



SIEBEL⁷
eBusiness

**PRODUCT ADMINISTRATION
GUIDE
MIDMARKET EDITION**

eBUSINESS APPLICATIONS

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Who Should Use This Guide

This guide explains how to create and manage products. This includes creating attribute-based customizable products that have interactively configurable attributes.

This guide will be useful primarily to people whose title or job description matches one of the following:

Product Administrators	Persons responsible for defining and managing products and product lines.
Siebel Application Administrators	Persons responsible for planning, setting up, and maintaining Siebel applications.
Siebel Application Developers	Persons who plan, implement, and configure Siebel applications, possibly adding new functionality.

How This Guide Is Organized

This guide describes how to create and manage products and product lines. The guide deals with two types of products: simple products and attribute-based customizable products.

Simple products are those that cannot be interactively configured. For example, you sell a model of telephone that has no attributes or components that can be configured at the time of quote or purchase. This is a simple product.

An attribute-based customizable product is one that has interactively configurable attributes. For example, the telephone has an attribute called Color. The user can select one of several available colors for the telephone.

The chapter on basic product administration describes administration tasks common to both simple and customizable products. If your product lines contain only simple products, this chapter is intended to meet most of your product administration needs. The remaining chapters describe how to create and manage customizable products that have attributes.

The organization of the guide is task-oriented. Each chapter describes a group of related tasks. The key concepts required to understand and apply these tasks are presented at the beginning of each chapter. The title of these conceptual topics begins with the word “Understanding” for example, “Understanding Classes.”

The remainder of each chapter contains the tasks. The titles of tasks begin with a gerund (an “ing” word), for example “Managing Attribute Values.” Task topics begin with conceptual material or facts to do the task correctly. If you do not find the information you need in the task topic, review the chapter’s conceptual topics.

The steps in each task are numbered, 1, 2,3 and so on. Workflows are collections of tasks that must be performed in order. Workflows are presented throughout the guide. The tasks in a workflow are numbered a, b, c and so on.

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.

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 and the *Documentation Roadmap, MidMarket Edition*.

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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).

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

Contacting Siebel Technical Support

Do you know how to access Siebel Technical Support? It is crucial that you understand the requirements for getting support before you encounter technical issues that require Siebel Technical Support's assistance. This will facilitate smooth resolution of your issues. If you have questions, please don't hesitate to contact us.

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

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

To provide efficient, timely support and access to the Technical Support knowledge base:

- Siebel Technical Support is primarily Web-based; it can be accessed through Siebel SupportWeb (<http://ebusiness.siebel.com/supportweb/>). Please submit new service requests to us through SupportWeb, where you can also search the knowledge base for solutions.
- Designated contacts receive read/write access to Siebel SupportWeb. All other project team members at your company receive read-only accounts so that they can access the knowledge base.

To register for Siebel training, access <http://siebeluniversity.siebel.com/edPortal> and choose Implementation Team Training.

Please submit your technical issues and updates to Siebel SupportWeb (<http://ebusiness.siebel.com/supportweb/>). If you do not have a SupportWeb account, or if you have a question, please contact us at support@siebel.com or call your local Siebel Support Center:

- **North America:** + 1 800 214 0400 or + 1 650 295 5724
- **Brazil (São Paulo):** + 55 11 5110 0800
- **UK (London):** + 44 800 072 6787 or + 44 1784 494949
- **Germany (Munich):** + 49 89 95718 400

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Contacting Siebel Technical Support

- **France (Paris):** + 44 800 072 6787 or + 44 1784 494949
- **Ireland (Galway):** + 44 800 072 6787 or + 44 1784 494949
- **Japan (Tokyo):** 0120 606 750 (Japan domestic only),
+ 81 3 5464 7948 (outside of Japan)
- **Singapore:** + 65 212 9266

Outside of local support center hours, Gold and Rollout Support Option customers can call + 1 800 214 0400 or + 1 650 295 5724.

We appreciate your business and look forward to working with you.

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
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doc@siebel.com

We appreciate your feedback.

Introduction

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About This Chapter

This chapter provides information on how to navigate to views and screens. It also describes important product administration workflows.

Screens, Views, and Navigation

Product Administration and Application Administration are the two screens you will use most frequently to perform the tasks in this guide. The Product Administration screen is where you create and manage both simple and customizable products.

The Application Administration screen is where you define the product classification system and its attributes. You also define lists of values and other things that support product definitions.

Navigate to the Product Administration and Application Administration screens by using the Site Map, located in the View menu. Both these screens contains several views. You can navigate to these views using the Site Map or by using drop-down menus within the screens.

When you create a record, stepping off the record causes the record to be saved automatically. However, after you create a record, you should open the applet menu and click Save. This is good operating practice and minimizes errors in creating or editing records.

Included in many views is a More Info tab. When you click this tab, the view expands to display additional information about the record selected in the associated list. This information is displayed in a form. In some cases, this information can be even further expanded by clicking the show more button located in the upper-right corner of the form.

When you do queries, in some cases the query results display as one record in the More Info form. To see all the records returned by the query, click the More Info tab. The form contracts and is replaced by a list of all the query records.

The path syntax used throughout the Guide is based on an English language installation in an NT environment. Modify the path syntax as needed for other languages and operating systems.

Logging On as the Siebel Administrator

The Siebel database server installation script creates a Siebel administrator account that can be used to perform the tasks described in this guide. For more information, see *Siebel Server Installation Guide, MidMarket Edition* and *Siebel Server Administration Guide, MidMarket Edition*.

To log on as the Siebel administrator, start the application and log on using the user name and password assigned by your database administrator. Generally, the Siebel administrator connects to the server database.



Caution: Do not perform system administrative functions on your local database. Although there is nothing to prevent you from doing this, it can have serious results. Examples include:

- Data conflicts
- An overly large local database
- A large number of additional transactions to route

Important Workflows

A procedure (also called a task) is a group of one or more numbered steps that you perform to complete a defined task. For example, creating a product record is a procedure. This procedure contains several steps.

Workflows are groups of procedures that you perform to accomplish important goals. For example, creating a hierarchy and defining attributes for classes are two procedures in the workflow for creating a product class system.

The procedures in the workflows below correspond to those listed in the guide's table of contents. Do the procedures in the order in which they are presented in each workflow. These workflows are guidelines for accomplishing important product administration tasks. Adapt them as needed to fit local operations.

NOTE: There is no relationship between the definition of a workflow in this guide and the definition of a workflow in the Siebel Workflow application.

The key workflows in product administration are the following:

- Create a product class system
- Create a simple product
- Create an attribute-based customizable product

A simple product is one that does not have attributes that users can interactively configure when creating a quote or purchasing the product. A customizable product is one that has attributes. When creating a quote or purchasing the product, the user can choose a value for each product attribute.

For example, one of your product lines is gardening tools. None of the tools have attributes. These are simple products. Another of your product lines is bath towels. Each size of towel comes in one of several colors. These products are customizable because they have an attribute, Color, that the user can choose at the time of purchase.

The workflows below are made up of tasks, which are listed in the description of each workflow. The tasks in the workflows correspond to tasks in the guide's table of contents. In a workflow, perform the tasks in the order in which they are presented.

These workflows are guidelines for accomplishing important product administration tasks. Adapt them as needed to fit local operations.

Create a Product Class System

If your product lines include attribute-based customizable products, you must complete this workflow.

- a** Create a class hierarchy
- b** Define attributes for classes
- c** Define lists of values (LOVs)
- d** Edit attribute definitions to add LOVs

Create a Simple Product

This workflow creates a simple product.

- a** Create a product record
- b** Associate the product with a price list
- c** Associate the product with a catalog
- d** Add the product to a product line

Create an Attribute-Based Customizable Product

You create attribute-based customizable products by assigning them to a product class that has attributes. All products assigned to a product class inherit the attributes defined on the class.

When the user creates a quote or purchases the product on a Web site, the product displays with its attributes, and the user can select the desired attribute values.

- a** Complete the Create a Product Class System workflow.
- b** Complete the Create a Simple Product workflow.
- c** Assign the product to a product class.

Basic Product Administration

2

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About This Chapter

This chapter describes the basic product administration tasks common to both simple and attribute-based customizable products.

Understanding the Product Record

Non-configurable products are called simple products. Products that are interactively configurable at the time of purchase are called customizable products. Attribute-based customizable products have attributes such as color that the user can select.

You enter products into the Siebel database by creating product records. This record stores important information about the product. The only required field in the product record is the product name. However, it is important to associate the record with a price list, a product line, and a category. This allows users to create quotes and to find important information about the product. Categories are how you control access to the product by other users. If the product has user-configurable attributes, you should also assign the product to a product class.

The following table lists the fields in the product record. Some of the fields are toggles. You activate or deactivate these fields by clicking on them. An X or check mark displays when the field has been selected. Except where noted, the default for toggles is blank, not selected.

Table 2-1. Fields in the Product Record (1 of 5)

Field	Description
Product	Enter the name of the product. This is the only required field.
Part #	Enter the part number of the product.
Description	Enter a brief description of the product.
Product Line	Select the desired product line for the product.
Type	Select one of two types: product or service.

Table 2-1. Fields in the Product Record (2 of 5)

Field	Description
Thumbnail Image File Name	Select the thumbnail image file associated with the product. You can also select the thumbnail image in Product Administration > Product Images.
Effective Start	Enter the date on which the product becomes available. The product does not display in price lists and cannot be added to quotes until this date.
Effective End	The date after which the product is unavailable. After this date the product does not display in price lists and cannot be added to quotes.
Targeted Industry	Select the industry you want to target with this product.
Targeted Postal Code	Enter the postal code where you want to target sales of this product.
Target Country	Select the country where you want to sell this product.
Target Min Age	Enter the minimum age of buyers for this product.
Target Max Age	Enter the maximum age of buyers for this product.
Target M/F	Select the gender (male, female) of the buyers you want to target with this product.
Revision	Enter the version of the product as it goes through revisions.
Status	Select the status of the product: prototype, alpha, beta, and so on.
Orderable	Click the box if the product can be ordered. Determines whether a product can be listed as a quote line item on a quote. All components you add to a customizable product must be orderable.
U/M	Select the unit of measure by which the product is sold, for example, Each.
Qty	Enter the number of items in the unit of measure. For example, if the unit of measure is a case, Qty would be the number of items in the case, such as 24.
Project Resource	Click the box if the product is a service for a project. This determines if the product is going to be available in the rate list.

Table 2-1. Fields in the Product Record (3 of 5)

Field	Description
Compensable	This field is used by Siebel's Incentive Compensation application, which is not supported in Siebel 7, MidMarket Edition. Do not put a check mark in this field. Please see the Release Notes for details.
Tool	Click the box if this product is a tool, such as one used by field service engineers.
Auto Allocate	This feature is not available in Siebel 7, MidMarket Edition. Please see the Release Notes for details.
Auto Substitute	This feature is not available in Siebel 7, MidMarket Edition. Please see the Release Notes for details.
Allocate Below Safety	Click the box to allow allocation below the safe inventory level of this product.
Sales Product	Click the box if the product is a sales product. Specifies if the product can be sold. If this box is not selected, the product will not display in the product pick list.
Service Product	Click the box if the product is a service. Only products designated as service products will display when you click the Service button on a quote.
Customizable	This field is used by Siebel eConfigurator, which is not supported in Siebel 7, MidMarket Edition. Do not put a check mark in this field. Please see the Release Notes for details.
Class	The product class to which you want to assign this product. The product will inherit all the attributes defined on the class or that are inherited by the class.
Class Product	This field is used by Siebel eConfigurator, which is not supported in Siebel 7, MidMarket Edition. Do not put a check mark in this field. Please see the Release Notes for details.
Primary Vendor	Select the primary vendor for the product. The primary vendor must be specified to associate the product with an opportunity in the Opportunity Product Analysis Chart view.
Vendor Site	Displays the primary vendor's location. This field is filled automatically when you select a vendor.
Vendor Part #	Enter the vendor's part number for this product.

Table 2-1. Fields in the Product Record (4 of 5)

Field	Description
Lead Time	Enter the standard lead time for ordering the product. Measured in weeks. For example, if you enter 2, this means 2 weeks.
Field Replaceable	Click the box if this is a field replaceable unit.
Return if Defective	Default: The box contains a check mark or X. This means defective products should be returned by the customer when a replacement part is shipped. Remove the check mark if customers should not return defective parts.
Integration Id	Enter the back-office application product Id. This field can be used by SAP and Oracle Product Connectors.
Organization	Can be used for setting up user access to products but is not recommended. Instead, set up user access by assigning products to categories.
Division	Can be used for setting up user access to products but is not recommended. Instead, set up user access by assigning products to categories.
Serialized	Click the box if movement of the product (a transaction) requires an asset number or its corresponding serial number. The default is no check mark or X (not serialized).
Equivalent Product	Displays the primary equivalent product. Click in this field to display all equivalent products or to add additional equivalent products.
Parent Product	Select the parent product. This field is for record keeping only and is not used for creating or managing customizable products that have components.
Product Level	Enter the numeric product level in the product hierarchy. This field is for record keeping only and is not used to create or manage the product class system.
MTBF	Enter the mean time between failure for the product.
MTTR	Enter the mean time to repair the product.
Item Size	Enter the numeric product size.
Shipping Via	Select the shipping mode: air ground, and so on.

Table 2-1. Fields in the Product Record (5 of 5)

Field	Description
Ship Carrier	Select the name of the shipping carrier for this product.
Pageset	This field is used by Siebel eConfigurator, which is not supported in Siebel 7, MidMarket Edition. Do not make an entry in this field. Please see the Release Notes for details.

Creating a Product Record

You enter products into the Siebel system by creating product records. The product record contains the product name and important information about the product, such as its product line name or part number.

Once a product record is created, it cannot be deleted. To prevent a product record from being displayed in picklists and dialog boxes, edit the product record to deselect the Orderable, Sales Product, and Service Product check boxes. You can also control display of the product by setting Effective Start and Effective End dates.

After creating a product record be sure to do the following things:

- a** Associate the product with a price list.
- b** Set up user access to the product. You do this by adding the product to a category. Categories are how product visibility is controlled. You must add a product to a category to make it selectable in a quote and to make it visible in eSales Web pages.

To create a product record

- 1** Navigate to Product Administration.
- 2** Add a new record.
- 3** In More Info form, click the show more button.
The long version of the Products form appears.
- 4** Fill in the fields in the product record and click Save.

Editing a Product Record

You can change the content of any of the fields in a product record. Changing the class to which a product is assigned can change the attributes it inherits.

Changing the class to which a product is assigned can change the attributes the product inherits. If the product's attributes change, you must revise all customizable products in which the product is component. Verify that no configuration rules or scripts refer to attributes the product no longer has.

To edit a product record

- 1 Navigate to Product Administration.
- 2 Select the desired Product.
- 3 Click in the desired field in Products to edit the record, or edit the desired field in the More Info form.

To see all the fields in the product definition click the show more button in More Info.

- 4 Save the record.

Copying a Product Record

When you copy a product record, all parts of the product definition are included in the copy.

To copy a product record

- 1 Navigate to Product Administration.
- 2 Select the product you want to copy.
- 3 Open the menu and choose Copy Record.

A new record displays.

- 4 Enter a name for the copy in the Product Field.
- 5 Revise other fields, such as Part # as desired.
- 6 Save the record.

Deleting a Product Record

Once you have created a product record, it cannot be deleted. However, you can edit all the fields in the record, including the product name.

Associating Products with Price Lists

You associate products with price lists in Product Administration > Price Lists. Associating a product with a price list adds a line item for that product to the selected price list.

For more information on price lists, see the *Pricing Administration Guide, MidMarket Edition* or the *Applications Administration Guide, MidMarket Edition*.

To associate a product with a price list

- 1** Navigate to Product Administration.
- 2** Select the desired product.
- 3** Open the More Info menu and choose Price Lists.

Price lists associated with the product appear.

- 4** Add a new record.

The Add Price Lists picklist appears.

- 5** Click Add to select a price list.

The price list appears under Price Lists.

- 6** Fill in the remaining fields to set the price of the product and click Save.

Service Price %. The price of a service contract as a percentage of either the list price or net price. You pick one of these in the Service Pricing Method field.

Service Pricing Method. Select list price or net price.

Setting Up User Access

User access means whether or not the user can select a product for a quote or whether the user sees the catalog or category containing the product in an eSales Web page.

The catalog administrator creates product catalogs, which contain product categories. The catalog administrator sets up access controls by assigning access groups to the catalog and to the categories.

The product administrator sets up user access to products, by assigning products to catalogs and categories. You can assign a product to more than one category, and thus more than one catalog. If the user belongs to a category's access group, a catalog's access group, or both, then the user can see the category in eSales Web pages. The user can also add the category's products to quotes.

Until you assign a product to at least one category, the product does not display in the following places:

- Pick Product dialog box used to add products to a quote. This means the product cannot be added to a quote.
- eSales Web pages. This means users cannot purchase the product.
- Products > All Products
- Products > All Products Across Catalogs

The recommended method for assigning users to access groups is to assign the users to organizations and then assign the organizations to the access groups.

To set up user access

- 1** Navigate to Product Administration.
- 2** Select the desired product.
- 3** Open the More Info menu and choose Category.
- 4** Open the Category menu and choose New Record.
A dialog box appears that lists all the currently defined categories.
- 5** Select a category from the dialog box.
- 6** Add additional categories as needed by creating new records.

Setting Start and End Dates for Display of a Product

You can set the start date and end date for display of a product. This controls the display of the product in price lists and therefore whether the product can be added to a quote or can be selected for purchase on a Web site.

To control display of a product, you set the Effective Start and/or Effective End dates. They govern display of a product as follows:

- If you specify an Effective Start date and no Effective End date, the product displays on the Effective Start date and will continue to display indefinitely.
- If you specify an Effective End date and no Effective Start date, the product displays immediately after you create it, and it stops display on the Effective End date.
- If you specify both an Effective Start Date and an Effective End date, the product display begins on the Effective Start date and stops on the Effective End date.

The Effective Start and Effective End date fields are fields in the product record. To view these fields, query for the desired record in Product Administration > Products and then select More Info. In the More Info display, click the show more button to view all the fields in the product definition.

Creating Product Line Names

You create product line names in Application Administration > Product Lines.

You add products to a product line by selecting a product line name in the product record. Navigate to Product Administration > Products to view product records.

To create a product line name

- 1** Navigate to Application Administration > Product Lines.
- 2** In Product Lines, add a new record.
- 3** Fill in the following fields.

Product Line. Required

Product Line Manager. Allows you to associate product line managers and other key personnel with the product line.

Products. Allows you to associate products with the product line. Products can also be associated with product lines on the Products page.

Description. Optional.

- 4** Save the record.

Creating Product Features

Products frequently share common features, such as size or data transfer rate. You create a list of these product features in Application Administration > Product Features. The features you create are added to a features picklist.

You assign features to products in the Application Administration > Product Key Features by selecting a product and then choosing the desired features from the features picklist.

Product features and product attributes are similar concepts. They both describe characteristics of the product that are of interest to customers. A product feature describes important characteristics of a product, particularly those that differentiate the product. For example, you sell a type of office chair that has aluminum construction. Your competitors sell the same office chair with steel construction. Aluminum construction is an important feature of the office chair because it differentiates the chair from your competitors. It is also a static feature and is not configurable. All of your customers who purchase this office chair get aluminum construction.

An attribute is a characteristic of a product that is configurable when creating a quote or purchasing the product. For example, the office chair fabric comes in one of three colors. Color is an attribute of the office chair because the user can choose the color at the time of purchase.

To create product features

1 Navigate to Application Administration > Product Features.

2 In Product Features, add a new record.

The Product Features form appears.

3 Fill in the following fields.

Feature. The name of the product feature.

Product Line. Allows you to associate a product line with the product feature.

Description. A brief description of the feature.

4 Save the record.

Assigning Key Features to a Product

Product key features are those features that you have defined in Applications Administration > Product Features. The system automatically adds these features to a features picklist so that you can assign them to individual products.

To assign a key feature to a product

- 1** Navigate to Product Administration.
- 2** Select the product to which you want to assign a key feature.
- 3** Open the More Info menu and choose Product Key Features.

The Product Key features list appears.

- 4** In Product Key Features, add a new record.
- 5** Enter the feature description, and click Save.

The feature appears in Product Key Features.

- 6** Repeat this procedure to add additional key features.

Viewing Product Attributes

If a product has been assigned to a product class, it inherits all the attributes defined on the class. Attributes are configurable characteristics of a product. When the user purchases the product, they select the desired value for the attribute.

You define product classes and attributes in Application Administration, Class Administration. You assign products to classes by choosing a product class in the product record.

To view a product's attributes

- 1** Navigate to Product Administration.
- 2** Select the desired product.
- 3** Open the More Info menu and choose Dynamic Attributes.

The Dynamic Attributes list displays and lists all the product's attributes.

In the attribute records, do not select an attribute value and save any of the records. This sets the attribute value so that it cannot be changed when users configure the product.

Defining Related Products

You can define several types of relationships between products. This causes the related products to appear together in other parts of the Siebel application.

To define related products

- 1** Navigate to Product Administration.
- 2** Select the product with which you want to associate related products.
- 3** Open the More Info menu and choose Related Products.
The Related Products list appears.
- 4** In Related Products, add a new record.
The Add Internal Products dialog box appears.
- 5** Select products and click Add.
- 6** The products appear in Related Products.
- 7** To change the relationship of the related product, click in the Relation field and choose the desired relationship from the drop-down menu.
- 8** Save the record.

Designating Equivalent Products

For each product you define, you can designate one or more other products as equivalent products. You can then display these products and compare their product features. You can also assign a ranking to the equivalent products that reflects their degree of equivalence.

You can designate one of the equivalent products as the primary equivalent product. The equivalent primary product is the one displayed in the Equivalent Products field in the product definition and other places where the display allows only one equivalent product to be shown.

To designate equivalent products

- 1** Navigate to Product Administration.
- 2** Select the desired product.
- 3** In the Products form, select Equivalent Product.

A dialog box displays. It lists all the equivalent products you have defined for this product.

- 4** Click New to add an equivalent product.

The dialog box displays a query form.

- 5** Query for the desired product and click OK.

The product appears in the Equivalent Products list in the dialog box.

- 6** Click in the Primary field to select the desired primary equivalent product.

- 7** Click OK to exit the dialog box.

The primary equivalent product appears in the Equivalent Product field in the product record.

Comparing Features of Equivalent Products

You compare equivalent products by displaying all the equivalent products for a product and then selecting which features you want to use for the comparison. You can then rank the equivalent products.

To compare features of equivalent products

- 1** Navigate to Product Administration.
- 2** Select the desired product.
- 3** Open the More Info menu and choose Product Comparison.

The Product Comparison list appears. Equivalent products are displayed in the columns.

- 4** In Product Comparison, add a new record.

A dialog appears that contains all the product feature definitions.

- 5** Query for the desired feature and click OK.

The feature is added to the Product Comparison list.

- 6** Repeat the steps above until all the desired features have been added.

- 7** Assign a ranking to the equivalent products, if desired.

A rank of 1 means a product has the highest degree of equivalence relative to the other equivalent products.

Creating a Product Auction

Siebel's auction management is not available for purchase with Siebel 7, MidMarket Edition. Please see the Release Notes for details regarding available products.

Creating Product Entitlements

Entitlements refer to the services that come with a product. They are created on the Product Entitlements page under Product Administration.

To create product entitlements

- 1** Navigate to Product Administration.
- 2** Select a product for which to create entitlements.
- 3** Open the More Info menu and choose Product Entitlements.

The Product Entitlements list appears.

- 4** In Product Entitlements, add a new record.
- 5** Click in the Name field and select an Entitlement template from the Entitlement Templates dialog box.

The entitlement template record is added to the Product Entitlements list.

- 6** Click in the Agree Line Item or Entitlement Template Products field to set these features.

A check mark appears to indicate these features are set.

Associating Literature with Products

You associate literature with products in Product Administration > Product Literature. Product literature can be such things as product bulletins, brochures, competitive analyses, and image files.

To associate literature with a product

- 1** Navigate to Product Administration.
- 2** Select a product with which to associate literature.
- 3** Open the More Info menu and choose Product Literature.

Literature items for the product appear.

- 4** In Product Literature, add a New Record.

The Add Literature dialog box displays.

- 5** Select the desired literature items and click OK.

The literature displays in the Product Literature list.

Adding Product News

Product news is information about a product, typically FAQs and service bulletins. You associate news with products in Product Administration > Product News.

Product news is not the same as product literature. Literature is associated with products in the Product Literature view under Product Administration.

To add a news item to a product

- 1** Navigate to Product Administration.
- 2** Select a product to which you want to add a news item.
- 3** Open the More Info menu and choose Product News.

News items for the product appear.

- 4** In Product News, add a new record.

The Pick Product News dialog box appears. To read a news item in the dialog box, place your cursor over it.

- 5** Select the desired news item and click OK.

The news item appears under Product News with its title under the Solution field and the solution type set to Product News.

- 6** Edit the record as needed by clicking in the desired field.
- 7** Save the record.

Associating Images with Products

You can associate both a thumbnail image and a regular image with a product. You can select image files for a product in either Product Administration > Products or in Product Administration > Product Images.

The following procedure describes how to associate images with a product in Product Administration > Product Images.

To associate images with a product

- 1 Navigate to Product Administration.
- 2 Open the More Info menu and choose Product Images.
The Product Images form displays.
- 3 In the form, click the Image File Name field and select an image from the dialog box.
- 4 In the form, click the Thumbnail Image File Name field and select an image from the dialog box.
- 5 Save the record.

Exporting and Importing Products

You can export product definitions to other databases and import them from other databases. When you export a file, its definition is stored in an XML file.

Exports

When you export a simple or customizable product the following information is exported:

- Product name
- Vendor name
- Part number
- Class name
- Orderable (Yes or No)

No other fields in the product record are exported.

The following things are not exported:

The class structure in which the customizable product or its component products reside. This must be exported separately.

Imports

The system uses the product name and its vendor name (if any) to uniquely identify it. An import will fail if the imported product specifies a vendor name that does not exist in the import database.

On an import, a product that has a vendor specified will overwrite an existing product in the import database under the following conditions:

- The product vendor exists in the import database.
- The product in the import database has the same name and same vendor.
- The product in the import database has the same name and no vendor.

On an import, a product that has no vendor specified will overwrite an existing product in the import database only if the existing product has the same name and no vendor specified.

Customizable Products

Complete the following workflow to export a customizable product from database A and import it into database B:

- a** Export the class structure for the customizable product and its component products from database A.
- b** Import the class structure into database B
- c** Compare the updated class structure in database B with database A.
- d** Export the customizable product from database A.
- e** Import the customizable product into database B.
- f** Verify that the customizable product's attributes are correct.

To export a product

- 1** If you are exporting a customizable product, review the workflows above.
- 2** Navigate to Product Administration.
- 3** Select the product you want to export.
- 4** Open the Products Menu and choose Export Product.

The Product Export dialog box displays.

- 5** To export a simple product or an attribute-based customizable product, click Export Single Product.

A File Download dialog box displays.

- 6** Select Save this file to disk.
- 7** Browse to the location where you want to store the XML file, specify the file name, and then click Save.

The system creates an XML file containing the product definition and stores it at the location you specified.

- 8** Close the File Download dialog box.

Verify that you have imported the related product class structure before importing a customizable product.

To import a product

1 If you are importing a customizable product, review the workflow above.

2 Navigate to Product Administration.

3 Open the Products menu and choose Import Product.

The Product Import dialog box displays.

4 Click Browse, locate the XML file containing the product you want to import, and then click Open.

The XML file displays in the Product Import dialog box.

5 In the Product Import dialog box, click Import.

The product is imported into the database.

6 In Products, query for the imported product.

Review the product record and verify it is accurate. Change the class name or other information as needed.

7 Set up pricing for the product as needed.

Obtaining a Product List Report

You can obtain a report that lists all the products in the product table. For each product, the report shows the following information:

- Product name
- Part number
- Description
- Unit of measure
- Vendor
- Product line
- Effective start date
- Effective end date

The product list displays in the Siebel Report Viewer. You can print the report or create an email attachment.



Tip: The on-screen display of the report typically lists more products on each page than the Products applet. Use the report to scan through the product table.

To obtain a product list report

- 1** Navigate to Product Administration.
- 2** In the View menu select Reports.
- 3** In the Reports dialog box, select Admin Product List.
- 4** Click Run.

The Siebel Report Viewer appears and displays the Admin Product List report.

- 5** Print the report or create an email attachment as desired.

Basic Product Administration

Obtaining a Product List Report

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About This Chapter

This chapter describes how to create product classes and class hierarchies. Classes provide a central location for defining product attributes. Products inherit the attributes of the classes to which they belong.

Understanding Classes

A product or service can be thought of as a collection of physical features and characteristics. Color, size, manufacturer, capacity, voltage, license type, expiration period, interest rate, and height are just a few of these. Those characteristics needed to describe your product meaningfully for your customers are called product attributes.

Classes provide a way to organize and administer product attributes. The key to understanding classes is inheritance. Attributes defined at the class level are automatically inherited by all the class members. When you assign a product to a class, it automatically inherits all the attributes defined for that class. Classes let you define what attributes are maintained for products, propagate those attributes to the products, and maintain those attributes in a consistent fashion.

When you define an attribute for a class, you specify both the attribute name and the range of values that the attribute can have. This range of values is called the attribute domain. For example, for a class called blanket, you define an attribute called color and define its domain to be green, red, and blue. Every blanket you assign to this class inherits the attribute color and its possible values.

Subclasses are classes that have a parent class. Subclasses have the following characteristics:

- Subclasses can be nested as deeply as needed. This forms the class hierarchy.
- Subclasses inherit the attributes of their parent class. As you nest downward, each subclass inherits the entire set of attributes from the classes above it.
- You can modify the definitions of inherited attributes. If you do so, this breaks inheritance from the parent class. Changes to attribute definitions in the parent class are not inherited by modified attributes in subclasses.

The class hierarchy is a mechanism for organizing and managing product attributes. It is separate from the mechanisms you use to organize products themselves, such as product lines and product categories. For example, you have the class hierarchy in [Figure 3-1](#).

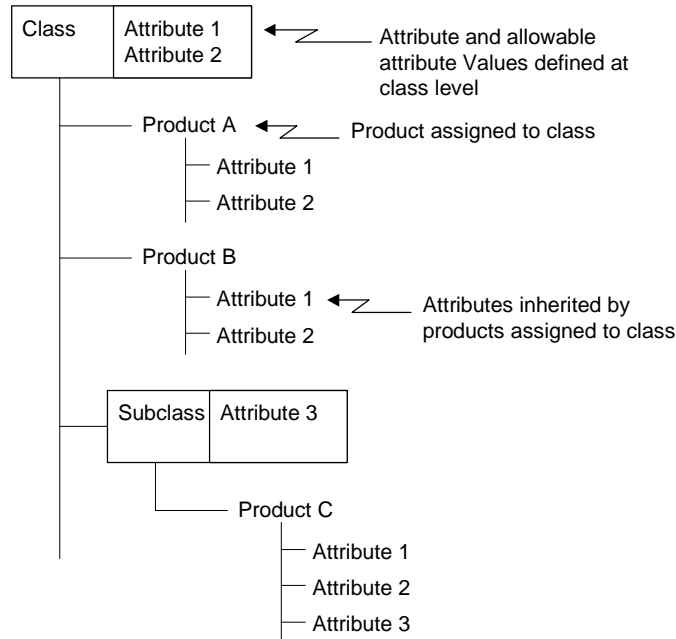


Figure 3-1. Class Hierarchy

Attributes 1 and 2 are defined on Class. Subclass inherits these attributes and also has an attribute definition of its own, Attribute 3. The products assigned to Subclass inherit all three attribute definitions.

In Application Administration > Class Administration, you can create classes, organize them into hierarchies, and define attributes for them.

A class record in Application Administration > Class Administration has the following fields:

- **Name.** This is the class name.
- **Display Name.** This is the name that is seen by the customer. If left blank, the name in the Name field is displayed to customers.
- **Parent Class Name.** If the class is a subclass, this field lists the parent class name.

Defining a Class

When you define a class, it is added to the list of all available classes. The name you choose must be unique. To create a subclass, specify a parent class in the definition.

To define a class

- 1** Navigate to Application Administration > Class Administration.
- 2** In Classes, add a new record.
- 3** Fill out the fields in the record and click Save.

To create a subclass, select a parent class in the Parent Class field.

The new class definition appears in the Classes list. It also displays in the Class Explorer view.

Creating a Class Hierarchy

A class hierarchy consists of classes and subclasses. A subclass is a class that has a parent class. In other words, subclasses are classes within classes. There is no limitation on how deeply you can nest subclasses.

You create and manage class hierarchies in Application Administration > Class Administration. You do this by specifying a parent class when defining a class.

You can view the hierarchy in Application Administration > Class Explorer. This view contains a tree applet that displays the hierarchy in a manner very similar to the Microsoft Windows or NT file Explorer. You can expand or collapse classes and subclasses as needed to view the hierarchy. The portion of the hierarchy in which you are located displays in the Classes list.

When you run a query on the Classes list, it only searches the currently highlighted level. For example, if you are at the class level, the query searches only the classes at that level. If you are at the first subclass level, the query only searches the list of first-level subclasses belonging to the parent class. Search results are displayed in the Classes list.

To create a class hierarchy

- 1** Navigate to Application Administration > Class Administration.
- 2** In the Classes list, select the desired class.
- 3** Click in the Parent Class field, and select a class from the dialog box.
- 4** In the Show menu, choose Class Explorer.

The Class Explorer displays and shows a tree display of product classes.

- 5** Locate and expand the parent class.

Verify that the subclass displays correctly beneath the parent class.

Editing a Class Definition

Editing a class definition record does not change the attributes defined on the class. However, if you change the parent class name of a subclass, this changes the location of the subclass in the class hierarchy and can change which attributes the products in the subclass inherit.

For example, a subclass SC1 has parent class PC1, which has three attributes defined on it A1, A2, A3. This means SC1 inherits attributes A1, A2, A3. Class PC2 has attributes A4, A5, A6 defined on it. If you change the parent class of subclass SC1 from PC1 to PC2, this changes the attributes inherited by SC1 to A4, A5, A6. You have moved SC1 from being a subclass of PC1 to being a subclass of PC2.

If you are changing the parent-class name for class, do the following procedure first.

To prepare a product class for a parent-class name change

- 1** Run a query in the Products list to identify all the products assigned to the class.
- 2** Analyze how changing the parent class name of the class will affect the attributes inherited by these products.

Before editing a class definition, make sure you have fully analyzed the impact on attribute inheritance.

To edit a class definition

- 1** If you are changing the parent class name of a class, verify that all the steps in preparing the class for a parent-class name change are complete.
- 2** Navigate to Application Administration > Class Administration.
- 3** In Classes, select the desired record.
- 4** Click in the desired field to edit the record.
The edited class definition appears in Classes.
- 5** Save the record.
- 6** Modify pricing as needed.

Deleting a Class

Deleting a class deletes attributes defined on the class. Deleting a class also deletes all subclasses of the class. Deleting a class does not delete the products assigned to the class or its subclasses.

For example, product A belongs to class B. There are six attributes defined on class B. This means product A has six attributes defined for it. If class B is deleted, product A no longer has attributes defined for it.

To prepare a product class for deletion

- 1** Run a query in the Products list to identify all the products assigned to the class.
- 2** Delete the class from these product records.

If there are attributes defined on the class, analyze the effect of removing these attributes from the products.

Before deleting a class definition, make sure you have fully analyzed the impact on attribute inheritance.

To delete a class definition

- 1** Verify that all steps in preparing a product class for deletion are complete.
- 2** Navigate to Application Administration > Class Administration.
The Class Administration view appears.
- 3** Select the desired the class.
- 4** Open the Classes menu and choose Delete Record.
- 5** Click OK when asked to confirm you want to delete the record.

Exporting or Importing Classes

You can export a class or the whole class structure to another database. When you export a class, the following parts are included in the export:

- The parent class of the class you are exporting plus all the subclasses of the parent class. When you export a class, the export contains not just the class you selected, but the portion of the class structure to which it belongs.
- Attribute definitions for the classes and all subclasses.
- List of values definitions associated with attribute definitions. List of values are exported in the current language only.

The products in the classes are not exported.

When you export the whole class structure, all classes and subclasses are exported, along with the items listed above. Products are not exported.

When you export a class or the class structure, an XML file is created in a location you specify. The XML file contains the exported class structure. When you import this class structure, the system reads the XML file and synchronizes the class system of the import database to the XML file. The XML file takes precedence, and the class system is modified to reflect the portion of the class system in the XML file.

For example, in the XML file the subclass shoes, has the parent class footwear. In the import database the subclass shoes has the parent class Wardrobe. After importing the XML file, the subclass shoes will have the parent class footwear.

Use the following workflow to update the class structure in database B with changes from database A.

- a** Back up database B.
- b** Export the desired classes from database A.
- c** Import the classes to database B.
- d** Compare the updated class structure and list of values definitions in database B with database A.
- e** Verify that components in affected customizable products in database B have the correct attributes.

Use the following workflow to update both the products and class structure in database B with changes from database A:

- a** Use the workflow above to update the class structure in database B.
- b** Export the products from database A, except customizable products.
- c** Import the products into database B. Verify that the products are in the correct classes and inherit the correct attributes.
- d** Export customizable products from database A.
- e** Import customizable products to database B. For each customizable product, verify that the component products are present and have the correct attributes.

To export a class or the whole class structure

- 1** Review the workflows above.
- 2** Navigate to Application Administration > Class Administration.
The Class Administration view appears.
- 3** Select the class you want to export.
- 4** Open the Classes menu and choose Export Class.
The Class Export dialog box appears.
- 5** To export the class click Export in the Class Export dialog box. To export the whole class system, click Export All.
A Save As dialog box appears. If the database is remote, a download dialog box also appears.
- 6** Browse to the location where you want to store the file, specify the file name, and then click Save.
The system creates an XML file containing the exported class structure and stores it at the location you specified.
- 7** Close the Class Export dialog box.

When you import a class structure, you must import the entire contents of the export file. You cannot choose which classes in the file to import.

To import a class structure

- 1** Review the workflows above.
- 2** Navigate to Application Administration > Class Administration.
- 3** Open the Classes menu and choose Import Class.
The Class Import dialog box appears.
- 4** Click Browse, locate the XML file containing the class structure you want to import, and then click Open.
- 5** In the Class Import dialog box, click Import.
The new class structure is imported into the database.
- 6** Open the Show menu and choose Class Explorer.
- 7** In the Class Explorer tree applet, expand classes as needed to verify that the imported classes are correctly placed.

Locating a Class

The Class Explorer view includes a tree applet that you can expand or collapse to display the hierarchy of product classes. Use the Class Explorer to locate classes and to verify the class hierarchy after you have edited it.

To locate a class

- 1** Navigate to Application Administration > Class Explorer.
The Class Explorer view appears. Classes display in a tree applet and in the Classes list.
- 2** Click on a class name in the tree applet to display its subclasses.
- 3** To query for a class, click Query in the Classes list.
Results are displayed in both the tree applet and in the Classes list.

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About This Chapter

You can define attributes for a wide variety of items, such as products, literature, and so on. This chapter focuses on doing so with products and explains how to define attributes, provide attributes to products, and set attribute values for products.

Before defining attributes, you must create a hierarchy of product classes and subclasses.

Understanding Product Attributes

Product attributes, also called dynamic attributes, are customer-facing, configurable characteristics of a product or its components. For example, you sell a product in three colors. As part of creating this product, you would define an attribute called Color and assign it the three colors. As part of purchasing the product, customers would choose one of the colors.

Product attributes and product features are similar concepts. They both describe characteristics of the product that are of interest to customers. However, feature definitions are static and are not configurable when creating quotes or purchasing the product. For example, you could define a feature: “Comes in three colors, red, green, and blue.” This feature definition can be displayed to the user as a message only. It does not create the mechanism for choosing the color. To create that, you must define a product attribute and assign it the values red, green, and blue.

A product attribute has two parts: the name of the attribute and the value of the attribute. For example, you could define an attribute with the name Color and the values red, green, or blue. The allowable values for an attribute are called the attribute domain. The user can select only one value for an attribute.

You can define attributes directly in the administration interface. You do not need to create database table extensions or new field definitions in Siebel Tools.

Attributes are implemented in a way that allows users to select the desired attribute value when they configure the product. For example, when a user creates a quote, the Color attribute displays in the interface, and the user can select the desired value.

Classes are the way you organize and administer product attributes. The key to understanding classes is inheritance. Attributes defined at the class level are automatically inherited by all the class members. When you assign a product to a class, it automatically inherits all the attributes defined for that class. Classes let you define what attributes are maintained for products, propagate those attributes to the products, and maintain those attributes in a consistent fashion.

You can define attributes at the class or subclass level. You cannot define an attribute at the product level. At the product level, users can only select the attribute's value.

Attribute Domains

When you define an attribute, you must define the domain of allowable values for the attribute. There are two methods for defining the domain:

- **List of values.** A list of values domain is a list of the specific values the attribute can have. When the user configures a product, they select one of the values from a drop-down menu. For example, the attribute Color could have the list of values red, green, or blue.

A special case of a list of values domain is a list of values that contains only one value. This is useful for creating attributes that you use for managing resources. For example, you could create an attribute called slots-consumed for a class of computer expansion cards. Typically, each card requires one expansion slot. You would create a list of values containing only the number 1, and would set 1 as the default value. You could then write rules that subtract the value of this attribute from a resource called slots-available each time the user picks an expansion card.

- **Range of values.** A range of values is defined by upper and lower limits. Rather than selecting a value, the user enters a value within the range. For example, the attribute Length could have the range 1 inch to 60 inches. When the user configures the product, they would enter a value between 1 and 60 in the field provided.

Attributes that have a range of values domain cannot be used for attribute-based pricing.

Domain Data Types

The data type you specify in the attribute definition determines how the system interprets the values in the domain. For example, you define an attribute with a list of values domain. You define the attribute values to be 1, 5, 10.

The domain of an attribute can be one of the following data types:

- **Boolean.** Use this data type when the user's input is true or false, yes or no. If you specify the Integer data type for these inputs, the system assigns 1 for True or Yes inputs. False and No are assigned 0.
- **Number.** The attribute value can be any positive or negative real number. In Boolean expressions, numbers greater than 0 are interpreted as true.
- **Integer.** The attribute value can be any positive or negative whole number. If a computation results in a fractional amount, the result is rounded to the nearest whole number. In Boolean expressions, integers greater than 0 are interpreted as true.
- **String.** The attribute value can be letters, numbers, or any combination. Attributes with this data type cannot be used as operands in a computation or as the result of a computation. The only arithmetic operator that can be used with this data type is = (equals). For example, you can write rules that test if the user has picked a specific string from a list of values.
- **Date.** The attribute value is interpreted as a date and must be in the correct date format. The system administrator sets date format defaults. Arithmetic computations using dates is not supported. For example, you cannot increase or decrease a date using a computation. All comparison operations are supported for dates. For example, you can compare two dates and determine whether one is earlier than (<), later than (>), or the same as (=) another date. Data type mismatches cause the user's input to be rejected, or can cause indeterminate results. For example, comparing a date data type to an integer data type.
- **Time.** The attribute value is interpreted as a time and must be in the correct time format. The system administrator sets the time format defaults. The time data type has the same restrictions as the Date data type. Data type mismatches cause the user's input to be rejected, or can cause indeterminate results. For example, comparing a time data type to an integer data type.

- **DateTime.** The attribute value is interpreted as both a date and time and must be in the correct format. The system administrator sets the format for this data type. Arithmetic computations using this data type are not supported. For example, you cannot increase or decrease a DateTime value by using a computation. The only comparison operation that is supported is = (equals). Data type mismatches cause the user's input to be rejected, or can cause indeterminate results. For example, comparing a DateTime data type to an integer data type.

Attribute Definition Fields

An attribute definition includes the following fields:

- **Name.** The attribute's name. Use the attribute name to search for the attribute.
- **Data Type.** The types are Boolean, Date, Integer, Number, and Text. The data type refers to how the system will interpret the attribute value.
- **LOV Type.** This field specifies the name of the list of values for attributes with a list of values domain.
- **Default Value.** This field specifies the default value that the customer sees. If you write rules that manipulate the attribute value, the eConfigurator engine can override the default value.
- **Validation.** This field specifies the range of acceptable attribute values. Specify the range using Siebel query-by-example syntax. For example, a component can be purchased in sizes ranging from 1 to 20 inches inclusive. You would specify this range by entering `> = 1 AND < = 20`.

One of the most important uses of the Validation field is to specify the range of acceptable inputs for attributes that have a range of values domain. However, you can also specify a validation expression for list of values domains. For example, you define a list of values that are of type number. This list of numbers may contain numbers that you do not want the user to select. You can create an expression, that limits the choices to a subset of those specified in the list of values.

- **Required.** Enter a Y (yes) or N (no) in this field. When you enter a Y, the field displays a check mark when the record is not highlighted. A Y means the user must choose the attribute value.

- **Display Name.** The attribute name that the user sees. If not specified, the user sees the name specified in the Name field.
- **Unit of Measure.** Select a unit of measure from the drop-down menu. This selection is displayed to the user.
- **Description.** Make an entry in this field to provide the user with a brief description of the attribute. Use this field to provide instructions for entering a value when the attribute has a range of values domain.
- **Hidden.** Prevents the attribute from displaying in Quote, Agreement, Order, or Asset views. Attribute still displays in customizable product selection pages.
- **Search.** A check mark in this field means this attribute and its values can be used in parametric searches. For example, if the attribute is Color, you can search for products that have Color = Red.

Lists of Values (LOV)

When you define an attribute with a list of values (LOV) domain, you must either select an existing list of values or create a new one. A list of values has two parts:

- List of values name, called an LOV type. The LOV type identifies the list of values. The user does not see the LOV type.
- The attribute values in the list. The user selects one of these attribute values or accepts the default value when configuring a customizable product.

To create a list of values, you first create the LOV name. Then you define the attribute values in the list. The attribute value records have the following fields:

- **Type.** The LOV name. This is the name you entered when you created the LOV.
- **Display Value.** The attribute value. This value displays to the user.
- **Language Name.** The language in which the attribute value displays.
- **Order.** The order in which the values are displayed in the drop-down menu the user sees. Assign 1 to the record you want to display first in the menu, 2 to the second record, and so on.
- **Active.** Removing the check mark from this field, removes the record from the list of values. Use this option to temporarily change the number of items in a list of values.
- **Multilingual.** Put a check mark in this field in order to translate the attribute value to the language specified in Language Name.

Hidden Attributes

When you place a check mark in the Hidden field in an attribute definition, the attribute does not display in the Quote, Order, Agreement, or Asset views. For example, if you assign a product to a class that has hidden attribute A1. When you add this product to a quote and select Dynamic Attributes, A1 does not display.

The attribute continues to display in customizable product selection pages and you can write configuration rules on it.

Use hidden attributes to create configuration parameters that customers do not need to see. For example, you could define a hidden attribute whose value is the number of bays required for a chassis. You could then write configuration rules that use the value of this attribute to monitor the number of available bays during a configuration session.

Upgrade users. Use hidden attributes as a replacement for virtual products.

Defining an Attribute with a List of Values Domain

When you define an attribute that has a list of values domain, you must define a list of values. You do this by defining a list of values name, for example Color. Then you create the list of attribute values for Color, for example red, green blue.

In the user interface, this type of attribute displays as an attribute name accompanied by a drop-down menu. The user accepts the displayed default or opens the menu to make a choice.

The LOV Type and Validation fields determine the attribute domain:

- **LOV Type.** Select the list of values definition that you want to use for this attribute. You can also define a new list of values.
- **Validation.** Leave this field blank or enter an expression that restricts the user's choices. Use Siebel query-by-example syntax.
- **Default Value.** Enter the default you want to use from the list of values. This is the item that displays in the attribute field when the list of values menu is closed. If the attribute is required and the user does not change the default attribute, this is the attribute value the user receives. If left blank, no value displays in the attribute field when the menu is closed. The user must open the menu to make a selection. A default value is required if you are using attribute-based pricing.

To define an attribute with a list of values domain

- 1 Navigate to Application Administration > Class Administration.
- 2 Select the desired class.
- 3 In the Dynamic Attributes list, open the menu and choose, New Record.
The Dynamic Attributes form appears.
- 4 Fill out the Dynamic Attributes form and click Save.

Defining an Attribute with a Range of Values Domain

You define a range of values domain attribute by entering an expression in the Validation field. This expression is used to validate the user's input. If the input is within the range (the expression returns a true), the input is accepted. If the input is outside the range (the expression returns a false), the input is rejected and the user receives an error message.

The LOV Type and Validation fields determine the attribute domain:

- **LOV Type.** Leave this field blank.
- **Validation.** Enter an expression that defines the range in Siebel query-by-example syntax. For example, to specify the real numbers between 1 and 100 inclusive, you would enter `> = 1 AND < = 100`.
- **Default Value.** Enter a value from the range in this field if you want to display a default. This attribute value is assigned to every product that inherits the attribute.

To define an attribute with a range of values domain

- 1 Navigate to Application Administration > Class Administration.
- 2 Select the desired class.
- 3 In the Dynamic Attributes list, open the menu and choose, New Record.
The Dynamic Attributes form appears.
- 4 Fill out the Dynamic Attributes form and click Save.

Editing an Attribute Definition

You can edit attribute definitions for both classes and subclasses. When you edit an attribute defined on a class, the attribute definition is changed for all members of the class. This means the attribute definition is changed for all subclasses and all products of the class.

For a subclass, if you edit an inherited attribute, this permanently breaks the chain of inheritance for the fields you edit. Changes to these fields in the parent class attribute definition no longer propagate to the edited attribute. By editing inherited attribute definitions, you can customize the way attribute definitions propagate through the product hierarchy.

For example, you have the class hierarchy in [Figure 4-1](#).

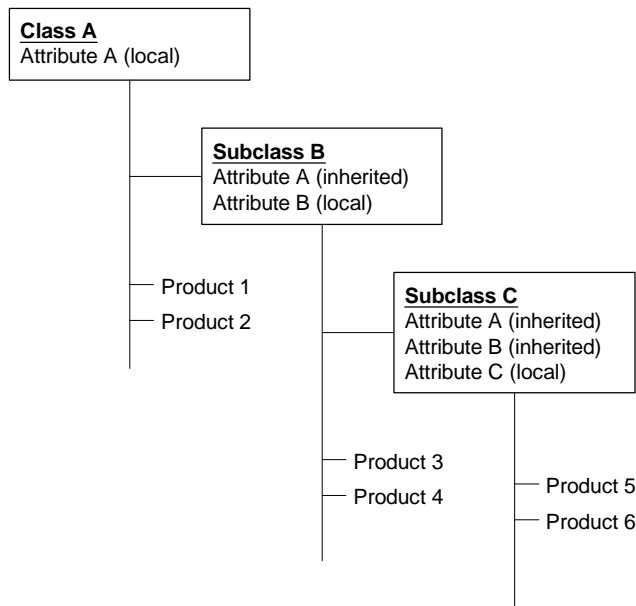


Figure 4-1. Product Class Hierarchy

In Subclass B, you edit the definition of Attribute A by entering a new Default Value. The Default Value field for Attribute A in Subclass B no longer inherits changes from Attribute A in Class A, its parent attribute.

When you edit a local or inherited attribute, the changes propagate to all members of the class or subclass. In the example, the new Default Value propagates to Attribute A in Subclass C.

There are restrictions on which fields you can edit in an inherited attribute definition.

Table 4-1. Editable Fields in a Subclass Inherited Attribute Definition

Field	Editable?
Attribute Name	Yes. Breaks inheritance for all fields. Same as defining new attribute.
Data Type	Yes. Breaks inheritance for all fields. Same as defining new attribute.
List of Values	Yes. Breaks inheritance for this field.
Default Value	Yes. Breaks inheritance for this field.
Validation	Yes. Breaks inheritance for this field.
Required	Yes. Breaks inheritance for this field.
Display Name	Yes. Breaks inheritance for this field.
Parametric Search	Yes. Breaks inheritance for this field.
Unit of Measure	Yes. Breaks inheritance for this field.
Description	Yes. Breaks inheritance for this field.

To edit an attribute definition

- 1** Navigate to Application Administration > Class Administration.
- 2** Select the desired class.
- 3** In the Dynamic Attributes list, select the desired attribute and click Edit.
The Dynamic Attributes form appears.
- 4** Edit the fields in the Dynamic Attributes form and click Save.

Deleting an Attribute Definition

You can only delete an attribute definition from the class on which it is defined. When you delete an attribute defined on a class or subclass, the attribute is deleted from its members as follows:

- The attribute is deleted from all products in the class or subclass.
- The attribute is deleted from all subclasses where the attribute definition has not been edited.
- The attribute is not deleted from subclasses where the attribute definition has been edited.

Before deleting an attribute definition, verify that the attribute is not used in any configuration rules, or for attribute-based pricing.

To delete an attribute definition

- 1** Navigate to Application Administration > Class Administration.
- 2** Select the desired class.
- 3** In the Dynamic Attributes list, click the Menu button and choose Delete Record.
The attribute definition is removed from the Dynamic Attributes list.

Customizing an Inherited Attribute Domain

When you define an attribute on a class or subclass, it is inherited by all member subclasses. If you edit an attribute on the class where it was originally defined, the changes propagate to all member subclasses. The attribute definition is uniform for all subclasses that inherit it.

Subclasses can have two kinds of attributes: local and inherited. A local attribute is one that is defined on the subclass. An inherited attribute is one that is inherited from a parent class.

You customize an inherited attribute domain by editing its definition at the subclass level. When you edit an inherited attribute definition, the changes propagate to all members of the subclass, including other subclasses.

Editing an inherited attribute permanently breaks attribute inheritance for the fields you edit. Editing the domain of an inherited attribute permanently prevents an attribute from inheriting domain changes from its parent attribute.

If you delete the parent class attribute, it is not deleted from subclasses where inheritance is broken. (The attribute definition *is* deleted from all subclasses where inheritance has not been broken.)

For example, you have the class hierarchy in [Figure 4-2](#).

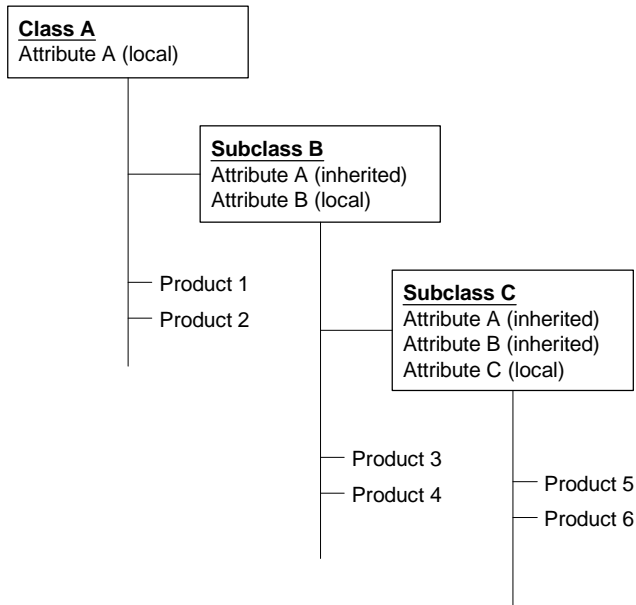


Figure 4-2. Attribute Inheritance

In Subclass B, you edit the domain of Attribute A by entering a new LOV Type and Default Value. The LOV Type and Default Value for Attribute A in Subclass B no longer inherits changes to these fields from Attribute A in Class A, its parent attribute.

When you edit a local or inherited attribute, the changes propagate to all members of the class or subclass. In the example, the new LOV Type and Default Value propagate to Attribute A in Subclass C.

You can edit the domain of an inherited attribute as follows:

- **List of values domain.** Select a different list of values. You can also edit the list of values definition and reapply it. If you want to add or remove items from the list of values, the recommended method is to define a new list of values and apply it.
- **Range of values domain.** Change the expression in the Validation field. Also change the instructions in the Description field.

You can also edit the other fields in the attribute definition, including the Default Value, Validation, Required, Display Name, Parametric Search, and Unit of Measure fields.

Associating Attributes with a Product

To associate attributes with a product, you assign the product to a class or subclass. A product inherits all the attributes of the class or subclass to which it is assigned. You cannot assign attributes directly to a product.

For example, a subclass has six attributes. Three of these are defined on the subclass, and three are inherited from a parent class. When you assign a product to this subclass, the product inherits all six attributes.

To associate attributes with a product

- 1** Navigate to Product Administration.
- 2** Select the desired Product.
- 3** Click in the Class field and open the Pick Class dialog box.
- 4** In the Pick Class dialog box, query for the desired class, and click OK

The class name is added to the product record.

- 5** Save the product record.
- 6** In the More Info menu, choose Dynamic Attributes.

The Dynamic Attributes list appears. This list displays all the product's attributes inherited from its class or subclass.

Viewing a Product's Attributes

A product's attributes are inherited from the class to which it belongs.

When viewing attributes, be careful not to save the attribute records in the Dynamic Attributes list. This sets the attribute value so that it cannot be changed by the user or by configuration rules.

To view a product's attributes

- 1** Navigate to Product Administration.
- 2** Select the desired product.
- 3** Open the More Info menu and choose Dynamic Attributes.

The Dynamic Attributes list appears. This list displays all the product's attributes inherited from its class or subclass.

Changing the Hidden or Required Settings for a Product

When you define an attribute at the class level, you can set the attribute to be hidden or required. Hidden attributes do not display in the Quote, Order, Agreement, or Asset views. Required attributes are those where the user must select a value for the attribute. The value of the attribute cannot be blank.

Attribute definitions propagate automatically to all the products that belong to the product class. However, you can change the Hidden flag and the Required flag settings for an attribute at the product level. This lets you manage the hidden or required settings for attributes product by product.

You can use the hidden setting to simplify your product class system. For example, if a product class has 8 attributes and a product has 7 of these attributes, you can put the product in this class and hide the eighth attribute. You do not have to create a special subclass with 7 attributes for the product.

To change the hidden or required settings for a product

- 1 Navigate to Product Administration.
- 2 Select the desired product.
- 3 Open the More Info menu and choose Dynamic Attributes.

The Dynamic Attributes list appears. This list displays all the product's attributes inherited from its class or subclass.

- 4 Select the desired attribute and click in either the Required or Hidden field.

This adds a check mark to the field, or removes the check mark if one is present.

Setting an Attribute Value for a Product

When the Product Administrator sets the value of an attribute for a product, it cannot be changed by the user. For example, you normally sell keyboards in one of two colors, white and gray. You are temporarily out of stock on white keyboards. The Product Administrator can set the value for the Color attribute to gray.

To set an attribute value for a product

- 1 Navigate to Product Administration.
- 2 Select the desired product.
- 3 Open the More Info menu and choose Dynamic Attributes.

The Dynamic Attributes list appears. This list displays all the product's attributes inherited from its class or subclass.

- 4 Select the desired attribute and enter the desired attribute value in the Value field or select the desired value from the drop-down menu (list of values domain).
- 5 Verify that the value you have set is within the defined domain of the attribute and is the correct data type.

If you enter a value that is outside the domain the eConfigurator engine will accept it unless the attribute definition includes a validation expression. If you enter a value that is the wrong data type (for example, a date when the data type is integer) the resulting engine behavior is indeterminate.

- 6 Click in the Read Only column.

A check mark appears, indicating the attribute value is set and cannot be changed.

To make the attribute value selectable again, click in the Read Only field. This removes the check mark.

- 7 Save the record.

This sets the value of the attribute. A check mark displays in the Read Only field. The value cannot be changed by the user.

Creating a List of Values (LOV)

When you define an attribute that has a list of values domain, you must specify a list of values name. This LOV contains the attribute values.

Creating a list of values has two steps:

- a Creating a list of values name.
- b Defining the attribute values in the list of values.

Creating a List of Values Name

You create an LOV name by creating a new record in the dialog box where you select an LOV when defining an attribute.

After creating a list of values name, you define the attribute values that make up the list.

To create a list of values name

- 1 Navigate to Application Administration > Class Administration.
- 2 In the Classes list, query for the desired class.
- 3 In the Dynamic Attributes list, select the attribute for which you want to define an LOV.
- 4 Open the Dynamic Attributes menu and choose Edit Record.

- 5 Click the button next to the LOV field.

A dialog box appears for selecting LOVs.

- 6 In the dialog box, click New and create a new LOV name. Close the dialog box.

This transfers the new LOV name to the attribute record.

Defining the Attribute Values in a List of Values

After you define the LOV name, you create the values in the list, by creating a record for each attribute value.

Do not define LOVs for product classes in the Application Administration > List of Values view. This view does not display LOVs defined for product classes.

To define the attribute values in the list

- 1 Navigate to Application Administration > Class Administration.

- 2 In the Classes list, query for the desired class.

- 3 In the Dynamic Attributes list, select the attribute for which you want to define LOV values.

- 4 Click the LOV name hyperlink in the LOV Type field.

A view appears that contains the product class LOV types that were defined in this view. This view does not display LOV types that were defined in Application Administration > List of Values view.

- 5 In List of Values-Type, query for the desired list of values name.

The values defined for the list of values name, display in List of Values.

- 6 For each value in the list create a new record in List of Values.

Editing a List of Values Definition

You can edit all the fields in a list of values definition. These changes propagate to all the locations where the list of values is assigned. When editing a list of values record, keep in mind the following effects:

- If you edit the Type (name), this changes the list of values to which the record belongs. In the user interface, this means the item moves from one list of values menu to another.
- If you edit any fields besides Type, the changes affect only the list of values to which the record belongs. For example, the list of values Color has three records. The display names are Red, Green, Blue. You change the display value for the first record from Red to Purple. For each attribute to which the list of values is assigned, the list of values is now Purple, Green, Blue.

When modifying a list of values record, observe the following guidelines:

- **Display Value.** Edit this field to change the name of a menu item in the list of values.
- **Language Name.** Edit this field to change the language in which the item displays. The language name for all records in a list of values should be the same.
- **Order.** Edit this field to change the order in which the values are displayed in the drop-down menu the user sees. Assign 1 to the record you want to display first in the menu, 2 to the second record, and so on.
- **Active.** Removing the check mark from this field, removes the record from the list of values. Use this option to temporarily change the number of items in a list of values.
- **Translate.** Put a check mark in this field in order to translate the menu item to the language specified in Language Name.

Several other fields are also included in the record used to define a list of values record. These fields are not meaningful for product management or pricing management.

To edit a list of values definition

- 1** Navigate to Application Administration > Class Administration.
- 2** In the Classes list, query for the desired class.
- 3** In the Dynamic Attributes list, select the attribute for which you want to edit LOV values.
- 4** Click the LOV name hyperlink in the LOV Type field.

A view appears that contains the product class LOV types that were defined in this view. This view does not display LOV types that were defined in Application Administration > List of Values view.

- 5** In List of Values-Type, query for the desired list of values name.
The values defined for the list of values name display in List of Values.
- 6** Edit the list of values records as desired and click OK.

Deleting a List of Values

You cannot delete a list of values name (Type) or its records. However, you can edit all the fields in a list of values record, including changing its name. This has the same effect as deleting the record.

Product Attributes

Deleting a List of Values

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About This Chapter

You can specify language translations for product-related data the user sees when creating a quote or purchasing a product from an eSales Web site. This chapter describes what product data can be translated and how to specify the translations.

What Can Be Translated?

For both simple and customizable products you can specify language translations for the following data:

- Product description
- Product class display name
- Class display name
- Attribute display name
- Attribute description
- Attribute list of values

How Does Multilingual Data Translation Work?

The workflow for translating each of the types of product data is the same. The Product Administrator selects the desired item, selects a language, and then enters the translation for the item. This creates a record containing the translation. The Product Administrator can create multiple translation records for an item.

When the user logs in to either Quotes or to an eSales Web page and specifies a language, they see the item translations for that language entered by the Product Administrator.

In some cases, the applets that display items that can be translated include a field called Translate. This field is unrelated to setting up data for multilingual translation and should be ignored.

Translating the Product Description

Use this procedure to translate the product description.

To translate the product description

- 1** Navigate to Product Administration.
- 2** Select a product whose description you want to translate.
- 3** Open the More Info menu and choose Translations.

The languages list appears. If you have not selected any languages, the list is empty.

- 4** Add a new record.
- 5** Click in the new record's Code field and select a language code from the Language Name dialog box.

The record is updated with the language name and language code.

- 6** Enter the translation of the description in the Description field, and then click Save.

A new record, containing the translation appears in the languages list.

Translating a Class Display Name

Use this procedure to translate the display name for the product class.

To translate a class display name

- 1** Navigate to Application Administration > Class Administration.
- 2** Select the product class display name you want to translate.
- 3** Click the Class Translations tab.
- 4** In the Class Translations tab, click New.

A new record displays.

- 5** Click in the new record's Code field and select a language code from the Language Name dialog box.

The record is updated with the language name and language code.

- 6** Enter the translation of the display name in the Display Name field, and then click Save.

The record is updated and displays the translation of the class display name.

- 7** Repeat these steps to create additional language translations for the class display name.

Translating an Attribute Display Name and Description

Use this procedure to translate both the display name for an attribute and its description.

To translate an attribute display name and description

- 1** Navigate to Application Administration > Class Administration.
- 2** Select the product class where the attribute you want to translate is defined.
- 3** In Dynamic Attributes, select the attribute you want to translate.
- 4** Click the Attribute Translations tab.
- 5** In the Attribute Translations tab, click New.
A new record displays.
- 6** Click in the new record's Code field and select a language code from the Language Name dialog box.
The record is updated with the language name and language code.
- 7** Enter the translation of the display name in the Display Name field.
- 8** Enter the translation of the description in the Description field.
- 9** Click Save to save the record.
The record is updated and displays the translations.
- 10** Repeat these steps to create additional language translations for this attribute's Display Name and Description.

Translating an Attribute List of Values

For attributes with a list of values domain, you can translate the list of values. Use the following workflow to do this:

- a** When you define the list of values type in the List of Values dialog box, put a check mark in the Multilingual field.
- b** In the List of Values view, create a set of records for each language as follows:
 - Type.** Choose the list of values name.
 - Display Value.** Enter the translation of the item.
 - Language Independent Code.** Enter the item name. This name is used to match the translations to the items.
 - Language Name.** Select the language.
 - Multilingual.** Place a check mark in this field.

For example, you define a list of values called Color. It has three values, Red, Green, Blue. Your base language is English and you want to translate the list of values to French.

When you define the list of values in the List of Values dialog box, you would place a check mark in the Multilingual field. In the List of Values applet, you would first define three records, one for each color, and specify English-American as the language. You would choose Color as the Type. In the Display Value and Language independent Code fields, you would enter the color name in English: Red, Green, and Blue respectively.

Then you would create three additional records, one for each color. You would choose Color as the Type. In the Language Independent Code field, you would enter Red, Green, Blue. In the Language Name field, you would choose French. In the Display Value field, you would enter Rouge, Vert, and Bleu as the Display Value respectively.

For additional information on creating and managing multilingual lists of value (MLOVs), refer to the *Global Deployment Guide, MidMarket Edition*.

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