates to Siebel SupportWeb (http://supportweb.siebel.com). If you do not have a SupportWeb account, please email us at the relevant email address above. We appreciate your business and look forward to working with you to ensure 100% customer satisfaction.

Siebel Welcomes Your Comments

To help us with future versions, we want to know about any corrections or clarifications that you would find useful. Please include in your message:

- The title and version of this guide
- Your name, company name, job title or functional area, phone number, and email address

Write to us via regular mail or email at:

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We appreciate your feedback.

Sales Assistant 1

About the Sales Assistant

The Sales Assistant provides tools your organization can use to institute best practices, to present a consistent face to the customer, and to ensure that your entire organization works efficiently.

Sales Assistant consists of three major components:

Sales Methods. This tells end users, usually members of your sales force, the sales stages typical for their opportunities. Sales methods can differ even within one organization; for instance, a sales method made up of ten or fifteen stages may be necessary for dealing with complex, multimillion dollar opportunities, while a sales method containing only four stages is appropriate for a low dollar value opportunity. See "Setting Up Sales Methods" on page 1-4.

Activity Templates. These generate a group of activities that logically go along with an opportunity type, based on some standard process. For instance, you might set up activity templates for making corporate visits, for calling the customer, or for conducting a briefing. The activity template tells your sales force what steps to take during the sales process, and provides recommended lead times as well. See "Setting Up Activity Templates" on page 1-8.

Assessments. Assessments evaluate what your sales representatives know or don't know about an opportunity, by rating their information versus a model opportunity. The resulting "score" helps the sales representative understand which accounts have strong potential for partnership, or which opportunities are likely to close during a given quarter. See "Setting Up Assessment Templates" on page 1-11.

As sales administrator, you associate activity templates and assessments to specific stages in the sales process. Then, during the sales process, Sales Assistant prompts your sales representatives with reminders of important milestones.

NOTE: The Sales Assistant includes Activity Templates and Assessments; the Service Assistant also includes an extended version of Activity Templates. For more information on the Service Assistant, see Chapter 2, "Service Assistant."

The Sales Assistant Process

Figure 1-1 illustrates the Sales Assistant workflow.

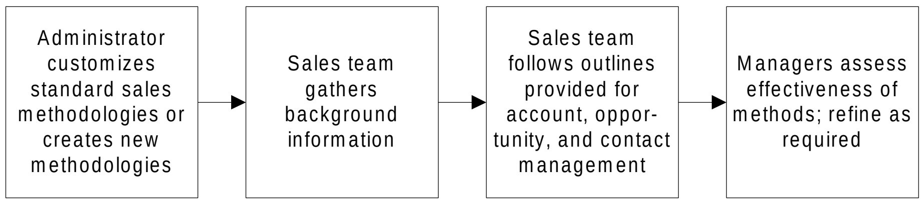

Figure 1-1. Sales Assistant Workflow

At the core of the Sales Assistant are established sales methods. A sales method is an approach used in the sales process. As a sales administrator, you set default sales methods and sales stages.

You then associate the sales stages to activity templates. This association drives the important milestone reminders that Sales Assistant provides to your sales force, as they proceed through the sales cycle.

Finally, you set up assessment templates and associate those with sales stages as well. These provide your sales force with valuable information about the potential of their opportunities.

Table 1-1 lists the tasks, roles, and views associated with Sales Assistant.

Table 1-1. Sales Assistant Setup

Task	Role	View (Accessed from the Screens Menu)
Setting default methods	Administrator	Siebel Assistant Administration → Sales Methods
Setting personal default methods	All users	View → Options → Opportunities
Modifying default methods and sales stages	Administrator, user groups	Siebel Assistant Administration → Sales Methods
Defining and modifying activity templates	Administrator	Siebel Assistant Administration → Activity Templates
Defining and modifying assessment templates, attributes, and their values	Administrator	Siebel Assistant Administration → Sales Assessment Templates

Setting Up Sales Methods

As an administrator, you can set up the methods and sales stages that most closely resemble your organization's desired sales process. A method may encompass every activity associated with the sales process, from prospecting, to forecasting, to closing deals. You can set up as many methods and sales stages as your organization needs, so your salespeople can use the method most appropriate for their opportunities. You assign an existing sales method as the default for a Siebel implementation.

A sales method specifies the stages that salespeople should go through to make a successful sale—from prospecting, to qualification, to closing. Different opportunities call for different sales methods, and your Siebel application supports multiple sales methods for a single organization. Thus, organizations can set up customized sales procedures specific to each opportunity; they can also set up preferred sales methods for organizations and individuals.

This means that sales methods are opportunity-dependent, and any sales method can be associated with any opportunity. All methods are visible to all users.

NOTE: Only the primary salesperson on the team can change the sales method, but any member of the team can change the sales stage.

To automatically associate a sales method to an opportunity, salespeople can select View → Options and then the Opportunities tab. Then they can select a personal default sales methodology. This does the following:

- This preference will be saved for a particular user in the \bin\[user]\Siebel.pre file.
- This preference will override the configuration of the predefault values for the Sales Method and Sales Method Id fields in the Opportunity Business Component.

  NOTE: If a user tries to predefault the value through a Tools configuration change, and the Default Sales Method value has been specified in the client and the value is different, the value specified in the client will override the Tools modification.

Defining Sales Methods and Stages

You use the Sales Method Administration view, shown in Figure 1-2, to define sales methods and to associate sales stages with each of those methods.

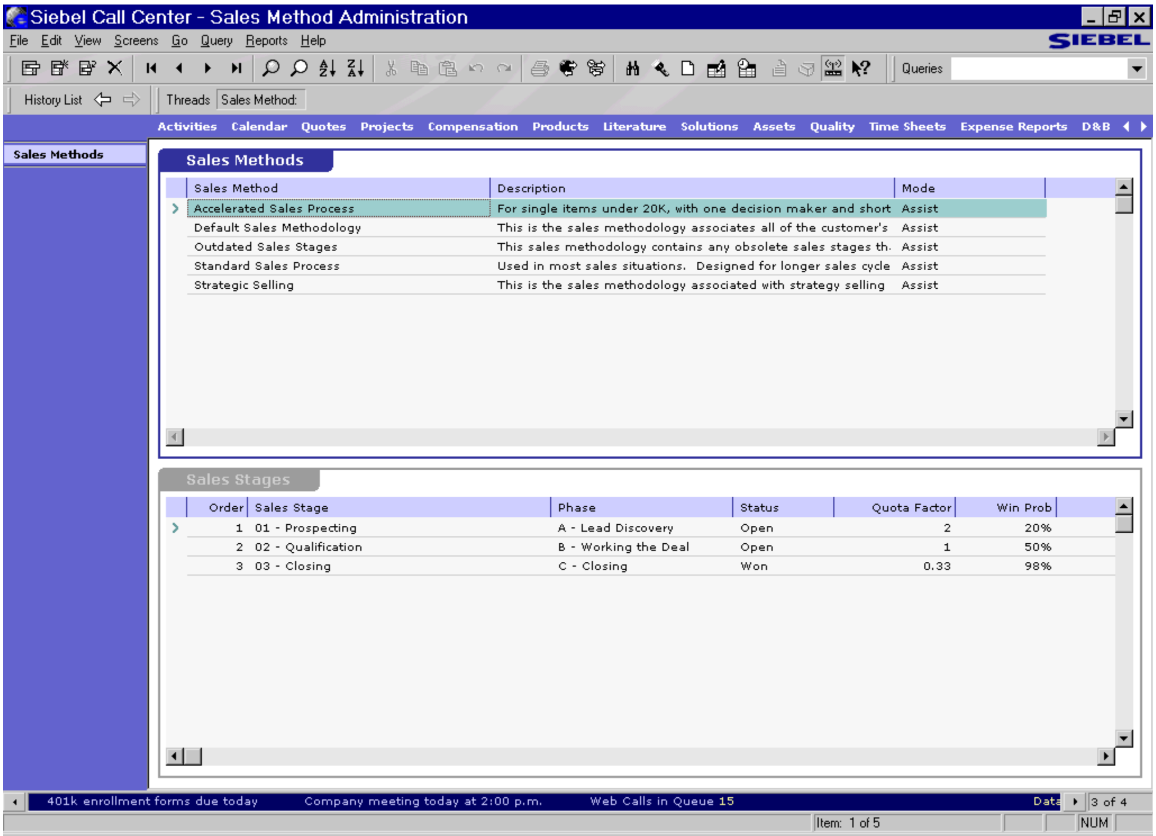

Figure 1-2. Sales Method Administration View

To add a sales method

1. Choose Screens → Siebel Assistant Administration → Sales Methods.

   The Sales Method Administration view appears.

2. Choose Edit → Add New Record.

   A new row is added to the list.

3. Enter a unique, descriptive name in the Sales Method field (required).

   For example, the names Accelerated Sales Process and Telesales Process are sufficiently clear for your sales force to understand.

4. Describe the method in the Description field. Click the ellipsis (...) button to enter lengthy text or comments in a text box.

5. Create sales stages for this sales method, using the following procedure, "To add a sales stage," for each stage.

To add a sales stage

1. From the Sales Methods list applet in the Sales Method Administration view, select the sales method to which you want to add a stage.

2. Select the Sales Stages list applet and choose Edit → Add New Record.

   A new row is added to the list.

3. Complete the fields; some fields are described in Table 1-2 on page 1-7.

Table 1-2. Selected Fields in the Sales Method Administration View (Sheet 1 of 2)

Field	Comments
Duration	The number of days in a particular stage required for an average deal under average circumstances.
Order	Required. Defines the order in which the sales stage will be displayed in the list of values in the Opportunity view.
Phase	This value is used for rolling up many different methods into phases. Select the one that best matches the stage you are currently adding. For example, the stage called Prospecting would best match the phase "lead discovery." You can create more phases in the List of Values, with a Type of SALES_STAGE_PHASE_TYPE. For more information on the List of Values, see the *Siebel Applications Administration Guide*.
Quota Factor	Required. The quota factor, a multiplier of the sales quota, determines the amount by which a sales representative's quota will be multiplied for that particular sales stage. The expectation is that as you move deals from one stage to another, some deals will fall out of the pipeline. In order to eventually close $1,000,000 in revenues, you might need $10,000,000 worth of stage 01 deals, or $5,000,000 worth of stage 04 deals, or $1,500,000 of stage 08 deals. This means your quota factors in this case will be 10 for stage 01, 5 for stage 04, and 1.5 for stage 08. In your Siebel application, a sales representative's quota is the sum total of that person's revenue quota objectives on all of his or her active quota plans. For more information on setting quotas, see the *Siebel Sales Quota Administration Guide* The default value is 1. You must enter Quota Factors for the Opportunity Sales Pipeline Analysis chart to show data.
Sales Stage	Required. This name will appear in the list of values from which the user selects.
Stalled Deal Limit	The number of days that an opportunity can be in a particular sales stage. If the opportunity exceeds this limit, you consider the deal stalled. However, nothing happens in your Siebel application to change the sales stage or any other aspect of the opportunity.

Table 1-2. Selected Fields in the Sales Method Administration View (Sheet 2 of 2)

Field	Comments
Status	Your choices in this picklist are Open (the default), Won, and Lost. Siebel Marketing uses this information. This is a required field. You can create more phases in the List of Values, with a Type of SALES_STAGE_STATUS. For more information on the List of Values, see the *Siebel Applications Administration Guide*.
Win Prob	The probability, or likelihood (out of 100), that, after successfully completing this stage, the deal will be eventually won. In theory, the later the stage, the higher the win probability should be, because each stage brings the salesperson closer to winning the deal.

Setting Up Activity Templates

Activity templates provide your sales force with a quick list of all activities required to successfully complete a task. For example, this is a list of activities that could be required for planning a corporate visit:

1. Book a conference room.
2. Set an agenda.
3. Confirm date and time with a customer.
4. Make arrangements for presenters.

Activity templates enable the user to generate this list of activities at the press of a button, simply by requesting a corporate visit. They also provide an easy way of finding, assigning, scheduling, and checking the progress of these activities all in one quick, easy place. As a sales administrator, you can add, copy, change, delete, or make public all activity templates. You can also add, copy, change, or delete the activities listed for an activity template.

Creating Activity Templates

The first step in working with activity templates is to create them.

To create an activity template

1 Choose Screens → Siebel Assistant Administration → Activity Templates.

The Activity Template Administration view appears.

2 Choose Edit → Add New Record.

3 Choose an activity template type from the Type picklist.

You can create more activity template types in the List of Values, with a Type of TEMPLATE_OBJECT_TYPE. For more information on the List of Values, see the *Siebel Applications Administration Guide*.

4 Provide a name for the activity template in the Name field. This field is required.

5 Describe the activity template's purpose in the Description field. This field is required.

6 Click the ellipsis (...) button in the Sales Stages field, and in the Sales Method - Stage dialog box that appears do this:

a Click New.

In the Select Sales Method - Stage dialog box that appears, you can sort the list of stages according to Sales Method, Sales Stage, or Stage Description. You can also set a Find filter to narrow the list further.

b Once you've selected the sales methods you wanted, click Add in the Select Sales Method - Stages dialog box.

c Click Close in the Sales Method - Stage dialog box.

Once you have associated a sales stage to the activity template, Sales Assistant automatically invokes that template when the sales representative moves an opportunity into that sales stage.

You can modify or delete any existing activity template from this view.

NOTE: When you delete an activity template, any activity plans which reference this template are also deleted.

To add an activity template by copying

1. Select an activity template in the Activity Templates applet, preferably one similar to the activity you want to add.
2. Click Copy in the Form applet.
3. Make the desired changes.

   You save time setting up the new activity template by modifying the fields you copied from the existing activity template.

Associating Activities with Templates

After you've created an activity template, you can associate activities with the template.

To add an activity to a template

1. Choose Screens → Siebel Assistant Administration → Activity Template Details.

   The Activity Template Details view appears.
2. In the Activity Template form applet, find the activity template with which you want to associate activities.

   NOTE: You can use query by example (QBE) to find the activity template.

   ---
3. When the correct activity template appears in the Activity Template form applet, select the Activities list applet.
4. Choose Edit → Add New Record.

5 Complete the fields; some fields are described in the following table.

Field	Comments
Activity Type	Required.
Alarm	Whether an Alarm should go off when it is time for the activity.
Assigned To	Username of the person who is to perform the activity. Leave this field blank for the activity to be assigned to the active user.
Description	Required.
Duration	Number of Units needed to complete the activity. For example, if Units is set to Days, and the activity takes 30 days, then set Duration to 30.
Lead	The lead time for the activity.
Lock Assignment	Whether the Assigned To field should be locked. If the activity is locked, Assignment Manager will leave it alone. If it is unlocked, Assignment Manager can reassign it.
Units	Units of time to measure the duration of the activity.

Setting Up Assessment Templates

An assessment is an evaluation of an account, opportunity, or contact based on a set of criteria or attributes. Assessments provide a quick, easy way to evaluate accounts and opportunities side-by-side, using criteria that are important to your sales situations.

When evaluating your accounts, opportunities, or contacts, you can make comparisons based on several criteria, so that you get a better understanding of what you know, what you don't know, and where you should spend your time. When you are qualifying an account, for example, you could evaluate the account using attributes like "Annual Revenue" and "Number of End Users" to determine the account's suitability for the organization's product.

Using sales assessment templates, you can handle different accounts in different ways. For example, you probably will set up assessments for accounts with high annual revenues and a large number of end users very differently than assessments you set for low annual revenue accounts with a small number of users.

An assessment template is a model used to generate an assessment. It may be associated with a sales method or with a sales stage, or it may be generic to any method and any sales stage.

As an administrator, you can add, copy, change, delete, or make public all assessment templates, template attributes, and their values. You perform these tasks in the Sales Assessment view, shown in Figure 1-3.

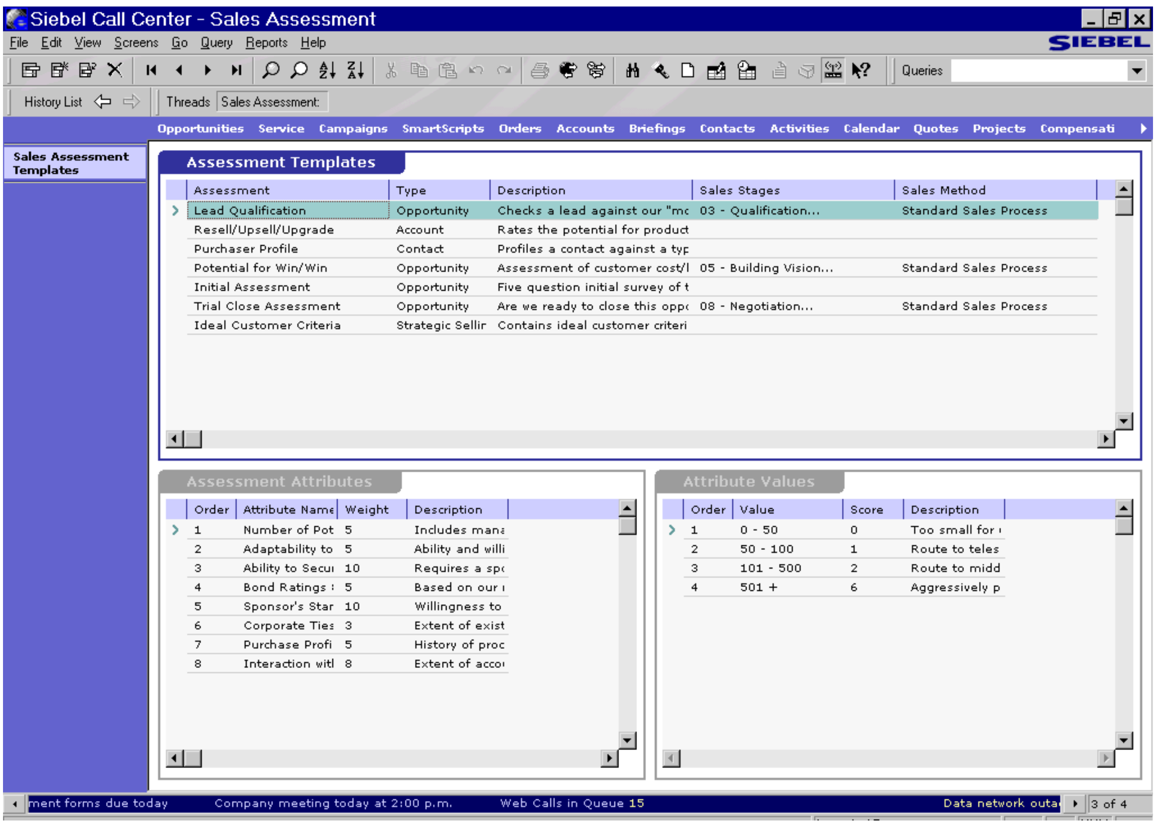

Figure 1-3. Sales Assessment View

Creating and Modifying Assessment Templates

An assessment template is a model used to generate an assessment. It may be associated with a sales method or with a sales stage, or it may be generic to any method and any sales stage. The first step in generating an assessment, then, is to create an assessment template.

To create an assessment template

1. Choose Screens → Siebel Assistant Administration → Sales Assessment Templates.

   The Sales Assessment view appears.

2. Choose Edit → Add New Record.

   An empty row is added to the list.

3. Complete the fields; some fields are described in the following table.

Field	Comments
Assessment	Required. The name of the template.
Type	Required. You can create more phases in the List of Values, with a Type of TEMPLATE_OBJECT_TYPE. For more information on the List of Values, see the *Siebel Applications Administration Guide*.
Sales Method	Read-only.
Sales Stages	For associating the template with one or more sales stages. Once you have associated a sales stage to the assessment template, Sales Assistant automatically invokes that template when the sales representative moves an opportunity into that sales stage.

To make other changes

- Modify a record by selecting a field and changing the information.
- Cancel all the changes you've made to a record before you leave that record by choosing Edit → Undo Record.
- Delete a record by selecting the row and then choosing Edit → Delete Record.

Defining Assessment Template Attributes and Values

An attribute is a characteristic of an account, an opportunity, or a contact that is tracked by a sales organization during an assessment. Every attribute has a name, a weight, a set of allowable values, and a description field.

For instance, a common attribute for an account might be "Credit History." The values for this attribute might include "Excellent," "Good," "Average," and "Poor." Each of these values carries a "score" and instructions for the sales representative on how to proceed if that value is selected. The score is determined by a weight you previously assigned to that value. The weight is the attribute's relative importance to your organization.

As an administrator, you can add, copy, modify, or delete the list of attributes displayed in the Assessment Attributes list applet in the Sales Assessment view. (See Figure 1-3 on page 1-12.) For each attribute, you must define a list of allowable values in the Attribute Values applet in the same view.

To add an attribute for a template

1. Choose Screens → Siebel Assistant Administration → Sales Assessment Templates.

   The Sales Assessment view appears.

2. Select the Assessment Templates list applet, and select the template to which you want to add an attribute.

   The Assessment Attributes list applet shows the attributes associated with this template.

3 Select the Assessment Attributes list applet, and choose Edit → Add New Record.

A new row is added to the list.

4 Complete the fields; some fields are described in the following table.

Field	Comments
Attribute Name	Required.
Order	Indicates the order in which the attribute value will be listed on the picklists and on the Sales Method applet.
Weight	Required. The attribute's relative importance to the organization.

To make other changes

- Modify a record by selecting a field and changing the information.
- Cancel all the changes you've made to a record before you leave that record by choosing Edit → Undo Record.
- Delete a record by selecting the row and then choosing Edit → Delete Record.

To add an attribute value

1 Choose Screens → Siebel Assistant Administration → Sales Assessment Templates.

The Sales Assessment view appears.

2 Select the Assessment Attributes list applet, and select the attribute to which you want to add a value.

The Attribute Values list applet shows the values associated with this attribute.

3 Select the Attribute Values list applet, and choose Edit → Add New Record from the Attribute Values list applet.

A new row is added to the list.

4 Complete the fields; some fields are described in the following table.

Field	Comments
Order	Required. Indicates the order in which the attribute will be listed on the picklists and on the Sales Method applet.
Score	Required. The score reflects the value of the answer. For instance, if the question is about credit history, a “bad” answer (bad credit history) would be a low, or even negative, score. A good credit history, on the other hand, would result in a higher score. You multiply each score by the weight for that line item in the assessment, which results in an overall score.
Value	Required. Determines one of the choices a user will have when assigning a value to an attribute.

To make other changes

- Modify a record by selecting a field and changing the information.
- Cancel all the changes you’ve made to a record before you leave that record by choosing Edit → Undo Record.
- Delete a record by selecting the row and then choosing Edit → Delete Record.

Understanding Assessment Engine Functionality

As you administer assessments, you may want to understand the underlying data relationships and functionality of assessments.

For every assessment, you select one assessment template to use to generate attributes to assign values to. Each assessment may have several associated assessment attributes, and each attribute may have more than one associated value. However, in your unconfigured Siebel application, only one value is stored per attribute.

When you create and save an assessment, your Siebel application goes through the attributes for the assessment template, and instead of associating those existing attribute records to the assessment, it creates new records in the Sales Assessment Value Business Component. A new record is created for each assessment/attribute combination and the record stores the Assessment Id, the Attribute Id, Score, and Value for the attribute. The last two items come from the Sales Assessment Attribute Value Business Component, and the value is chosen by the user in a picklist.

One sales assessment value record may point to only one sales assessment attribute value record, but one sales assessment attribute value may be associated to many sales assessment value records. They are related by their associated Attribute Ids.

Service Assistant 2

About the Service Assistant

The Service Assistant provides additional activity template tools that enhance the Sales Assistant, which your field service organization can use to institute best practices, to present a consistent face to the customer, and to ensure that your entire organization works efficiently.

Table 2-1 describes the views to set up and configure the additional features of the Service Assistant.

Table 2-1. Screens and Views for Configuring the Service Assistant

Screen and View	Description
Siebel Assistant Administration → Activity Templates	Sets up activity templates. For more information, see Chapter 1, “Sales Assistant.”
Siebel Assistant Administration → Activity Template Details	Describes additional conditions for activity templates. For more information, see Chapter 1, “Sales Assistant.”
Siebel Assistant Administration → Service Activity Details	Describes additional conditions for service activities.
Siebel Assistant Administration → Service Activity Steps	Records the recommended steps in a service activity.
Siebel Assistant Administration → Service Activity Skills	Records the skills required to complete a service activity.
Siebel Assistant Administration → Service Activity Parts and Tools	Lists the parts and tools required to complete a service activity.
Siebel Assistant Administration → Service Activity Instructions	Records instructions for a service activity.

Prerequisites

The first step in setting up the enhanced activity templates of the Service Assistant is to have completed the following tasks in Chapter 1, “Sales Assistant”:

- “Creating Activity Templates” on page 1-9
- “Associating Activities with Templates” on page 1-10

Once you have done this, you can set up the additional activity template features of the Service Assistant.

Setting Up the Service Assistant

Now that you have set up activity templates and associated activities with them, you can set up the following Service Assistant features:

- Service Activity Details
- Service Activity Steps
- Service Activity Skills
- Service Activity Parts and Tools
- Service Activity Instructions

These setup tasks are described in the following sections.

Service Activity Details

The Service Activity Details view shows the activity template and the various service activities associated with it.

To set up service activity details

1. Choose Screens → Siebel Assistant Administration → Activity Templates.

   The Activity Template Administration view appears.

2. Select the activity template with which you want to associate activity details.

   NOTE: You can use query by example (QBE) to find the activity template.

   ---

3. Click Service Activity Details in the view bar.

   The Service Activity Details view appears.

4. Select a Category in the Service Activities list applet or the Service Activity Detail form applet.

   Categories are a way to classify activities, for activity analysis in your Siebel Field Service product. For more information, see the *Siebel Field Service Guide*.

   You can create more categories in the List of Values, with a Type of FS_ACTIVITY_CLASS. For more information on the List of Values, see the *Siebel Applications Administration Guide*.

Service Activity Steps

An activity might actually require several detailed steps; list these steps here to ensure that all your employees perform the same steps, in the same order.

To set up service activity steps

1. Choose Screens → Siebel Assistant Administration → Activity Templates.

   The Activity Template Administration view appears.

2. Select the activity template with which you want to associate activity steps.

   NOTE: You can use query by example (QBE) to find the activity template.

3. Click Service Activity Steps in the view bar.

   The Service Activity Steps view appears.

4. Select the Steps list applet.
5. Choose Edit → Add New Record.

   An empty row is added to the list.

6. Select the Step field and open the Pick Step dialog box; either select an existing step and click Pick, or enter a new step and description and click Pick.
7. Enter a sequence, and comments if you wish.

Service Activity Skills

You may want to associate skills with activities for the following reasons:

- Assigned people can look up the skills needed for a particular activity and prepare themselves to complete the activity.
- The Assignment Manager can use this information to assign the activity to the person with the correct skills.
- The Assignment Manager can use this information to discriminate between the skill levels of different persons.

For example, if an activity needs a person with skills in the CD ROM product line, Assignment Manager can both find people who have this skill, and find people who have the skill level for this skill. For more information on Assignment Manager, see the *Siebel Assignment Manager Administration Guide*.

To set up service activity skills

1. Choose Screens → Siebel Assistant Administration → Activity Templates.

   The Activity Template Administration view appears.

2. Select the activity template with which you want to associate activity steps.

   NOTE: You can use query by example (QBE) to find the activity template.

   ---

3. Click Service Activity Skills in the view bar.

   The Service Activity Skills view appears.

4. Select the Service Activity Skills list applet.
5. Choose Edit → Add New Record.

   An empty row is added to the list.

6. Choose a skill.

   Skills must exist before you can add them; skills are added using Siebel Tools.

7. Select the Service Activity Skill Items list applet.
8. Choose Edit → Add New Record.

   An empty row is added to the list.

9. Complete the fields.

   The fields you see will depend on the skill you are adding items for.

Service Activity Parts and Tools

Using the Service Activity Parts and Tools view, you can associate the necessary parts and tools needed for an activity. This is useful for an agent or a call dispatcher to assign an activity.

For example, an activity needs a new part and a tool for the engineer to perform the repair activity at the customer site. Using this view, the agent can find out the part needed, look up the trunk inventory for the engineer, and, if the part is not in the engineer's trunk, create a new order for the part and ensure it reaches the site before the engineer starts the activity.

To set up service activity parts and tools

1. Choose Screens → Siebel Assistant Administration → Activity Templates.

   The Activity Template Administration view appears.

2. Select the activity template with which you want to associate activity steps.

   NOTE: You can use query by example (QBE) to find the activity template.

   ---

3. Click Service Activity Parts and Tools in the view bar.

   The Service Activity Parts and Tools view appears.

4. Select the Parts and Tools list applet.
5. Choose Edit → Add New Record.

   An empty row is added to the list.

6. Select an item from the Part/Tool field.

   The items in the Pick Product dialog box have been set up first in the Product Administration view. For more information on setting up products, see the *Siebel Marketing Administration Guide*.

   NOTE: If the item is a part, the Tool field will be blank. Similarly, if the item is a tool, the Tool field will be selected.

Service Activity Instructions

Activity instructions are additional information—like notes, instructions, and directions—which may not necessarily be steps in an activity, but information associated with it.

To set up service activity instructions

1. Choose Screens → Siebel Assistant Administration → Activity Templates.

   The Activity Template Administration view appears.

2. Select the activity template with which you want to associate activity steps.

   NOTE: You can use query by example (QBE) to find the activity template.

   ---

3. Click Service Activity Instructions in the view bar.

   The Service Activity Instructions view appears.

4. Select the Instructions list applet.
5. Choose Edit → Add New Record.

   An empty row is added to the list.

6. Select an item from the Type field.

   You can create more types in the List of Values, with a Type of FS_NOTE_TYPE. For more information on the List of Values, see the *Siebel Applications Administration Guide*.

7. Enter the information in the Instruction field.

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