

SIEBEL[®] eBUSINESS APPLICATIONS

SIEBEL BASICS

SIEBEL 2000

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Siebel Basics

Overview

This booklet tells you some of the most important things you need to know to use Siebel eBusiness Applications. It's organized around the major parts of the application's interface—including such Windows-generic items as the menus and the toolbar, as well as such Siebel-specific elements as the tab bar and the view bar. While looking at each of these interface elements, you'll come to understand several major Siebel concepts and will learn how to navigate the application to get your job done.

You'll find this booklet useful to read before you get your Siebel application and upon first opening and using the application. You can use the following page as a quick and easy introduction to the key navigation concepts in the rest of the booklet.

Use the commands in the **menu bar** to access all application features, including queries and reports.

The pointer indicates the **active record**.

Click the hyperlink to **drill down** for more information.

Click a screen name on the **tab bar** to go to the default view for that screen.

You can choose from a list of **predefined queries**.

The **view bar** shows all the available views for the active screen.

A **list applet** shows multiple rows of records, one record per row.

A **form applet** shows fields from the current record and enables easier data entry.

The screenshot displays the Siebel Call Center interface. At the top is the menu bar (File, Edit, View, Screens, Go, Query, Reports, CTI, Actions, Help) and a toolbar. Below is a tab bar with various screens like Opportunities, Service, Campaigns, SmartScripts, Orders, Accounts, Briefings, Contacts, Activities, Calendar, Quotes, Projects, and Compensation. A left-hand view bar lists various application features. The main area is divided into two applets: a list applet and a form applet. The list applet shows a table of account records with columns for Account, Site, Main Phone Number, and Main Fax Number. The form applet below it shows fields for editing an account, including Account, Site, Address, City, State, Zip, Synonyms, Account Type, Account Team, Territories, Industries, Main Phone #, Main Fax #, Status, Current Volume, and Total Potential. A status bar at the bottom provides system information like 'Company meeting today at 2:00 p.m.', 'Calls in Queue 15', and 'Abandon Rate 2%'.

Account	Site	Main Phone Number	Main Fax Number
* Providence Trucking	HQ	(408) 249-7700	(408) 249-7701
Queens Beasts Pet., Plc	Cambridge		
Quiver Systems	Milwaukee	(414) 882-3000	(414) 882-3003
RS Semiconductors	San Jose	(408) 726-8700	(408) 726-4532
Raise Construction Co.	Hayward	(510) 444-3200	(510) 444-3266
Ramnek Advisors	CA	(415) 987-5786	
Ramnek Advisors	HQ	(212) 654-1500	(212) 650-1640
* Real Travel	Norcross	(404) 943-8843	(404) 943-8744
Renaults	Plant		
Rhodes			
Robertson Enterprises	Dallas	(214) 909-6500	(214) 909-6504
Rocky Mountain Computers	HQ	(704) 992-2300	(704) 992-2302
Routers, Inc.	HQ	(800) 979-4545	(800) 979-4544
* Royal Hotel	CA		
* Royal Hotel	Executive Offices	(305) 443-2345	(305) 443-9000
Rush Medical Center	Chicago	(312) 243-6500	
SF County Administration	CA		
SF County Sheriffs Department	CA		
SRAC North America, Inc.	SF	(415) 756-1240	(415) 756-1240

The **message bar** displays scrolling updates from your organization.

Click the drop-down arrow button to choose from a **picklist of valid choices**.

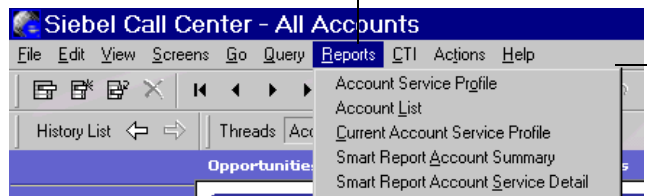
The **status bar** tells you information such as how many records match your search criteria.

Click the ellipsis button to see the whole field or a **multi-value group**.

Menu Bar

Like most Windows applications, the Siebel user interface shows a menu bar at the top. You use this menu bar to choose any of the application's commands, as shown in [Figure 1](#).

To see the list of commands under a menu, click the menu name. For example, the Reports menu shows which reports you can run.



The list of commands that appears depends on where you are in the application; in another context, you would see a different list of reports.

Figure 1. Using the Menu Bar

Using Submenus

In addition to commands, some menus contain submenus, as shown in [Figure 2](#).

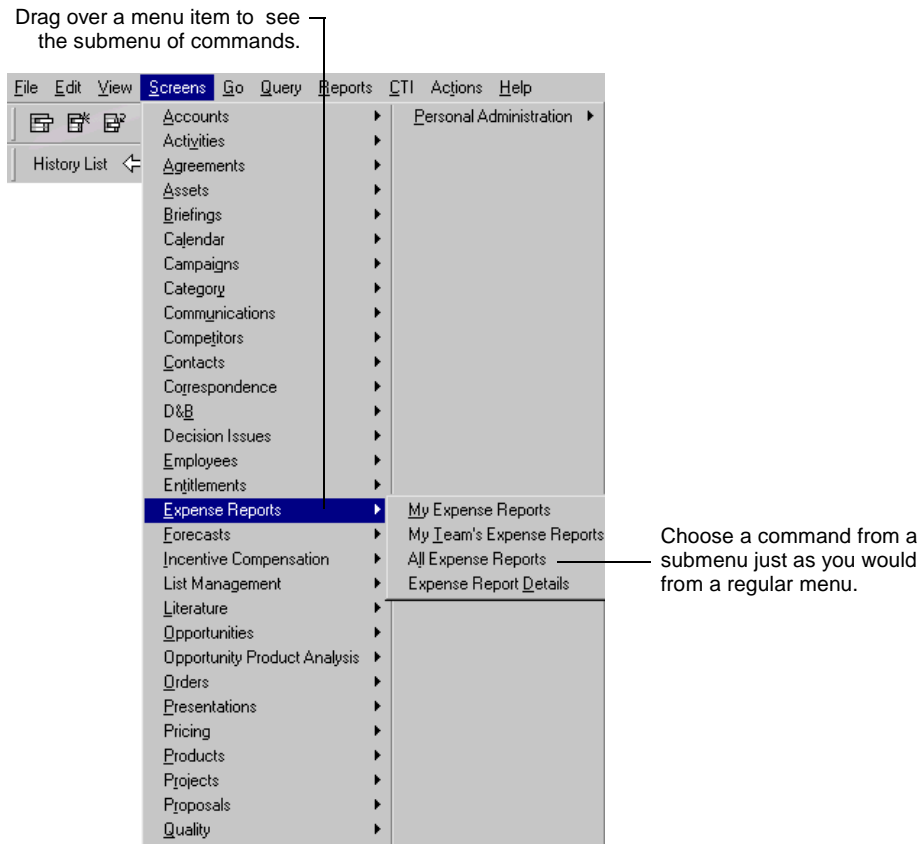


Figure 2. Submenus

Other Ways to Perform Actions

Many of the commands in the menu bar are also available in other parts of the application. The two most common alternatives are:

- Right-clicking, which brings up a shortcut menu of commands.

As with other Windows applications, the menu that appears depends on where you right-click. For example, right-clicking inside a form applet brings up the commands New Record, Copy Record, and Delete Record. On the other hand, right-clicking *inside a field* on a form applet also brings up Copy, Paste, and Select All because these commands make sense in that context.



Figure 3. Right-Clicking

- Using shortcut bars.

These include the toolbar (described on [page 6](#)), the tab bar (on [page 13](#)), and the view bar (on [page 16](#)).

Toolbar

As with other Windows applications, the toolbar gives you quick access to the most commonly used commands: clicking a button on the toolbar is equivalent to choosing a command from a menu in the menu bar.

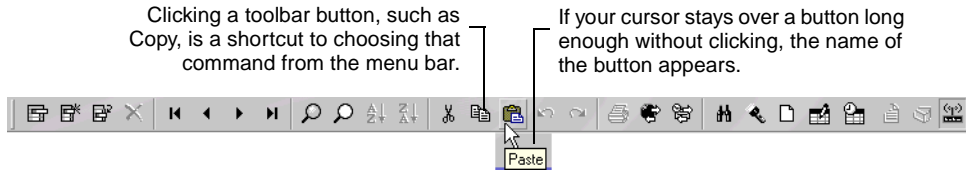


Figure 4. Taking Shortcuts on the Toolbar

Working with Records

A group of related pieces of information is called a *record*. For example, all the information about a contact—including the contact’s name, address, and phone number—make up a Contact record.

When you use Siebel applications to add new information or retrieve existing information, you’re working with records.

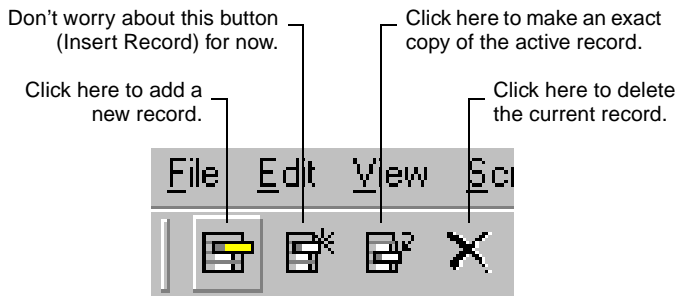


Figure 5. Adding, Copying, or Deleting a Record

After you add a record, or copy an existing one, you can enter information in the record's fields, as shown in [Figure 6](#).

To move to the next field, press TAB or click inside the new field.
 To modify a record, click a field and start typing.

New		Delete		Copy		Cancel	
Account	Patisserie Nouve	Site	San Franci:	Synonyms	PNC	Main Phone #	(415) 657-2300
Address	234 Market Street			Account Type	Commercial	Main Fax #	(415) 657-2346
City	San Francisco	State	CA	Account Team	HALACON	Status	Active
Zip	94111	Country	USA	Territories		URL	
				Industries	Hotel Services		

Figure 6. Modifying a Record

Moving from Record to Record


When you're looking at a list of records, the row pointer (>) shows which record is *active*—the one you intend to act on. For example, when you choose the Copy Record command, it's the active record that will be copied.

The > and the highlighting show which record is active.

Account	Site	Main Phone Number	Main Fax Number	Industries	URL
Patisserie Nouvelle, C	San Francisco	(415) 657-2300	(415) 657-2346	adhesives & sealants...	
Performance Comput	Menlo Park	(415) 329-6500	(415) 329-6511	adjustment & collection services..	
Perini Construction	SF	(415) 677-9800	(415) 677-9854	computer facilities management.	
Peter's Coffe Cafe's	Oakland			computer integrated systems de:	
Petersen Consulting	Atlanta	(404) 581-4527	(404) 581-4539	computer facilities management.	
Petersen Consulting	Dallas	(214) 357-9945	(214) 357-9950	computer related services...	
Petersen Consulting	HQ	(415) 885-3000	(415) 885-2200	computer related services...	
Petersen Consulting	Los Angeles	(310) 442-5444	(310) 442-5445	computer peripheral equipment..	
Petersen Consulting	New York	(212) 357-9945	(212) 357-9950	manufacturing industries...	
Phillips Controls	CA			manufactured hardware (general	
Pirelli Systems	Davenport	(925) 485-5438	(925) 640-6021	electrical industrial apparatus...	www.pirelli.com
Pointe Building, Inc.	Phoenix	(602) 258-1000	(602) 258-1087	adjustment & collection services..	
Polar Peripherals	Alaska	(877) 366-9700	(877) 366-9701	computer peripheral equipment...	www.despfreeze.com
Portelli's Catering, Inc	Chicago			manufactured hardware (general	
Postbank Osterreich	Vienna			general automotive repair shops.	
Property Valuation Ser	Miami	(305) 857-7000	(305) 857-7109	general government...	
Providence Trucking	HQ	(408) 249-7700	(408) 249-7701	general industrial machinery...	
Providence Trucking	Sales	(602) 249-7700	(602) 249-7719	general farms, primarily crop...	
Queens Beasts Pets, J	Cambridge			general warehousing & storage...	

Figure 7. Active Record

To move to another record, simply click the desired record. (But don't click the hyperlink or you'll go to another view.)

If you want to move to the next record in the list, you can also use the Next Record button  on the toolbar or use the DOWN ARROW key on your keyboard.

Searching for Information Using the Find Command

Moving from record to record is easy; however, if you have hundreds of records, looking at every single one can be a time-consuming way to find exactly what you're looking for. Doing that would be a little like going through a phone book page by page to find the phone number of a person whose name you know.

A faster way to find information is through the Find command, as shown in [Figure 8](#).

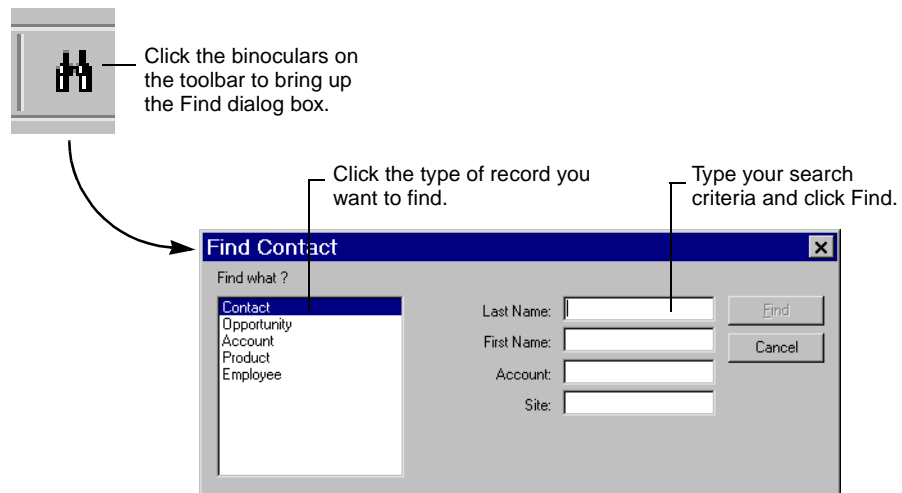


Figure 8. Finding Records Through the Find Command

NOTE: Your Find dialog box may have different items in the two columns, depending on which application you're using.

Using the Find command is fast because you can find records from anywhere in the application. For example, with Find you don't have to be looking at Contacts records to find information about a contact. Also, the Find dialog box displays only the most frequently used records and fields, so entering your search criteria is easy, as well.

If you want to query by records and fields that don't appear in the Find dialog box, use queries, described in the next section.

Searching for Information Using Query by Example

Another way to find information is through *queries*, or query by example. In a query by example (sometimes called QBE), you provide what you already know to find out what you don't. Performing a query by example is a two-step process:

- 1 Entering the query—starting the query and specifying your search criteria
- 2 Executing the query—telling the application to find all records that match your search criteria

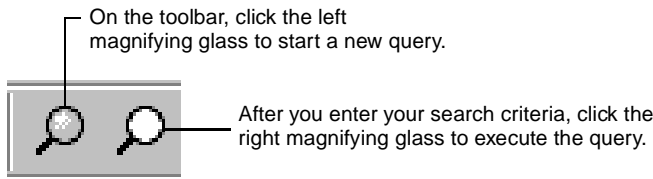


Figure 9. New Query and Execute Query Buttons

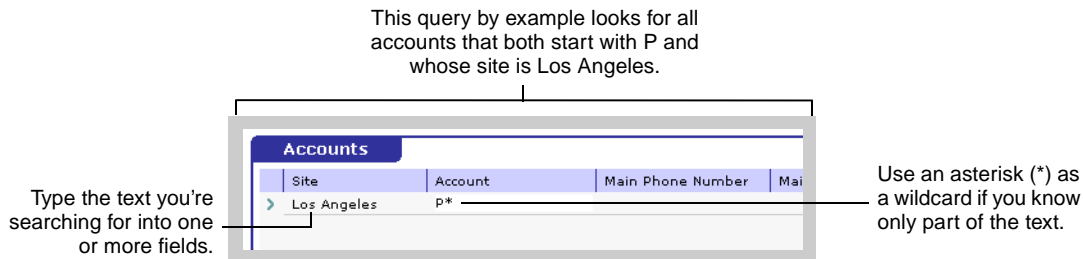


Figure 10. Entering Search Criteria

After you enter your search criteria, remember to click the Execute Query button (shown in [Figure 9](#)) to see the query results. You can also execute your query by simply pressing ENTER.

Once you've run a query, you can save it if you expect to use the same search criteria later. The following section tells you more about reusing queries.

Using Predefined Queries

Your application may come with a set of *predefined queries*. These are queries for which someone has already entered search criteria to save you time. For example, suppose that the person who configured your application knew that you would frequently need to find all accounts located in California. Rather than having you enter and execute this query each time, the configurator might have created a predefined query called “CA Accounts” with these search criteria. Now, when you want to execute the query, all you have to do is choose CA Accounts from the list of predefined queries. You do not need to specify the query criteria because these have already been specified once (and saved).

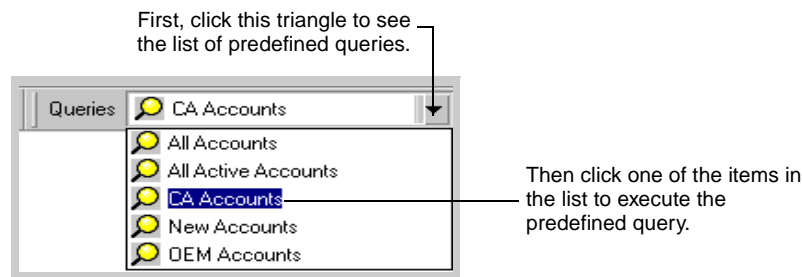


Figure 11. Predefined Queries

You can also save your own queries so that they appear in this menu. After executing your query, just choose Query → Save Query As, and then give your query a name.

Predefining commonly used queries is just one way in which your application can be configured for your needs. You or the person who configures the applications for your entire organization can make many changes to your Siebel application—such as setting which buttons appear in the toolbar and which view appears when you first log on—that may make your particular application look somewhat different from the one shown in this booklet.

Sorting Results

After you've run a query, you can sort its results so they appear in order with respect to any of the fields. For example, you can sort alphabetically on a particular text field or in chronological order on a particular date field. You can also see the items sorted in either ascending or descending order.

You can sort items any time, not only after performing a query. For instructions on sorting, see [“Changing the Sort Order” on page 21](#).

Saving Your Changes

You may wonder whether the toolbar has a Save button. In fact, there is no Save command anywhere in Siebel applications because each application saves your changes as you go along. Each time you leave a record (by clicking anywhere outside of it), your work is saved.

Correcting Mistakes

If you make a mistake as you work with records or queries, you can click the Undo Change button.

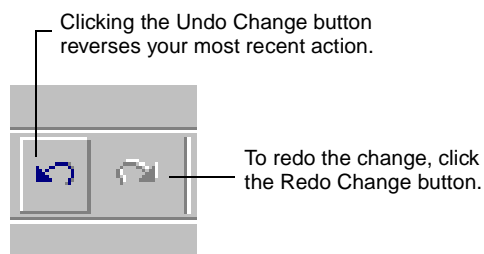


Figure 12. Undo Button and Redo Button

The Undo button is particularly useful if you accidentally press a key and don't know what you did.

If you want to undo all your changes to a record (rather than just the most recent), choose the Undo Record command from the Edit menu. This command undoes any changes you made since the last save—that is, since you last left a record.

Tab Bar

A Siebel application consists of screens, views, and applets—shown on [page 2](#) and explained later in this section. The tab bar, shown in [Figure 13](#), contains the names of the most commonly used screens.

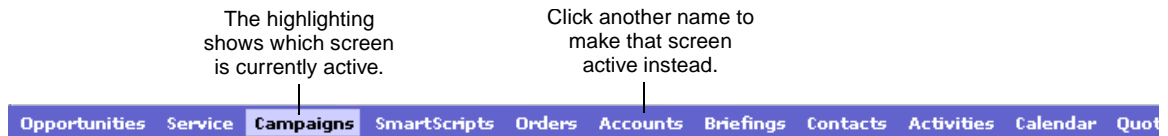


Figure 13. Tab Bar

Screens and Views

The terms *screen* and *view* have somewhat special meanings in Siebel applications. These terms refer to specific parts or aspects of an application, and understanding them is important for finding your way around an application.

The tab bar shows the names of the most commonly used screens.

The Contacts **screen** contains all the available information about contacts.

This circled region is the Contact State Analysis **view**, one of the views available from the Contacts screen.

All the listed **views** are different ways of looking at your contacts.

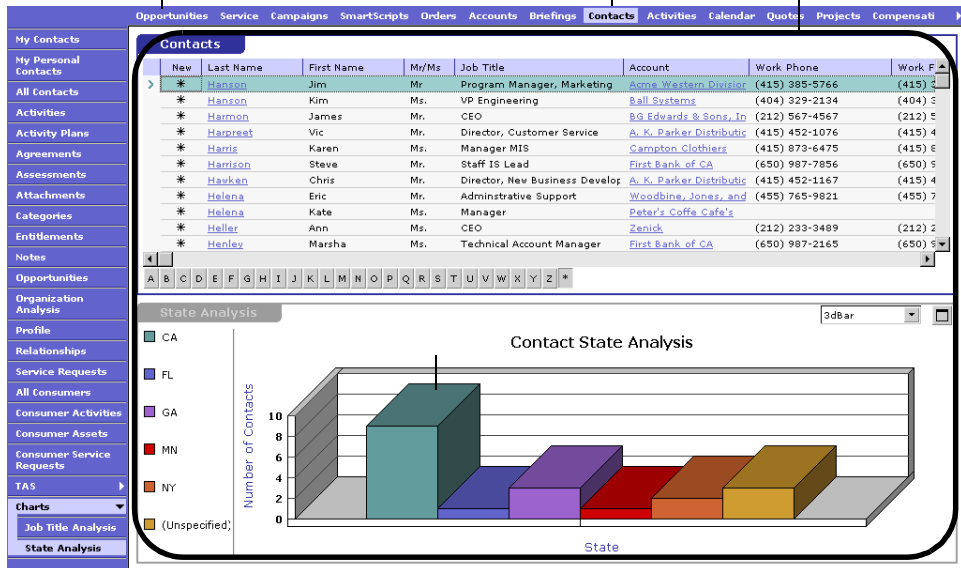


Figure 14. Screens and Views

As you can see from the tab bar, Contacts is just one of several screens available in this application. Other screens in this sales application include information about Accounts, Price Lists, Products, and other sales-related items. The list of views will depend on which screen you're on.

Applets

A view consists of one or more *applets*. An applet is an area of an application's interface that displays records. A list of records is an applet. A single record that looks like a form is also an applet.

For example, the Contact Opportunities view shown in [Figure 15](#) contains two applets: the Contact form applet and the Opportunities list applet. The Contact applet displays one contact record at a time, while the Opportunities applet lists all the records that represent opportunities associated with the contact.

This form applet shows a single contact record.

This list applet shows several records—all opportunities associated with the displayed contact.

Close Date	Opportunity	Revenue	Account	Site
02/25/1998	Q3 Installed Base Campaign - Kevin Alder	\$250,000.00	AMCO Pipe & Line, Co.	San Rafael
10/26/1998	Telesales Lan at AMCO	\$50,000.00	AMCO Pipe & Line, Co.	San Rafael
11/04/1998	Q3 Installed Base Upgrade Campaign - Kevin Alder (1	\$250,000.00	AMCO Pipe & Line, Co.	San Rafael
01/08/1999	CD-ROM Promotion - Kevin Alder	\$500.00	AMCO Pipe & Line, Co.	San Rafael
01/12/1999	Pentium II California Campaign - Kevin Alder	\$55,000.00	AMCO Pipe & Line, Co.	San Rafael
02/08/1999	Desktop Summer Discount - Kevin Alder	\$10,000.00	AMCO Pipe & Line, Co.	San Rafael
02/23/2000	CD-ROM Promotion - Kevin Alder (1-2M10)	\$0.00	AMCO Pipe & Line, Co.	San Rafael
07/30/2000	AMCO Accounting file servers	\$60,000.00	AMCO Pipe & Line, Co.	San Rafael

Figure 15. Applets

View Bar

Now that you understand screens, views, and applets, and know how to use the tab bar to move from one screen to another, take a look at how to move from view to view and applet to applet.

Switching Between Views

Since only one view appears on-screen at any one time, the Siebel interface gives you a fast way to switch from one view to another—the view bar.



Figure 16. View Bar with Tab Bar

NOTE: Different users have access to different views, depending on their responsibility in the organization. For example, salespeople and call center representatives have access to different views than do system administrators or executives in the same organization.

The list of views on the view bar is exactly the same as the list of views under each submenu in the Screens menu. However, clicking a view on the view bar keeps you in the same context (for example, the third record in a list of the four accounts starting with *L*), whereas using the Screens menu starts you over (with the first record in the complete list).

Types of Views

While there are dozens of different views available in a Siebel application, most of them are one of two basic types: a list-form type or a master-detail type.

List-Form View Type

One of the two most common types of view is a *list-form view* (sometimes called simply a *list view*). A list-form view shows a list applet at the top of the screen and a form applet below.

An example of this type of view is My Accounts.

This list applet shows multiple rows of records, one row per account.

This form applet shows most of the fields from the active record—in this case, the active account.

New	Account	Site	Main Phone Number
>	A. K. Parker Distribution	HQ-Distribution	(415) 329-6500
	A. K. Parker Distribution	US	(415) 329-6500
	A. K. Parker Inc.	HQ-Corporate	(415) 329-6500
*	AMCO Pipe & Line, Co.	San Rafael	(415) 491-2300
	AMW	München	
	Acme Inc.	HQ	(510) 245-3000
*	Andercrott Consulting	Palo Alto	(415) 389-5400
*	Andronico's	Berkeley	(510) 568-1200
*	Apex Graphics Inc	SL-Walnutport-035639298	(610) 555-0000
*	B.G. Edwards & Sons, Inc	HQ	(212) 489-1500
*	B.G. Edwards & Sons, Inc	Los Angeles	(213) 486-8900
*	B.G. Edwards & Sons, Inc	Palo Alto	(415) 326-5010
*	B.G. Edwards & Sons, Inc	San Francisco	(415) 742-4500
*	Ball Systems	Downtown	(404) 232-2198
*	Bancroft Industries	Lawrence	(415) 340-6500
	Barra	HQ	(510) 567-1200
	Beltway Dataprocessing Services, Inc.	Germany	
	Berkeley Asset Management	Berkeley	(510) 524-1000
*	Berkeley Process Control, Inc.	CA	(510) 234-1780

New	Delete	Copy	Cancel	Synonyms	Parker Dist - HQ	Main Phon
Account	A. K. Parker Distrib	Site	HQ-Distribu	Account Type	Commercial	Main Fa
Address	1000 Industrial Way			Account Team	CCONWAY	Sta
City	Menlo Park	State	CA	Territories		Current Volu
Zip	94025	Country	USA	Industries	manufacturing indu	Total Poten

Figure 17. List-Form View Type

Master-Detail View Type

Another common type of view shows a form applet at the top and a related list applet below. The two are related in that the records of the list applet are “children” of the “parent” record in the form.

An example of this parent-child, or master-detail, relationship is the Account Contacts view (the Contacts view in the Accounts screen).

The form applet gives information about a single account (in this case a company).

The list applet shows all the contacts associated with that account, such as all the company's employees who are prospects.

Any new record you add to this list applet will automatically be associated with the above account.

The screenshot shows the 'Account' form at the top and the 'Contacts' list below. The form includes fields for Account, Site, Address, City, State, Zip, Country, Synonyms, Account Type, Account Team, Territories, and Industries. The contacts list has columns for Last Name, First Name, MI, Mr/Ms, and Work Phone.

Last Name	First Name	MI	Mr/Ms	Work Phone
Granter	Stan	A	Mr.	(415) 329-6711
Grant	Susan	A	Ms.	(415) 329-5555
Jones	Fred	N	Mr.	(415) 329-1000
Kim	Henry	M	Mr.	(415) 321-0235
Navas	Javier	R	Mr.	(415) 329-6589
Petersen	Nancy	R	Ms.	(415) 329-1005
Smith	Alan		Mr.	(415) 322-2223
Smith	Brian		Mr.	(415) 329-6500
Threlfall	Mike		Mr.	(415) 329-6500
Trin	Tracy		Ms.	(415) 329-6875
Voldson	Bruce		Mr.	(415) 329-6541

Figure 18. Master-Detail View Type

Only contacts associated with the account are listed in this view. The underlying database can contain many more contacts, such as those associated with other accounts. But you would not be able to see them all at once unless you looked in another view, such as My Contacts (which shows the contacts for all your accounts).

Switching Between Applets in a View

When you're looking at a particular view, you sometimes want to switch from one applet in the view to another. For example, when you want to create a new record in the bottom applet, it's important that the bottom applet be active before you create the new record. (Otherwise, if the top applet is active, the record will be created in the top applet.)

The dark-blue tab and outline show that this applet is active.

To add a new Contact record, first make the Contacts applet active by clicking anywhere in this applet.

Last Name	First Name	MI	Mr/Ms	Work Phone	Work
Graner	Stan	A	Mr.	(415) 329-6711	(415)
Grant	Suzan	A	Ms.	(415) 329-5555	(415)
Jones	Fred	N	Mr.	(415) 329-1000	(415)
Kim	Henry	M	Mr.	(415) 321-0235	(415)
Navas	Javier	R	Mr.	(415) 329-6589	(415)
Peterson	Nancy	R	Ms.	(415) 329-1005	(415)
Smith	Alan		Mr.	(415) 322-2223	(415)
Smith	Brian		Mr.	(415) 329-6500	(415)
Threlfall	Mike		Mr.	(415) 329-6500	(415)
Trin	Tracy		Ms.	(415) 329-6875	(415)
Voldson	Bruce		Mr.	(415) 329-6541	(415)

Figure 19. Switching Between Applets

Pressing CTRL + TAB also switches to another applet.

NOTE: Don't worry if you mistakenly add a new record to the wrong applet. Just choose Undo Record from the Edit menu to start over.

Working with List Applets

A list applet, as you've seen, is a group of records presented as a list of rows. A list applet is useful for seeing multiple records at one time. For example, when you perform a query that yields 10 matching records, a list applet enables you to see all 10 records at once.

Besides viewing information, you can use a list applet to perform queries and to update fields—just as with a form applet.

Changing Column Order and Appearance

To make the records in a list applet easier for you to work with, you can change the order of the columns, resize the columns to see more or less of a particular field, and change the records' sort order.

To move a column ahead of another, drag the column header to the left until you see a red line, then drop the column.

To resize a column, drag the right edge of the column header.

New	Account	Site	Main Phone Number	Main Fax Number	URL
>	A. K. Parker Distribution	HQ-Distribution	(415) 329-6500	(415) 329-6511	www.parker.com
	A. K. Parker Distribution	US	(415) 329-6500	(415) 329-6511	
	A. K. Parker Inc.	HQ-Corporate	(415) 329-6500	(415) 329-6511	
*	AMCO Pipe & Line, Co.	San Rafael	(415) 491-2300	(415) 491-2310	
	AMW	München			
	Acma Inc.	HQ	(510) 245-3000	(510) 245-6000	
*	Andercote Consulting	Palo Alto	(415) 389-5400	(415) 389-5467	
*	Andronico's	Berkeley	(510) 568-1200	(510) 568-1220	
*	Apex Graphics Inc	SL-Walnutport-035639298	(610) 555-0000		
*	BG Edwards & Sons, Inc	HQ	(212) 489-1500	(212) 489-1568	www.aqedwards.com
*	BG Edwards & Sons, Inc	Los Angeles	(213) 486-8900	(213) 486-8989	www.bqedwards.com
*	BG Edwards & Sons, Inc	Palo Alto	(415) 326-5010	(415) 326-5011	
*	BG Edwards & Sons, Inc	San Francisco	(415) 742-4500	(415) 742-4550	
*	Ball Systems	Downtown	(404) 232-2198	(404) 232-4390	

Figure 20. Changing the Appearance of Lists

NOTE: If you want to rearrange several columns, or if the columns you want to rearrange are far apart, you may find it easier to use the Columns Displayed dialog box. To bring up this dialog box, right-click inside the list applet and choose Columns Displayed from the shortcut menu that appears.

Changing the Sort Order

You can sort the records in a list by any column. For example, you can sort a list of contacts so they appear alphabetically by name (the Name column) or chronologically by date (the Date column).

Click anywhere in the column you want to sort by. For example, to sort by account name, click the Account column.

Then click one of the Sort buttons to sort from A to Z or from Z to A.

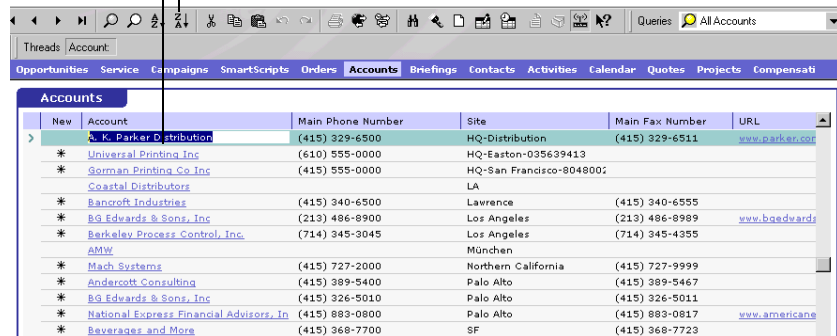


Figure 21. Changing the Sort Order

When you click a column to select it, be sure to click outside the hyperlink. Clicking the hyperlink takes you to another view, as explained in the next section.

NOTE: If you want to specify more than one column on which to sort (for example, Name and Site), use the Sort Order dialog box, just as you would in Microsoft Excel. To bring up this dialog box, right-click inside the list applet and choose Sort Order from the shortcut menu that appears.

Drilling Down for More Details

In some list applets, the fields in one or more columns appear as hyperlinks (underlined and in color). You can click a hyperlink to go to another view that has more detailed information about the item.

Click the hyperlink to drill down to more information about this contact.

Account

Account	A. K. Parker Distrib	Site	HQ-Distribut	Synonyms	Parker Dist - HQ	Main Phone #	(415) 329-6500
Address	1000 Industrial Way			Account Type	Commercial	Main Fax #	(415) 329-6511
City	Menlo Park	State	CA	Account Team	VSILVER	Status	Active
Zip	94025	Country	USA	Territories		URL	www.parker.com
		Industries	manufacturing indu				

Contacts

Last Name	First Name	MI	Mr/Ms	Work Phone	Work Fax
Ganer	Stan	A	Mr.	(415) 329-6711	(415) 329-6700
Grant	Susan	A	Ms.	(415) 329-5555	(415) 329-1100
Jones	Fred	N	Mr.	(415) 329-1000	(415) 329-1001
Kim	Henry	M	Mr.	(415) 321-0235	(415) 321-6700

The view that appears contains more information about this contact—including the activities associated with the contact.

Contact

Last Name	Jones	First Name	Fred	MI	N	Account	A. K. Parker Distribut	Site	HQ-Distribution
Job Title	Vice President	Mr/Ms	Mr.			Address	1000 Industrial Way		
Work #	(415) 329-1000	Home #			City	Menlo Park	State	CA	
Fax #	(415) 329-1001	Cellular #			Zip	94025	Country	USA	
Assistant			Asst. #			Email			

Activities

New	Activity Type	Description	Due	Assigned To	Start Time	Alarm
>	* Meeting	Have meeting to refocus expectations	05/30/1999	PLEWIS	12:30 PM	
	* Demonstration	Demonstration of possible solution	05/03/1999	SREILLY		
	* Call	Call our own IT dept for advice	05/02/1999	COHEN		

Figure 22. Drilling Down on a Hyperlink

Working with Form Applets

As you've seen, you can do many things using a list applet: perform queries, view information, and update information. But sometimes it's easier to do these things when the data is arranged in a form-like layout. This is why the form-list view type is so common in Siebel applications. Having the two types of applet in one view enables you to go easily back and forth between the two representations of the data, depending on what's more convenient for you at the moment.

Entering Data

Form applets are particularly handy for entering data (though you can also enter data in a list applet). Because the whole applet area is available for just a single record, a form applet can display more of a record's fields without requiring you to scroll—and can often show more text in a long field than a list applet can.

A field that appears gray when you click it (and does not have a button next to it) is read-only. You cannot change data in this field.

To enter data, just click inside a field and start typing.

To enter data in a field with a button next to it, click the button.

New				Delete		Copy		Cancel	
Account	Gottlieb Mar	Site	Mid-west	Opportunity	Four For One	Revenue	\$12,500.00	Prob %	0%
Address	386 North York Road	Description		Close Date	3/19/99	Created	2/19/96	Committed	<input type="checkbox"/>
City	Elmhurst	Sales Team	CCONWAY	Lead Quality		Sales Stage	01 - Prospecting	Source	April 97 Desktop Mailing
Zip	60126	Territory		Reason					
		State	IL						
		Country	USA						

Figure 23. Entering Data

NOTE: Like editable fields, read-only fields can appear in list applets, as well.

The following two sections describe the two special types of fields that can be edited only by clicking the button next to them.

Using Picklists

Some fields have a small triangle button next to them. Clicking this button displays a list of possible values for this field.

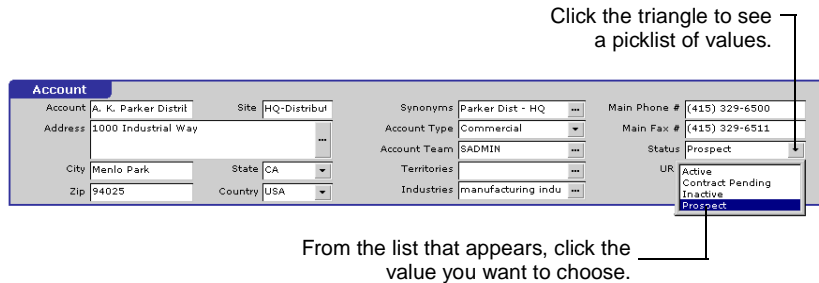


Figure 24. Using Picklists

Picklists make it faster for you to enter information and ensure that the values you enter are valid.

Picklists can appear in list applets, as well, but you won't see a triangle until you click inside the field you want to change.

Using Multi-Value Groups and Seeing More Information

Sometimes, a single field can contain multiple values at once. For example, an account often has more than one address. Similarly, the Account Team field contains the usernames of all the team members. A field that contains more than one value is called a *multi-value group*, or *MVG*.

A field in a form can display only one value at a time; therefore, to see the other values in a multi-value group, you must bring up the MVG applet, which you do by clicking the ellipsis button (...).

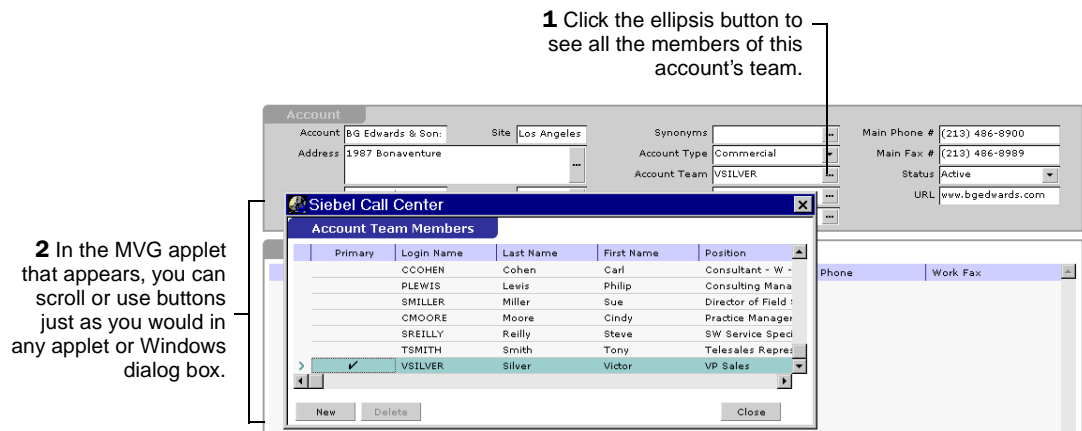


Figure 25. Using the Ellipsis Button to Bring Up an MVG

MVGs, like picklists, can appear in list applets as well as in form applets.

NOTE: An ellipsis button does not always mean that the information not displayed is part of an MVG. Sometimes, clicking the ellipsis button simply brings up a long text field.

Message Bar and Status Bar

At the very bottom of the application window are two bars that display information, as shown in [Figure 26](#).

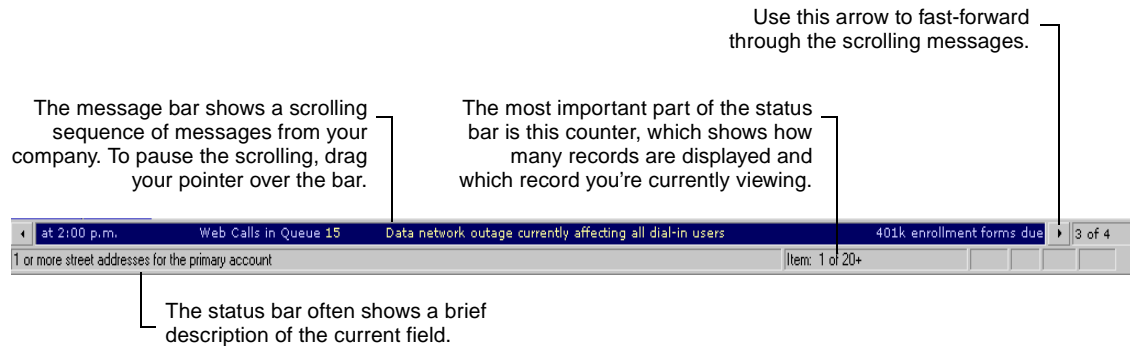


Figure 26. Message Bar and Status Bar

Setting Optional Preferences

As you learned earlier, many aspects of your application can be customized. You can set many preferences yourself by using the Options dialog box, shown in Figure 27.

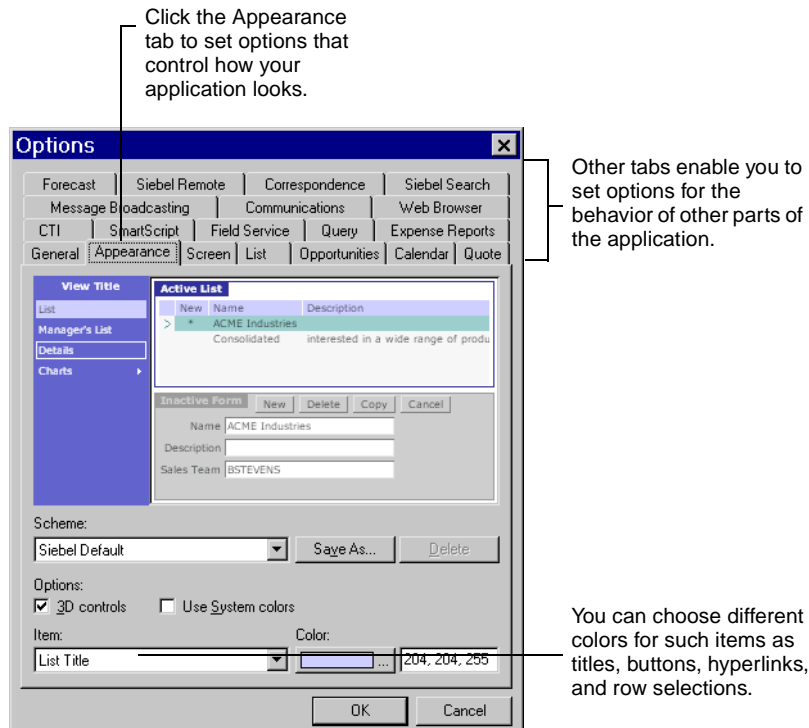


Figure 27. Options Dialog Box

To bring up the Options dialog box, choose Options from the View menu.

