SIEBEL CALL CENTER USER GUIDE

MIDMARKET EDITION

***e*BUSINESS APPLICATIONS**

VERSION 7.0

12PA1-CC00-07000

OCTOBER 2001

Contents

Chapter 4. Service Requests

Chapter 5. Solutions and Resolution Searching

Chapter 6. Activities

Chapter 7. RMA’s and Service Orders

Chapter 8. Quality and Change Requests

Chapter 9. eMail Response

Chapter 10. Campaigns and SmartScripts

Chapter 11. Opportunities

Appendix A. Views

Index

Introduction

Additional Documentation

The product documentation set for Siebel eBusiness Applications is provided on the *Bookshelf, MidMarket Edition* CD-ROM. For general information about Siebel product documentation, see the *Bookshelf* home page or the *Documentation Roadmap, MidMarket Edition*.

Siebel Systems, Inc., reserves the right to modify the documentation for Siebel eBusiness Applications at any time. For updates to Siebel documentation, go to the SupportWeb site (http://ebusiness.siebel.com/supportweb/).

If you want to order additional Siebel documentation and copies of the *Bookshelf* CD-ROM, go to Books Online at http://ebusiness.siebel.com/booksonline.

To access both SupportWeb and Books Online, you will need to provide the user name and password you received from Siebel Support Services (support@siebel.com).

NOTE: All Siebel MidMarket product names include the phrase MidMarket Edition to distinguish this product from other Siebel eBusiness Applications. However, in the interest of brevity, after the first mention of a MidMarket product in this document, the product name will be given in abbreviated form. For example, after Siebel Call Center, MidMarket Edition, has been mentioned once, it will be referred to simply as Siebel Call Center. Such reference to a product using an abbreviated form should be understood as a specific reference to the associated Siebel MidMarket Edition product, and not any other Siebel Systems offering. When contacting Siebel Systems for technical support, sales, or other issues, note the full name of the product to ensure its proper identification and handling.

What's New in This Release

For a list of features new in this release, see the "What's New" books included on the *Bookshelf* CD-ROM. Your Siebel implementation may not have all the features described in those guides, depending on which software modules you have purchased.

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

Siebel Systems Welcomes Your Comments

To help us improve our products, we want to know about any corrections or clarifications to this guide that you would find useful. Please include in your message:

- The title and version of the guide (very important)
- The name and version number of the Siebel eBusiness Application you are using
- Your name, job title or functional area, company name, phone number, and email address

Contact us through regular mail or email at:

Siebel Systems, Inc.
Technical Publications Department
2207 Bridgepointe Parkway
San Mateo, CA 94404-5009

doc@siebel.com

We appreciate your feedback.

Overview 1

Call Center and Support Organization

A typical sales and support organization is built around maximizing profits while providing first-class service to its customers. Each organization defines its own roles and corresponding tasks to achieve its goals. Usually, an organization's objectives are to increase sales, provide superior customer service, generate customer loyalty, and increase revenue by improving the selling process.

Call center and customer support software allows sales, telesales, and customer service representatives to better understand their customers' needs and to address those needs rapidly and professionally through up-to-the-minute customer information, deep product knowledge, and flexible resolution tools.

Siebel Call Center allows agents to handle service, support, and sales interactions across a broad range of communication channels such as telephone, email, fax, and page. These channels are integrated, allowing each agent to become a customer-contact manager, supporting a range of products and services and presenting tailored offerings designed to meet customers needs.

Siebel Call Center provides a very broad array of service and telesales functionality in a single application, so support personnel can provide both sales and service assistance to customers across multiple channels within their contact centers. Siebel Call Center manages customer and account profiles, product knowledge, purchase histories, opportunities, service requests, and service level agreements, so agents can focus on satisfying customer needs.

Home Page Overview

When agents log into the Siebel application, the first screen they see is the home page. The home page is a combination of lists and forms that provide a snapshot of the most important information they need to manage their day. This information is customizable, depending on each agent's daily activities and may include content such as My Calendar, My Activities, My Service Requests, My Campaigns, and My Contacts.

Agents can change the appearance of the home page based on their personal preferences, by using the controls that appear in the upper right corner of each list or form to show or hide the detailed records for each content area. They can also use the edit layout function to control what content appears on the home page and the order in which it appears. The changes they make stay in effect until they make new changes.

NOTE: The home page displays only the views for which an agent has privileges based on his or her profile.

For more information about how to edit the layout of the home page, see *Fundamentals, MidMarket Edition*.

Figure 1-1. Home Page

Communications Toolbar

The communications toolbar allows agents to manage their inbound and outbound voice interactions via the Siebel application. Through the communications toolbar, agents can initiate outbound phone calls and accept inbound phone calls.

In addition, agents can place calls on hold or transfer calls to other agents using either blind transfer, consultative transfer or conference transfer capabilities. Agents can also log into or out of the call queue and set their work mode to ready state to accept incoming phone calls. The toolbar lets agents manage multiple simultaneous phone calls.

When a phone call comes into the queue, the Accept Incoming Work Item icon blinks with the phone symbol. The timer on the left side of the toolbar tracks the handling time for the currently active call.

Figure 1-2. Communications Toolbar

Customer Dashboard Overview

The customer dashboard gives agents quick access to key customer data that can include the contact name, email address, account, site information, customer time zone, phone number, and interaction history throughout the lifecycle of a call. This is critical as it gives them a persistent region of the page containing the key contact data as they navigate through the application. The information displayed may be populated through the communications toolbar, SmartScript, or manually through the Search Center using the Set Dashboard button on a contact record. It also provides quick navigation to the areas of the application that are relevant to your needs including agreements, campaigns, activities, activity plans, service requests, and opportunities.

NOTE: The dashboard is read-only and will only populate customer information when it is in the open state. The dashboard toolbar button opens the dashboard. If the dashboard is open when you log out of the application, then it will remain open the next time you log back into the application.

As a good business practice, agents should always open the customer dashboard before answering calls, so that the customer information will be available for their referral, provided the organization uses the Siebel Communication Server and it is configured to populate the dashboard.

Figure 1-3. Customer Dashboard

Using Quick Navigation

When opened, the dashboard takes up the upper frame of the application area. It can be set with contact information from the communication server in an inbound or outbound call from SmartScript or manually from the Search Center. The quick navigation feature takes you to the Contacts screen and displays the customer’s information in the dashboard with the appropriate detail view, such as service request. It allows the agent to quickly navigate to the customer’s information based on the current customer context.

Search Center

Siebel *Search Center* is a text retrieval tool that lets agents search for information and see the results without losing the data currently shown in the application window. Search Center is the central search hub for call center agents. They can perform broad or exact searches from anywhere within the Siebel application.

Using the Results list in the Search Center, they can attach records to the main record that is active in the application window. For example, they can attach a solution record to a service request. They can also preview a result record or make a result record the active record in the application window. Selecting advanced search allows searching across multiple types of information with one search.

Performing a Search

Agents can perform searches to promptly find information, (for example, to search for a relevant solution record), and see the results without losing data.

To open the Search Center, on the application toolbar, click the Search button. The Search button is the binocular icon located in the right-hand part of the screen.

To perform a search

1. Click the Search button.

   The Search Center appears in a frame in the right part of the application window.

2. From the Look In drop-down list, select the type of information you want to find.

   Different fields appear depending on the selection you make in the Look In drop-down list.

3. Complete the fields to define your search criteria.

4. Click Search.

   The records that match the search criteria are displayed in the Results list.

Working with Result Records

Using the Results list in the Search Center, agents can attach records to the main record that is active in the application window, preview records or external documents, or search for a contact and populate the dashboard. For example, they can attach a solution record to a service request.

NOTE: In order for the selected record to attach to the main record, the relationship must be set up in Siebel Tools.

To attach a result record

1. In the application window, display the record to which you want to attach the result record.
2. Click the Search button and perform a search to find the record to attach.

   The records that match your search criteria appear in the Results list.
3. In the Results list, select the record to attach.
4. Click the menu button, and then click Attach.

   The record is attached to the active record in the application window.

Accounts 2

Accounts Overview

An account is a company representing a customer or a prospective customer. Use the Accounts screen and its associated views during inbound calls.

Use the Accounts screen to organize and track data during the following events:

- Creating accounts
- Creating and associating activities to an account
- Associating contacts to an account
- Looking up account information
  - Service Requests
  - Contractual Agreements
  - Activity History

Business Scenario

The Accounts screen and views often provide the central navigation point to help you research customers and respond to inbound calls. The type of call will help determine where you navigate to in the application. Some examples of how you would use the Accounts screen are:

You need to see existing account information including the products owned by the account to assist a caller with a service request or to follow up on a service request.

A caller contacts the call center in response to a sales campaign. Assuming the caller is unknown, you might create an new account. You record the account name, address, and other important information. You may then proceed to add a contact or other related information into the new account.

You may need to enter prospective account information. For example, you may be calling to see if a prospective customer found information on your Web site useful and whether that customer needed any additional information. You may add notes that could be used by a sales representative or schedule follow up activities to help manage the account relationship.

Creating an Account

As a central object for managing customer relationships, an account record must be created for each prospective or customer account before other supporting information can be entered about the account. Once created, an agent can begin to add and track important details such as individual contacts, opportunities, and service requests.

To create an account

1. Navigate to the Accounts screen.
2. From the Show drop-down list, select My Accounts.
3. In the Accounts list, click the menu button, and then click New Record.
4. In the new row, complete the necessary fields.
5. Click the menu button, and then click Save Record.

NOTE: You can use the More Info form to supply any additional account information if necessary.

Adding Contacts to an Account

As agents work closely with a prospective or customer account, accurately maintaining the contacts associated with the account becomes important.

To add contacts to an account

1. Navigate to the Accounts screen.
2. From the Show drop-down list, select My Accounts.
3. In the Accounts list, select the account to which the contacts will be added.
4. Click the Contacts view tab.
5. In the Contacts list, click the menu button, and then click New Record.
6. In the Add Contacts dialog box, select the contact, and then click OK.

   NOTE: If the Contact does not appear in the dialog box, you can add a new contact by clicking the New button, adding the information, and then saving the record.

   ---

7. In the Contacts list, click the menu button, and then click Save Record.

Contacts 3

Contacts Overview

Contacts are individuals with whom your company does business or with whom you expect to do business in the future. The Contacts screen is one of the primary places where agents will work when receiving inbound customer calls.

These tasks can be performed using the Contacts screen:

- Verifying that a contact is an existing customer
- Managing contacts associated with a company
- Viewing information on a contact relationship
- Creating activities regarding a contact
- Looking up previous activity or service history for a contact

Business Scenario

The Contacts screen and related views help you to manage your day. For example, customers may telephone a call center to place a service request for a product. You can use the Contacts screen and related views to assist the customer in a timely manner.

You will typically follow these basic steps when a customer calls with a service request:

- Verify the caller
- Profile the caller
- Provide the needed service
- Record any activity to the caller’s account
- Perform any follow or wrap-up tasks if necessary

Verifying a Contact

When receiving an inbound call, the first step is typically to verify and locate the caller using the Contacts screen or the Search Center, if the screen has not populated automatically. To verify the caller, perform a query in the Last and First Name fields. If the customer is in the system, you can verify the additional contact information, such as account name and address. If you do not find the contact information already in the system, you can add the contact information.

To find a contact using the Search Center

1. Click the Search Button.

   The Search Center appears in a frame in the right part of the application window.

2. From the Look In drop-down list, select Contacts.

   The Last Name, First Name, and CSN fields appear.

   NOTE: Your administrator may configure the search fields differently according to your company's requirements or needs.

   ---

3. Complete the fields to define your search.

   NOTE: You can use Boolean operators and keywords that are not case-sensitive.

   ---

4. Click Search.

The records that match your search appear in the Results list. You may also set the dashboard with the contact's information by clicking the Set Dashboard button in the Search window.

To create a new contact

1. Navigate to the Contacts screen.
2. From the Show drop-down list, select My Contacts.
3. In the Contacts list, click the menu button, and then click New Record.
4. In the new row, complete the necessary fields.
5. Click the menu button, and then click Save Record.

NOTE: If an account has not been established for the contact, click the Accounts view tab to enter the account information in to the system.

Profiling a Contact

After verifying the caller's information, agents typically complete a customer profile. Profiling a contact is the process where they gather additional information about the contact and the specific business or service requirement concerning the contact.

Profile View

Agents have several choices when gathering customer profile information. The information can be entered into specific fields. It is also possible to create a service request or perform another activity, such as a SmartScript, before leaving the Contacts screen.

To add profile information

1. Navigate to the Contacts screen.
2. From the Show drop-down list, select My Contacts.
3. In the Contacts list, select the contact to profile.
4. Click the Profile view tab.
5. In the Profile form, complete the necessary fields.
6. Click the menu button, and then click Save Record.

NOTE: The Contacts screen is where you may also perform other functions, such as creating a service request or adding activities to a contact's information.

Service Requests

The Service Requests view associated with the Contacts screen can be used to view existing service requests or add new ones. An agent can check to see if a customer has an existing service request related to the current issue by using the Search Center or the Contacts screen, Service Request view and performing a query on the information.

To create a service request

1. Navigate to the Contacts screen.
2. From the Show drop-down list, select My Contacts.
3. In the Contacts list, locate the customer you are speaking with.
4. Click the Service Requests view tab.
5. In the Service Requests list, click the menu button and then click New Record.
6. In the Service Requests list, complete the necessary fields.
7. Click the menu button, and then click Save Record.

Entering Call Activities

After completing a call, agents will often create an activity that will prompt a follow-up task with the customer.

NOTE: An activity is a task or event that is performed for a contact.

To add an activity to a contact

1. Navigate to the Contacts screen.
2. From the Show drop-down list, select My Contacts.
3. In the Contacts list, select the contact to which the activity will be added.
4. Click the Activities view tab.
5. In the Activities list, click the menu button, and then click New Record.
6. In the new row, complete the necessary fields.
7. Click the menu button, and then click Save Record.

Service Requests 4

Service Request Overview

A service request is a customer request for information about or assistance with products or services bought from a company. Service request records track customer requests and accompanying responses and are the central data object for managing potentially complex service issues to rapid, consistent, and correct resolution.

Service Requests permit agents to create, assign, and manage customer service issues. They provide access to the customer’s assets, profile, open issues, related product issues, and service agreement information. Each Service Request can include short and extended descriptions of the problem, problem categories, levels of severity and priority, and status tracking with the opening and closing date and time. Each service request can also include many important details such as related activities, related attachments, and relevant solutions.

Use the Service Requests screen to perform the following activities:

- View assigned service requests
- Create and update service requests
- Enter information about activities related to a service request
- Associate and view information related to a service request, including:
  - Attachments
  - Solutions
  - Service Requests
- Log Change Requests associated with a service request
- Conduct customer satisfaction surveys associated with a service request
- Create and view status of service orders
- View audit trail information for a service request
- View graphical analysis charts of summary service request information

Service Request Workflow

The tasks to process a service request are typically performed by call center agents or customer service representatives.

This is an example of a typical service request workflow.

1. **Receive Incoming Call**. A customer calls to report that he or she is having a problem with your product or service.
2. **Receive and Open Request.** The agent opens a service request, enters or verifies customer and product information, and records a description of the problem.
3. **Verify Service Level and Enter Details.** The agent then checks to see if the customer has a service agreement entitling him or her to the level of service needed for the problem. The agent verifies that the agreement has not expired, that the customer has not reached his or her quota, and the person on the phone is an approved contact. If the customer does not have the appropriate level of service the agent cancels the service request and routes the call to the appropriate department.
4. **Assign the Request.** When an agent is unable to resolve the problem over the phone, that agent can route the service request to other agents who have more expertise.

Business Scenario

A customer calls to report that she is having problems installing the software that she purchased from your organization. You open a new service request, enter the customer and product information, and record the customer’s description of the problem. The application associates key information with the service request, which gives the representative access to the customer’s profile.

Next, you check to see if the customer has a service agreement entitling her to the level of service needed to fix this request. Upon doing this, you verify that the entitlement has not expired, the customer has not reached her quota, and the person on the phone is an approved contact. Once verified, the committed response time is automatically calculated and displayed in the service request.

If you are able to quickly resolve the customer’s problem, you can walk the customer through the solution right over the phone. The customer verifies that the solution was successful. To follow up, you can send the customer a technical description of the problem for future reference.

If you are unable to resolve the problem right away, you can transfer or route the service request to other agents who have more expertise.

Managing Service Requests

Service requests vary in difficulty, type of resolution, and impact on the organization. The typical service request cycle involves initiating a service request, resolving the customer service issue, and then tracking and analyzing the requests for process improvements.

Customer Requests

Depending on how an organization is structured, agents can receive a service request through many different channels. These channels may include:

- Direct telephone calls, often routed to the agent through an Automated Call Distributor (ACD)
- Email requests
- Internet requests logged automatically by customers over the Internet

Initiating a Service Request

When opening a new request, certain information is typically necessary to begin processing the request, including:

- Customer name
- Company name
- Nature of the request
- Product or Asset name

Based on the information gathered from the customer, you can then determine how to proceed with processing the request.

Identifying the Customer

When a customer telephones a call or service center, the agent must verify if the person 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.

At that point, if the customer exists in the system, the agent can review which requests have already been entered for this customer. If the customer did not already exist in the system, the agent can add the customer as well.

NOTE: For customers 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.

Creating a New Service Request

For new service issues, it will be necessary to enter a service request directly from the Service screen.

To create a service request

1. Navigate to the Service screen.
2. From the Show drop-down list, select All Service Requests.
3. In the Service Requests list, click the menu button, and then click New Record.
4. In the Service Requests list, complete the necessary fields.
5. Click the menu button, and then click Save Record.

Verifying Entitlements

Agents can check to see if a customer is entitled to service by viewing the Service screen, More Info view and clicking the Verify button, after which the Pick Entitlements dialog box appears.

If nothing appears in the Entitlements list, it could mean one of two things:

The customer has not contracted to receive support

The customer has used the allotted entitlements

If there are entitlements listed in the dialog box, select an entitlement and click OK.

NOTE: The Entitlements screen and view are read-only. To input information, use the Agreements screen. For more information on agreements and entitlements see *Applications Administration Guide, MidMarket Edition*.

Providing Service Request Details

After an agent has confirmed the customer's entitlements and initiated a service request, he or she must enter the details so the service request can be processed and the issues resolved.

To supply details to an open service request

1. Navigate to the Service screen.
2. From the Show drop-down list, select All Service Requests.
3. In the Service Requests list, select and drill down on the SR # hyperlink of the service request.

   NOTE: If you have already verified the customers entitlement, you should already be on the service request and therefore do not have to follow Steps 1 through 3.

4. In the Service Requests form, complete the necessary fields.
5. Click the menu button, and then click Save Record.

NOTE: The Siebel application is configured to prevent users from deleting service requests to protect historical data.

Assigning the Service Request

A service request is assigned to an agent after the details have been entered, and it has been determined that the issue cannot be resolved by the receiving agent.

Manual Assignment Method

Service requests can be assigned to your colleagues with more capacity or expertise to resolve the particular service issue.

To assign a service request

1. Navigate to the Service screen.
2. From the Show drop-down list, select All Service Requests.
3. In the Service Requests list, select the service request to be assigned.
4. Click the More Info view tab.
5. In the Owner field, click the select button.
6. From the Pick Service Request Owner dialog box, select the person you want to assign the request to, and then click OK.
7. Click the menu button, and then click Save Record.

Associating Activities to a Service Request

After creating the service request and supplying the product information, an agent can associate follow up activities to the request that assist the customer and close the request in a timely manner.

To associate activities to a service request

1. Navigate to the Service screen.
2. From the Show drop-down list, select All Service Requests.
3. In the Service Requests list, select the service request to which the activities will be assigned.
4. Click the Activities view tab.
5. In the Activities list, click the menu button, and then click New Record.
6. In the Activities list, complete the necessary fields.
7. Click the menu button, and then click Save Record.

NOTE: Activities cannot be updated, and new activities cannot be appended to a closed service request.

Resolving a Service Request

Often an agent will be able to resolve an open service request based on solutions that exist in the system. In this case, the appropriate solution is attached to the service request for reference and is used by other agents in resolving similar service issues in the future. For more information, refer to Chapter 5, “Solutions and Resolution Searching.”

Closing a Service Request

After an agent has added the solution to the service request, he or she may close the request. This indicates to others that the problem has been resolved.

To close a service request

1. Navigate to the Service screen.
2. From the Show drop-down list, select My Service Requests.
3. In the Service Requests list, select the service request you would like to close.
4. In the Status drop-down list, select Closed.
5. Click the menu button, and then click Save Record.

NOTE: When selecting Closed, the system automatically sets the Sub Status field to Resolved and populates the current date and time in the Closed field.

Solutions and Resolution Searching 5

Solutions Overview

After entering details of a service request and assigning it to a customer service representative, agents will typically want to research a solution to the problem.

Solutions are answers to questions or service issues encountered by the customer. Your company wants to keep track of these answers so that they are available the next time someone asks the same or similar question.

The Solutions screen allows agents to store, organize, associate, and search items in the knowledge base for resolutions successfully used for similar problems and for published solutions to potential problems.

After resolving the problem successfully, they can associate the solution with the service request for reference. Any associated solution can be made available to customers who check the status of their service issues either through the call center or through a self-service eService site. In addition, these relevant solutions help improve productivity by acting as a best practice guide the next time an agent needs to solve the same or similar service issue. Associating the solution also makes it possible to resolve similar service requests without doing extensive research.

Business Scenario

You can resolve a service request either by looking up Related SRs or by using the Search Center to find relevant resolution documents such as white papers, articles, or technical documentation. Upon locating an appropriate resolution document, you can preview the information by launching your application. Once you have selected the appropriate document, you can associate the document to the current service request as an attachment by clicking the Attach button in the Search Center. The next time you encounter a similar service issue, the resolution document will be available to help with the resolution process.

Searching for Solutions

The first step in finding a solution to a service request is to determine if a solution already exists for this or a similar problem.

This can also be done from the Service Request screen by searching for and adding a solution in the Service Request screen, Solution view and then performing a query to locate the correct solution.

To manually search for a solution from the Solution screen

1. Navigate to the Solutions screen.
2. From the Show drop-down list, select All Solutions.
3. In the Solutions list, click the menu button, and then click New Query.
4. Define your query criteria by completing the fields in the row.
5. Click the menu button, and then click Run Query.

NOTE: Records that match your criteria appear in the Solutions list and are returned in order of relevance to your query criteria. Click the record navigation buttons to view each record in the result list.

Associating a Solution with a Service Request

After a solution has been found for a service request or a new solution created, you can relate the solution to the service request.

To relate a solution with a service request

1. Navigate to the Service screen.
2. From the Show drop-down list, select All Service Requests.
3. In the Service Requests list, select the service request to which the solution will be attached.
4. Click the Solutions view tab.
5. In the Solutions list, click the menu button, and then click New Record.
6. In the Add Solutions dialog box, query and select the solution, and then click Add.
7. In the Solutions list, click the menu button, and then click Save Record.

Using the Search Center

NOTE: An agent will want to make sure the service request being researched is an active record.

To search for a solution using the Search Center

1. Click the Search Center button.

   The Search Center appears in a frame in the right part of the application window.

2. From the Look In drop-down list, select the type of information you want to find.

   Different fields appear depending on the selection you make in the Look In drop-down list.

3. Complete the fields to define your search criteria.
4. Click Search.

   The records that match your search criteria appear in the Results list.

5. Select the relevant solution and then click Attach.

   The solution will be associated.

Adding Solutions

Once an agent has found the solution to a problem, he or she can add the solution to the database for others to use. If it is a new solution that does not exist in the solution knowledge base, the administrator can create and add the new solution.

To manually add a solution

1. Navigate to the Solutions screen.
2. From the Show drop-down list, select All Solutions.
3. In the Solutions list, click the menu button, and then click New Record.
4. In the Solutions list, complete the necessary fields.
5. Click the menu button, and then click Save Record.

NOTE: Agents must have the appropriate responsibility to enter solutions.

Service Activities

Once you have successfully resolved a service request, and before leaving the service request record, you will want to associate the research and work with the service request as activities. This information should be recorded against the service request in the Activities view. This keeps others from duplicating your efforts.

To add a activity to a service request

1. Navigate to the Service screen.
2. From the Show drop-down list, select My Service Requests.
3. In the Service Request list, click the SR # hyperlink.
4. In the Activities list, click the menu button, and then click New Record.
5. In the Activities list, complete the necessary fields.
6. Click the menu button, and then click Save Record.

NOTE: If your company has set up dedicated activity plans, you can choose to use the Activity Plans view instead of inputting individual activities. For more information on activities, refer to Chapter 6, “Activities.”

Adding Additional Activity Details

While working with a list of activities, agents can click the Activity Type hyperlink which will offer them greater details about the activity. The activity form that appears offers an easy-to-read format that contains details about the activity. The Attachment list offers access to external references or files related to the activity. These files can be copied into the Siebel application.

To add an attachment to an activity

1. Navigate to the Service screen.
2. From the Show drop-down list, select My Service Requests.
3. In the Service Requests list, select the service request.
4. Click the Activities view tab.
5. In the Activities list, click the Type hyperlink.
6. In the Attachments list, click the menu button, and then click New Record.
7. In the Attachments form, in the File field, click the Browse button.
8. In the Choose file dialog box, select the file and click Open.
9. In the Attachments form, click the menu button, and then click Save Record.

Activities 6

Activities Overview

It is important for an organization to accurately reflect the amount of work that was required to resolve a service request. This practice avoids duplicating efforts if other team members get involved in resolving the same problem. It also keeps everyone up-to-date on exactly which specific activities were taken and when they occurred when working with contacts and accounts. Activities with specified start times automatically appear on your activity and calendar screens.

Activities are tasks that are required or have been performed. In a customer service environment, activities are often associated with a service request and represent steps taken to resolve a customer issue. Activity templates are available representing predefined groups of sequential activities required to resolve or diagnose specific issues. These templates provide a quick method of creating consistent activity sequences representing best practices for addressing customer issues.

Activities are also used to represent tasks in nonservice situations such as scheduling and recording meetings, appointments, and interactions with customers and prospects.

Business Scenario

Call center and service departments use the Activities screen to manage personal tasks and tasks associated with contacts, service requests, solutions, accounts, and opportunities.

For example, upon reviewing your to-do list for the day, you notice that the first activity is to follow up on a faxed service request from your customer regarding a solution that company is looking for.

Because your team has been using activities to track the progress of this account, you are able to prepare for a follow-up phone call by reviewing past activities associated with your customer.

You notice that since the last phone call, a colleague has sent some literature which solves that company's problem. You prepare for the follow-up call based on this information. As team members accomplish their activities, they mark them as done, providing key status information about the relationship with them. Upon speaking with the customer you log an activity, record the details of your conversation with the customer, and then close the request.

Activity Process

As agents work with activities in resolving customer service issues, consider these suggestions:

- See if any work has already been performed to resolve this request
- Record new activities you have accomplished to help resolve the request
- If appropriate, use an existing activity plan to help you resolve the request using best practice sequences of resolution tasks
- Close activities as they are completed

Researching an Activity

For existing service requests, agents can quickly research the history of related activities through the Service screen. The Activities view provides a comprehensive set of completed and scheduled activities for the service request.

To view existing activities for a service request

1. Navigate to the Service screen.
2. From Show drop-down list, select My Service Requests.
3. In the Service Requests list, select the service request with which you want to work.
4. Click the Activities view tab.

   The Activities list appears.

   NOTE: This list represents every scheduled task for the selected service request as well as the service request history.

   ---

5. In the Activities list, click the Type hyperlink of the service request you would like to view.

   The Activity form and Attachments list appears.

   NOTE: You can view additional details about the activity, or add additional details such as supporting attachments in either the form or the list.

Adding an Activity

When working with a service request, it is critical to record all research and other work an agent has done to resolve the request. This comprehensive history can be crucial to others working with the particular service request, contact, or account. It also forms a valuable resolution record that may be used by others in the future to avoid duplication of effort.

Activities related to a service request are recorded on the Service screen.

To add activities to a service request

1. Navigate to the Service screen.
2. From the Show drop-down list, select My Service Requests.
3. In the Service Request list, select the service request to which the activities will be added.
4. Click the Activities view tab.
5. In the Activities list, click the menu button, and then click New Record.

   NOTE: An activity number will be generated by the system. The account and contact information are automatically populated from the information in the selected service request.

6. In the Activities form, complete the necessary fields.
7. Click the menu button, and then click Save Record.

Assigning an Activity

When creating a new activity, it may be necessary to assign it to another team member that handles specific requests or types of tasks. When the activity is assigned it appears in the assigned user's My Activities list.

To assign or reassign an activity

1. Navigate to the Service screen.
2. From the Show drop-down list, select All Service Requests.
3. In the Service Requests list, select the service request of the activity you want to assign.
4. Click the Activities view tab.
5. In the Activities list, select the activity you want the representative to be reassigned or assigned to, or create a new one.
6. In the Employees field, click the select button.
7. From the Employees dialog box, select an existing employee or add a new one.
8. Select the Primary field for the employee you want to assign the activity to, and then click OK.
9. In the Activities list, click the menu button, and then click Save Record.

RMA's and Service Orders 7

RMA and Service Orders Overview

Depending on the nature of your organization’s business, successful resolution of customer service issues may often require the creation of a service order or return merchandise authorization (RMA). When an item must be returned, your organization must authorize the return. The service order or RMA provides that authorization, and is the vehicle to initiate and manage the process by which the customer receives an appropriate replacement item, or refund.

The call center agent has immediate access to order handling information, down to the way they bill information for each shipment. They can enter and track RMA’s as well as Service Orders (SO’s) that do not necessarily require returned merchandise, but do require the ordering of specified service products or service packages as defined by their support organization.

Business Scenario

Situations often occur in which a customer contacts your organization needing to return an item that was purchased from your company.

There are several possible scenarios in which this may happen:

- The customer returns a part, and the part is fixed and returned to the customer.
- The customer returns a part, and the service department sends the customer a replacement part.

NOTE: In the above cases, you create a service order specifying the type of service transaction that is required as well as critical information regarding pricing and requested shipment dates, if necessary.

Processing a Return

If an item must be returned to be fixed or replaced to close the service request, you must authorize a return. That action allows the customer to receive a replacement item, refund, or have his or her item fixed.

To process an return order

1. Navigate to the Service screen.
2. From the Show drop-down list, select My Service Requests.
3. In the Service Requests list, select the service request that you want the return to be processed with.
4. Click the Orders view tab.
5. In the Orders list, click the menu button, and then click New Record.
6. In the Orders form, complete the necessary fields, including the Type field.

   NOTE: The Type field indicates what actions must be performed for this service transaction.

   ---

7. Click the menu button, and then click Save Record.

   NOTE: The Status field may default to Open. If so, change the status as necessary. The Site field is automatically completed when you select an account.

Generating an Order

When generating an order, each part number or individual service product is treated as a separate line item.

Adding Line Items

A new record must be created for each line item.

To add a line item to an order

1. Navigate to the Service screen.
2. From the Show drop-down list, select My Service Requests.
3. In the Service Requests list, select the service request to which the line item will be added.
4. Click the Orders view tab.
5. In the Orders list, click the Order # hyperlink of the order to which you wish to add.

   The Line Items list and Totals form appears.
6. In the Line Items list, click the menu button, and then click New Record.
7. In the Line Items list, complete the necessary fields.
8. Click the menu button, and then click Save Record.

NOTE: The Line # and Qty fields default to 1 and the Status field defaults to Open. Change as necessary.

Completing the Order

Agents must approve an RMA before it can be processed.

Approving an RMA

To approve an RMA, navigate to the Service screen and find the RMA/Service Order list.

To approve an RMA

1. Navigate to the Service screen.
2. From the Show drop-down list, select My Service Requests.
3. In the Service Requests list, select the service request.
4. Click the Orders view tab.
5. In the Orders list, select the order with which the RMA will be approved.
6. In the Orders list, in the Approved field, select the check box.

   NOTE: If the Approved field is not displayed, add it to the screen by clicking the menu button and selecting Columns Displayed.

7. Click the menu button, and then click Save Record.

   NOTE: If this item can be billed back to the customer, select the Billable check box.

Quality and Change Requests 8

Quality Overview

The Quality screen allows organizations to track change requests related to products, service requests, and solutions.

Service professionals can record change requests against a product or a specified component of a product allowing the organization to assess the quality of a product. Change management also drives the overall product quality improvement process by making it possible to prioritize problems, identify problem trends, correct defects during any stage of the product cycle, and estimate correction costs.

As part of the process for handling service requests, change management makes it possible to keep customers up-to-date about the status of defect corrections and schedules for replacement products.

Use the quality screen and corresponding views to:

- Create, manage, and maintain change request records
- Create and view the activities associated with a change request
- Keep customers informed about schedules for fixing and replacing defective products
- View change requests associated with service requests
- Create and view attachments associated with change requests
- View a comprehensive change request history for a product
- View charts to review important change request status information in a graphical format
- Create solutions and associate them with product change requests

Business Scenario

Tracking product quality is crucial to a service organization. This information can be used by others to help diagnose and resolve customer problems. In particular, if a product has a known defect, it is very important that this information be documented in a place that can be used and found by others.

When a customer calls with a problem, you can look up any related quality issues that may be contributing to the current customer needs, very often shortening the time spent researching and resolving the problem. If the resolution is not available, any activity to resolve the issue should be captured in the related activities. This change request and activity history can be used to keep your customer informed of the problem and resolution.

In addition to keeping the customer informed, it also helps keep your organization aware of possible problem areas. For example, if customers are calling with a common complaint about a product, the organization will know immediately that a problem exists and can implement a standard, best practice solution in a more timely manner.

Associating a Change Request with a Service Request

When a service request results from a documented product defect, associate this knowledge with the service request under review to help the organization judge the total impact the defect is having on customers.

To associate a change request with a service request

1. Navigate to the Service screen.
2. From the Show drop-down list, select My Service Requests.
3. In the Service Requests list, select the service request with which you want the defect to be associated.
4. Click the Change Requests view tab.
5. In the Change Requests list, click the menu button, and then click New Record.
6. In the Add Change Request dialog box, select the appropriate change request, and then click Add.
7. In the Change Requests list, you can update the Type, Status, and Severity fields.
8. Click the menu button, and then click Save Record.

Managing Changing Requests

There are several tasks associated with the Quality screen and Change Requests view. Like many other screens in the Siebel application, it is very important to consistently track the important information associated with a change request.

If you cannot find an existing change request related to the current issues, add a new change request to keep the system up-to-date with the most current information. Remember that a change request also helps others who use the system and resolve service requests.

Attachments and activities can be very effective to provide detailed information associated with a change request.

Adding a Change Request

When you cannot find an existing defect to associate with a service request, you can add a new change request to the system.

To add a new change request

1. Navigate to the Quality screen.
2. From the Show drop-down list, select My Change Requests.
3. In the Change Request list, click the menu button, and then click New Record.
4. In the new row, complete the necessary fields.
5. Click the menu button, and then click Save Record.

NOTE: The new change request is now available for association with service requests, as well as products and solutions.

Associating Activities with a Change Request

It is important to track the activities to resolve a change request. By tracking the status of a request, you can keep customers up-to-date and resolve the service request as soon as the product issue is corrected.

To associate activities with a change request

1. Navigate to the Quality screen.
2. From the Show drop-down list, select My Change Requests.
3. In the Change Request list, select the change request with which you wish to associate the activity.
4. Click the Activities view tab.
5. In the Activities list, click the menu button, and then click New Record.
6. In the Activities list, complete the necessary fields.
7. Click the menu button, and then click Save Record.

Associating Attachments with a Change Request

In researching and resolving a Change Request, an agent might find external reference material and related documents such as repair logs or email messages that they want to associate with the change request. Once again, this will keep the relevant information about a change request in one common place, making it easier to resolve a customer's problem.

To associate attachments with a change request

1. Navigate to the Quality screen.
2. From the Show drop-down list, select My Change Requests.
3. On the Change Request list, select the change request with which the attachment will be associated.
4. Click the Attachments view tab.
5. In the Attachments list, click the menu button, and then click New Record.
6. In the Attachments form, in the File field, click the Browse button.
7. In the Choose file dialog box, locate and select the file, and then click Open.

NOTE: If you want this document to be updated as changes are made to the original file, select the Update File check box.

---

8. Click the menu button, and then click Save Record.

eMail Response 9

eMail Response

Email has become a popular channel through which customers communicate their service needs to organizations. Siebel eMail Response prepares an agent to respond to high volumes of inbound email in an efficient, consistent, and professional manner. It routes inbound emails to the most appropriate agent based on the same business logic available for routing other types of customer communications. Agents can view their inbound email queues at a glance and then, for each message, they can instantly view related customer, account, service request and opportunity profiles, as well as any attachments. Templates are available for use in the solution knowledge base to compose customized replies to inbound emails.

Setting Spell Check Preferences

Siebel Spell Check can be used with the Siebel eMail Response application and the Send Email, Send Fax, and Send Page features.

Siebel Spell Check dictionaries are available in several languages. All language dictionaries are installed regardless of the default language selected during installation. You can change your Spell Check default language in User Preferences.

An agent can add their own words to a custom dictionary. Custom user dictionaries are stored on the server so you can use any available workstation and still have access to the entire dictionary.

Set the spell check options using the following instructions.

To change default spell check options

1. From the application-level menu, choose View > User Preferences.

   The Profiles view appears.

2. In the Show drop-down list, select Spelling.

3. In the Spelling form, make the necessary changes. See Table 9-1 on page 9-3 for options and descriptions.

4 In the Spelling form, click Save.

The changes take effect the next time an agent uses Spell Check.

Table 9-1. Spell Check Options and Descriptions

Spell Check Preference Field	Default	Description
Ignore UPPERCASE Words	Off	When off, Spell Check questions words in all caps, such as SMTP or CD and asks whether they are correct.
Ignore MixedCase Words	Off	When off, Spell Check questions words such as eMail and asks whether they are correct.
Ignore Internet Names	Off	When off, Spell Check questions words such as support@siebel.com and http://www.siebel.com/
Ignore HTML Tags	On	When on, Spell Check does not question hypertext code, such as <BOLD>Home</BOLD>.
Ignore Words with Digits	Off	When off, Spell Check does not questions words such as POP3.
Always Check Spelling Before Sending	Off	When off, Spell Check does not check the spelling of the email body when the agent clicks Send.
Report Capitalization Errors	On	When on, Spell Check questions errors such as PLEase.
Default Spell Checking Language	Installation language	The current default language dictionary used to check spelling. The initial default language is the language specified during Siebel Systems installation. Agents may change their default language at any time. A new default spell checking language will take effect the next time an agent invokes spell checking.

Replying to an Incoming Email

Agents will want to perform the following tasks when they are replying to an incoming email.

- Create a reply
- Find and insert a solution category and template
- Attach a file
- Attach literature
- Check the spelling and send the reply

To create a reply

1. Navigate to the Communications screen.
2. From the Show drop-down list, select My Communications.
3. In the Communications list, select the email to which you want to respond.
4. In the Communications list, click Reply.

   The Outgoing Messages form appears, the Incoming Messages form appears, and the Incoming Attachments list appears.

5. In the Outgoing Messages form, select the appropriate greeting from the drop-down list.

   The greeting text is inserted at the beginning of your reply.

6. In the Outgoing Messages form, select the appropriate category from the drop-down list.

   NOTE: Be sure to select the Category field before you select the Body field, so that you see the associated templates at the top of the list.

7. In the Outgoing Messages form, select the appropriate body template from the drop-down list.
8. In the Outgoing Messages form, select the appropriate closing from the drop-down list.

9. Click Spell Checking and correct any errors, and then click Done.
10. Click Send.

Adding Attachments and Literature

It may be helpful or necessary to attach a file to a response to assist the customer with his or her problem.

To add an attachment

1. In the Outgoing Messages from, click the Attachment button.
2. In the Attachments dialog box, select the attachment you wish to add.
3. If the file is not listed in the dialog box, click New.
4. In the File Name field, click the select button.
5. In the Add Attachment dialog box, click Browse.
6. In the Choose File dialog box, select the file, and then click Open.
7. In the Add Attachment dialog box, click Add.
8. In the Attachments dialog box, click Save, and then click Close.

   The attachment appears in the Attachments field.

To attach literature

1. In the Outgoing Messages from, click the Add Literature button.
2. In the Pick Literature dialog box, select the literature you wish to attach and then click OK.

Adding a Solution

Once you have resolved the customer’s inquiry, you may want to add the solution to the email. You will use the Search Center to accomplish this task.

To add a solution using the Search Center

1. Navigate to the Communications screen.
2. From the Show drop-down list, select My Communications.
3. In the Communications list, select the email to which you want to respond.
4. In the Communications list, click Reply.

   The Outgoing Messages form appears, the Incoming Messages form appears, and the Incoming Attachments list appears.
5. Click the Search Center button.
6. In the Look In drop-down list, select the template in which you wish to search.
7. In the Search Center form, complete the necessary fields, and then click Search.
8. Select the solution, and then click Attach.

   The solution is copied into the body of the email reply.

Associating Service Requests and Opportunities

Agents have the ability to associate a service request or an opportunity with an email.

To associate a service request

1. Navigate to the Communications screen.
2. From the Show drop-down list, select My Communications.
3. In the Communications list, select the email to which you want to respond.
4. In the Communications list, click Reply.

   The Outgoing Messages form appears, the Incoming Messages form appears, and the Incoming Attachments list appears.
5. In the Outgoing Messages form, in the SR # field, click the select button.
6. In the Pick Service Request dialog box, select the service request you wish to associate, and then click OK.

To associate an opportunity

1. Navigate to the Communications screen.
2. From the Show drop-down list, select My Communications.
3. In the Communications list, select the email to which you want to respond.
4. In the Communications list, click Reply.

   The Outgoing Messages form appears, the Incoming Messages form appears, and the Incoming Attachments list appears.
5. In the Outgoing Messages form, in the Opportunity field, click the select button.
6. In the Pick Opportunity dialog box, select the opportunity you wish to associate, and then click OK.

eMail Response

Campaigns and SmartScripts 10

Campaigns Overview

Campaigns provide a consistent method for implementing marketing campaigns and allow agents to view information about new and existing campaigns. Agents use the Campaigns screen and associated views when dealing with inbound phone calls from customers. As customers call in response to a campaign, agents must verify information about the customers, gather any additional information and determine whether any customers are possible opportunities. Agents can also use campaigns to make outbound calls for a marketing or sales campaign.

The goal of a campaign is to create an opportunity that ultimately results in a sale. Sales representatives are assigned opportunities from telesales representatives who have generated an opportunity from a campaign.

Campaigns work in conjunction with customer telephony integration to automatically call the customer on the list when executing an outbound campaign or to pop-up the appropriate campaign and customer information when taking inbound calls for a campaign.

Business Scenario

As part of an effort to increase visibility and generate more revenue from July through September, your company is conducting a campaign in the Western region to gather information from potential customers who have accessed your Web site. The goal of the campaign is to make sure potential customers can find the information they are looking for on your Web site.

The campaign begins with a listing of every person who clicked the More Information button on your Web site. You begin calling those potential customers to update the information, note the result of the call, and generate business leads for the sales department. These tasks are done by asking a series of questions.

Based on the answers given, you mark the potential customer’s record as information only, no interest, or promote to opportunity.

Conducting Campaigns

The Campaigns Overview view provides general information about a campaign. To display the Campaign Overview, click the Name hyperlink on the Campaigns screen. This view provides general information about a campaign that you can use while talking with a customer.

When making outbound calls as part of a campaign, an agent needs to follow several steps to identify, qualify, and develop leads.

One example of how a campaign might be conducted is the following:

1. The marketing department defines the campaign
2. The customer support representative selects a campaign
3. The customer support representative selects the next contact or prospect to call, initiates an outbound call using the CTI toolbar, and delivers messages about the campaign
4. If the contact is interested:
    - a. Yes: Generate an opportunity or response depending on the type of campaign

      Click the Create Response or the Create Opportunity button

      Gather the response or opportunity information and enter it into the appropriate fields

      Assign the opportunity to a sales representative

    - b. No: End call, update the call status to call completed and then update the outcome to no interest.

      Call the next customer

SmartScripts Campaigns

Campaigns are composed of preapproved offers which have a call guide and literature associated to them. Campaigns can be conducted using the SmartScripts feature. SmartScripts is a full call-scripting module which allows agents to interact with contacts and prospects to call in a knowledgeable and consistent way. Also, agents have a set of activities to perform for a particular campaign.

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.
4. In the Overview list, select the appropriate contact.
5. In the Overview view, click Script.
6. In the Explorer view, complete each field based upon the customer's response to the question, and then click Next.
7. When finished with the questions, click Finish.

NOTE: The language field determines which language the script runs on. If no language is selected then the system defaults to the application default language.

Additional Contact Information

Agents can get additional information on a contact by clicking on the Last Name hyperlink in the Overview view. However, if you make changes to the record those changes are not carried over to the Contacts/Prospect Details form. To have the changes that you made be reflected, you will need to add the contact to the campaign again.

Campaign Charts

Campaign charts allows agents to assess performance in areas such as completed calls, and lead quality by campaign. It then allows you to graphically display the results. You are able to access these charts by navigating to the Campaigns screen, Charts view.

For more information on setting up the information to be displayed in the charts, refer to the Campaigns chapter in *Applications Administration Guide, MidMarket Edition*.

The following table describes the different charts available to you on the Campaign screen.

Table 10-1. Campaign Charts (1 of 2)

Chart	Descriptions
Campaign Achievements	This chart represents the percentage achievement of quota for each campaign.
Call Status Analysis	This chart displays the number of calls that have been completed versus the number of calls that have not been completed for each campaign. Call center managers will use this chart to manage which campaigns are taking longer and where to shift resources.
Call Status Analysis by Employee	This chart displays the number of calls that have been completed versus the number of calls that have not been completed for each campaign for a specific employee.
Lead Quality Analysis by Campaign	This chart displays the opportunities that have been created for a campaign when the response type is equal to opportunity. It can display the opportunities based on each campaign or the opportunities based on their lead quality.
Lead Quality Analysis by Response	This chart displays the opportunities that have been created for a campaign when the response type is equal to response. It can display the opportunities based on each campaign or the opportunities based on their lead quality.

Table 10-1. Campaign Charts (2 of 2)

Chart	Descriptions
Opportunity Revenue Analysis	This chart displays the number of opportunities and the expected revenue for those opportunities for each campaign. The left axis represents opportunity revenue and the bar chart corresponds to revenue. The right axis represents the number of opportunities and the line chart corresponds to revenue. This chart helps you to see the relationship between amount of revenue in relationship to the number of opportunities.
Opportunity Revenue Analysis by Employee	This chart displays the number of opportunities versus the potential revenue for opportunities for each employee. It is similar to the Opportunity Revenue Analysis only on an employee basis.
Campaign Trend Analysis	This chart displays the total number of responses for each campaign over a period of time. The period can be specified by day, week, month, quarter, and year.
Campaign Trend Analysis by Employee	This chart displays the total number of responses generated by each employee across campaigns over a period of time. The period can be specified by day, week, month, quarter, and year.

Campaigns

If the campaign response type is equal to opportunity, then the Create Opportunity command is enabled. Agents then have the ability to generate one opportunity for each contact.

If a SmartScripts module has not been created for a campaign, agents can use the text based call guide and the Create Opportunity button to conduct the campaign and generate an opportunity from the campaign. When they do this, they are taken to the Campaigns Leads view. The opportunity is then assigned to a sales representative.

Once they create the opportunity, they will want to enter the information about the opportunity including opportunity quality and contact profile information. By clicking on the Script button in the Profile list, they can launch a SmartScript to enter the profile information.

NOTE: A script would have to be associated with the Opportunity Business Component in Tools for this to work properly. You may also create a new activity and assign it to a sales representative. For more information on modifying business components, see *Siebel Tools Reference, MidMarket Edition*. For more information on creating SmartScripts, see *Siebel SmartScript Administration Guide, MidMarket Edition*.

To start a SmartScripts session

1. Navigate to the SmartScripts screen.
2. From the Show drop-down list, select All SmartScripts.
3. From the SmartScripts list, click the Name hyperlink of the script you would like to launch.
4. Complete each field based upon the customer’s response, and then click Next.
5. When the Script has been completed, click Finish.

NOTE: SmartScripts sessions can also be initiated from the Campaigns Overview or Campaign Contacts/Prospects view by clicking the Script button.

Tracking Script Progress

After a script has been launched, the SmartScripts Explorer view appears. To use this feature, the agent asks the customer a series of questions. After each answer, click the Next button and proceed to the next question. The most current question is highlighted.

Markings in the Explorer window indicate the following:

- The red asterisk indicates a required field.
- The question mark means that the question is optional.

NOTE: If you get interrupted during your script you can save and resume the script at a later point.

Generating Responses from Campaigns

After the campaign has started, an agent will receive responses back from the contacts you solicited. Log these responses into the application to determine which contacts can be pursued as opportunities.

If the Response Type field in the campaign is equal to Response, then the agent will need to click on Create Response. This creates a new response. An agent also has the option to click on View Response which takes him or her to an already created response. The agent may create multiple responses for a contact.

An agent can create an opportunity from a response by clicking Create Opportunity from the menu button as well as associate attachments, orders, and products to a response.

To create a response

1. Navigate to the Responses screen.
2. From the Show drop-down list, select My Responses.
3. In the Responses list, click the menu button, and then click New Record.
4. In the New Response form, complete the necessary fields.

   NOTE: When you click Response Type, the Response Details form will dynamically change to gather the necessary information.

5. Click the menu button, and then click Save Record.

Responses View

Agents can view responses pertaining to a particular campaign from the Campaigns screen, Responses view. This gives them the ability to view every response that pertains to a specific campaign.

To view responses associated with a campaign

1. Navigate to the Campaigns screen.
2. From the Show drop-down list, select My Campaigns.
3. In the Campaigns list, select the campaign to which you want to view the responses.
4. Click the Responses view tab.
5. In the Response list, click the Description hyperlink of the response you would like to view additional details about.

NOTE: Click the menu button and select Create Opportunity to promote responses to opportunities and prospects to contacts.

Promoting a Response to an Opportunity

After completing the call, an agent can return to the Responses screen. If the customer is interested in the product that the campaign offers, an agent can promote the response to an opportunity by clicking the Create Opportunity from the menu button.

To promote a response to an opportunity

1. Navigate to the Responses screen.
2. From the Show drop-down list, select My Responses.
3. In the Responses list, select the response to promote.
4. Click the More Info view tab.
5. In the More Info form, click the menu button, and then click Create Opportunity.
6. Click the menu button, and then click Save Record.

NOTE: If the customer is an existing contact, the application automatically associates the account with the opportunity. If the customer is a prospect, the application automatically promotes the customer to a contact, and then associates the contact with an account.

Confirming the Response was Promoted

After an agent chooses Create Opportunity from the menu button, the information is transmitted to the Opportunities screen. At this point, the agent can verify that the information has been attached to the opportunity and the prospect has been promoted to a contact.

Response Charts

Response charts allow an agent to assess performance in areas such as responses received from campaign calls, number of opportunities created, and number of responses per offer. The chart functionality then allows you to graphically display the results. Agents are able to access these charts by navigating to the Responses screen, Charts view.

For more information on setting up the information to be displayed in the charts, refer to *Applications Administration Guide, MidMarket Edition*.

The following table describes the different charts available to you on the Responses screen.

Table 10-2. Response Charts (1 of 2)

Response Campaign Analysis	This chart displays the total number of responses for each campaign. The campaign name is associated with the response. It is based on the campaign name in the All Responses list or the My Responses list.
Response Opportunity Analysis	This chart displays the total number of opportunities created for each campaign. This chart is based on the information in the Opportunity Source field.
Response Offer Analysis	This chart displays the total number of responses per offer. This chart is based on the Offer name in the All Responses list or the My Responses list.
Response Offer Type Analysis	This chart displays the total number of responses per offer type. This chart is based how many responses were received for each offer type across all campaigns.
Response Offer Type Analysis by Campaign	This chart displays the total number of responses per offer type for each campaign. This chart is based on how many responses were received for each offer type within each campaign.

Table 10-2. Response Charts (2 of 2)

Response Revenue Analysis	This chart displays the total revenue for each campaign and the total number of opportunities for each campaign. The bar chart has the revenue by campaign and the line graph shows the number of opportunities for each campaign. The revenue number comes from the sum of the Revenue field in the opportunity with the Source field equal to the campaign name.
Response Average Opportunity Revenue Analysis	This chart displays the average revenue for each campaign. For each opportunity created for the campaign, the revenue is added and the average is taken across all opportunities created for the campaign.

Opportunities 11

Opportunities Overview

An opportunity is a potential revenue-generating event. An opportunity usually includes accounts, contacts, products, quotes, activities, and competitors. Every sale begins as an opportunity, but not every opportunity ends in a sale.

A generic opportunity tracking process may look like this:

Start with a qualified lead

Generate an opportunity

Associate data with the opportunity

Respond to the customer’s questions

Generate an activity plan

Business Scenario

The Opportunities screen and views are a central part of using the application if you are involved in customer contact activities at your company.

For example, you place a call to a customer to discuss this month’s campaign. You are offering an upgrade on some computer equipment the customer purchased last year. Your customer expresses an interest in upgrading her equipment and would like to talk to her boss about it before she makes a commitment.

The first thing you do is enter this opportunity into the application, then you schedule a follow up phone call activity, record any other activity to-do’s, and enter the name of your customer’s boss as another contact.

As you continue to gather information about the account, its contacts, and the opportunity, update the information in the Opportunities screen. This way, the information is saved and always available.

If the customer is interested, you can generate a quote and then an order from the Opportunities screen. By tracking opportunities you can forecast the pipeline and understand the potential revenue.

Generating an Opportunity

Sales representatives can view and create new opportunities in the Opportunities screen. After an opportunity is generated, they can get more information about the opportunity and its related contact information.

To create a new opportunity

1. Navigate to the Opportunities screen.
2. From the Show drop-down list, select My Opportunities.
3. In the Opportunities list, click the menu button, and then click New Record.
4. In the Opportunities list, complete the necessary fields.
5. Click the menu button, and then click Save Record.

To add additional information to an opportunity

1. Click the More Info view tab.
2. In the More Info form, complete the desired fields.
3. Click the menu button, and then click Save Record.

Associating Data

When sales representatives click an opportunity hyperlink, they see contacts associated with the opportunity. The Contacts view allows them to review, edit, or add additional contact information if necessary.

To add a contact

1. Navigate to the Opportunities screen.
2. From the Show drop-down list, select My Opportunities.
3. In the Opportunities list, select the opportunity with which the contact will be associated.
4. Click the Contacts view tab.
5. In the Contacts list, click the menu button, and then click New Record.
6. In the Add Contacts dialog box, select the contact, and then click OK.
7. In the Contacts list, click the menu button, and then click Save Record.

Associating Products

Sales representatives can associate specific products with a new opportunity. After they enter this information, or they can click the Product hyperlink to find additional information such as product features and prices. They can also use this information when building a quote based on an opportunity.

To associate products to an opportunity

1. Navigate to the Opportunities screen.
2. From the Show drop-down list, select My Opportunities.
3. In the Opportunities list, select the opportunity with which this product will be associated.
4. Click the Products view tab.
5. In the Products list, click the menu button, and then click New Record.
6. In the Products list, complete the necessary fields.
7. Click the menu button, and then click Save Record.

Products

Product views allow sales representatives to answer a customer’s questions about the products that he or she is interested in purchasing. They can research and discuss the specific features of the products for an opportunity or they can look up competitive positioning information to help move the opportunity toward a successful close.

Key Features and Product Image

The Opportunities screen, Products view allows sales representatives to discuss and associate your organization’s products with an opportunity.

To view product information

1. Navigate to the Opportunities screen.
2. From the Show drop-down list, select My Opportunities.
3. In the Opportunities list, select the opportunity.
4. Click the Products view tab.
5. In the Products list, click the Product hyperlink.

   The Key Features and Product Image lists appear. From this screen you can talk about the product with the customer.

Product Comparisons

Product comparisons provide a feature-by-feature comparison of related products. This feature is useful when preparing for meetings, making sales calls, or speaking to a prospect on the telephone.

To view product comparisons

1. Navigate to the Products screen.
2. From the Show drop-down list, select All Products.
3. In the Products list, select the product with which the comparison will be made.
4. Click the Product Comparison view tab.

   The Product Comparison list appears.

   NOTE: From this screen you can compare products to discuss with your potential opportunities.

Views A

Most Commonly Used Views

Table A-1 shows view tabs that are common to a number of screens throughout the Siebel application.

Table A-1. Common Views (1 of 2)

View	Description
Activities	View and associate activities with a record.
Agreements	Associate agreements with the selected record.
Attachments	Launch files created in other programs and attach them to the selected record.
Calendar	Add appointments, meetings, and other relevant events to the selected record by entering them in the Calendar view.
Categories	Associate categories with accounts, opportunities, products, and contacts.
Change Requests	Create any change requests associated with the selected record.
Contacts	Associate contacts with the selected record.
Charts	View charts associated with the selected record.
Explorer	View information in a hierarchical format, similar to that of Windows Explorer.
Literature	View brochures, white papers, and other items associated with the selected record.
More Info	View detailed information about the selected record.
Notes	Associate text notes with the selected record. These can be shared with others or they can be private.
Opportunities	Associate new or existing opportunities with the selected record.

Table A-1. Common Views (2 of 2)

View	Description
Orders	Add orders to the selected record.
Organizations	View organizations related to the selected record.
Products	Associate products with the selected record.
Profile	View important information about the selected record.
Quotes	Add quotes to the selected record.
Summary	Add a summary of the selected record.

Index