

Siebel Application Window

Application-level menu.

Click the **Show drop-down list** to filter records in a screen.

Click the **History list** to access previously used screens and views.

Click the **ascending/descending arrows** to sort a column. Green indicates active sort.

Click the **Queries drop-down list** to access saved queries.

Click the **search button** to open the Search Center.

Click a **screen tab** to access the corresponding screen.

Click the **menu button** to access menu options for the active record in a form or list.

Click the **record navigation buttons** to navigate to the next or previous record in a form or list.

Click a **view tab** to access more information about a selected record.

Click the **tab jump buttons** to scroll through view tabs or screen tabs.

Click the **column navigation arrows** to see additional columns.

Click the **show more button** to expand or collapse a form or list.

A **list** consists of records shown as rows.

A **form** shows the details for an individual record.

Contacts List:

New	Last Name	First Name	Mr/Ms	Work Phone #	Job Title	Email	Account	Site	Country
*	Akana	Wanda	Mrs.	(514) 555-2504	Manager IT	Wanda_Akana@bell	Bell Canada	Toronto, ON	Canada
*	Akber	Mary	Ms.	(847) 555-7601	Senior IT Manager	mary_akber@caterpillar	Caterpillar	Chicago	USA
*	Aker	Charles	Mr.	(312) 555-0900 x22	Inforte	Aker_Charles@manulife	Manulife Financial	Hq, Toronto, On/Car	Canada
*	Akhurst	Steven	Ing.	+395559002560	Purchase Dept. - IT	Steven_Akhurst@mm			Italy
*	Akin	Brian	Mr.	(651) 555-9301		Brian_Akin@mmm.c			USA
*	Alabach	Mike	Mr.	(416) 555-6517	Developer, Support	Mike_Alabach@tdx			Canada
*	Alacon	Terry	Ms	(415) 555-7834	Manager, IT	Terry_Alacon@twir	Tower Industries	Menlo Park	USA

Form Fields:

- Last Name: Akana
- First Name: Wanda
- Work Phone #: (514) 555-2504
- Cellular #: (416) 364-2928
- Email: Wanda_Akana@bell.ca
- Mr/Ms: Mrs.
- Organization: Siebel Americas
- Contact Team: SADMIN
- Contact Method: [Dropdown]
- Work Fax #: (514) 555-4391 x3440
- Account: Bell Canada
- Site: Toronto, ON
- Assistant Name: [Field]
- Assistant Phone #: [Field]

Navigation

Screen tabs. Screen tabs are located at the top of the application window and represent the main screens in your application. Click a screen tab to access the corresponding screen.

Site Map. The screen tabs that appear within the application window are determined by your organization. These tabs may represent only a subset of all screens. To access all available screens, use the Site Map (View > Site Map). The Site Map provides hyperlinks to all screens and views.

Show drop-down list. After clicking a screen tab, use the Show drop-down list to filter the set of records in the screen. For example, to see all contact records, click the Contacts screen tab and select All Contacts from the Show drop-down list. The records appear in a list.

View tabs. Use view tabs after you have selected a record in a list. Click a view tab to see additional information related to the selected record.

Subview. Subviews display additional detail about a record selected within a view. Subviews appear directly below a view. *Not all views have subviews.*

NOTE: Use the tab jump buttons, at each end of the visible screen tabs or view tabs, to access additional tabs.

Records and Fields

A record is a collection of data organized into fields. For example, a contact record consists of fields such as name, work phone, job title, and email address; a service request record consists of fields such as defect number, type, severity, and priority.

- In a list, records are shown as rows.
- A form displays the fields of a single record.
- You can add a record by clicking the New button in a list or form, or by clicking the menu button in any list or form and clicking New Record.

Click in a field to enter or edit text in the field. Lists and forms contain field controls for adding data. Required fields in a record contain a red asterisk. Required fields must be filled in before you can save the record.

Field Control	Purpose
	Click the drop-down arrow to select from a list of values.
	Click the select button in a field to access a dialog box that provides a list of items that have already been stored in the database. Select an item to fill in the field.
	Click the calendar button in a date field to access a dialog box for entering date and time information.
	Click the calculator button in a field to access a calculator.

Saving Data

When you create new records or make changes to existing records, you should save your changes.

In a list. If you “step off” (leave) the record, your changes will automatically be saved. You can also click the menu button, then click Save Record; or, from the application-level menu, you can choose File > Save Record.

In a form. If you “step off” (leave) the record, your changes will automatically be saved. You can also click the menu button and then click Save Record; or, from the application-level menu, choose File > Save Record.

Undoing changes. If you have not saved your changes, click the menu button, then click Undo Record.

Searching

The Search Center lets you search for data within your application without losing the current information displayed on your screen.

To create a search



- 1 Click the search button.
- 2 From the Look In drop-down list, select the data type for your search.
- 3 Enter your search criteria in the fields provided. *Different fields appear, depending on your selection from the Look In drop-down list.*
- 4 Click Search.

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

Select a record in the Results list and do one of the following:

- Click Preview to view the record in a separate dialog box.
- Click the hyperlink for the record to show the record in the application window.

Querying

The query feature allows you to enter specific query criteria to find records. Operators are used to help define the criteria. Operators are used within a string of text or numbers you are using to locate specific records. See the bookmark insert for a query operator reference. Additional operators can be found in *Online Help* (CTRL + ALT + H).

To create and run a query in a form or list

- 1 Click Query in the form or list.
- 2 Enter query criteria in the blank form or list row.
- 3 Click the menu button, then click Run Query.

To save the query criteria

- 1 Create and run the query.
- 2 From the application-level menu, choose Edit > Query > Save As.
- 3 In the Save Query As dialog box, type a name in the Query Name field, and click OK.

Organizing Columns

- You can resize a column by moving your cursor over the line between the column headers. The cursor changes to a down arrow. Click and drag the border until the column is the desired size.
- Use the Columns Displayed feature to add and remove columns. Click the menu button, then Columns Displayed, to access the Columns Displayed dialog box. Use the arrow buttons to add or remove columns.

SIEBEL® 7 FUNDAMENTALS QUICK REFERENCE, MIDMARKET EDITION

Overview

This quick reference provides fundamental information on the use of the functionality in any Siebel 7 application. See *Fundamentals, MidMarket Edition* or *Siebel Online Help* for a further explanation of these topics and other basic features of Siebel 7 applications.

Home Page

The first screen you see when you log in to your Siebel application is your home page. Your job responsibilities determine what you see on that page.

Your home page provides information to assist you with your daily activities. You can remove or rearrange the elements of the home page. Use the controls in the table below to customize your home page.

Home Page Control	Purpose
	Click to collapse the list or form to its minimum size, showing no records.
	Click to expand the list or form to its standard size.
	Click to move the list or form up on the page to reposition it above other lists or forms. <i>You can access this control only by clicking the Edit Layout button.</i>
	Click to move the list or form down on the page to reposition it below other lists or forms. <i>You can access this control only by clicking the Edit Layout button.</i>
	Click to hide the list or form and temporarily remove it from the home page.
	Click to show the list or form previously hidden in the home page. <i>You can access this control only by clicking the Edit Layout button.</i>

User Preferences

User preferences allow you to set preferences related to the functionality and appearance of your application. Access your user preferences by choosing View > User Preferences from the application-level menu. The following are two of the preferences you can change. You may not be able to change certain fields; contact your Siebel administrator for more information.

Profile. Use the Profile screen to change contact information, position and responsibility, notification preferences, and so on.

Setting a Query Default. You can define a default query for each screen so that when you access that screen, that query is applied to the data in that screen. Before selecting a default query for a screen, you must first run and save the query. Then access the User Preferences screen. From the Show drop-down list, select Default Queries. Find the screen using the Screen Name list and the Screen View list, then use the Default Query field to select the query.