



SIEBEL⁷
eBusiness

QUICKSTART GUIDE

MIDMARKET EDITION

eBUSINESS APPLICATIONS

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QuickStart Guide

As a busy professional, you need to know how to use your Siebel application as soon as possible. This *QuickStart Guide, MidMarket Edition* gives an overview of the basic concepts you need to know right away. A business scenario is used to guide you through a typical day in which you use your Siebel application to complete your job successfully. You can follow the business scenario to learn how some of your key tasks can be completed using your Siebel application.

This guide introduces you to your Siebel application and is meant to make you feel more comfortable using it. If you find that you need more detail on anything discussed in this guide, see *Fundamentals, MidMarket Edition*. You can also access *Siebel Online Help* by clicking Help > Contents in the application-level menu in your Siebel application.

NOTE: Your Siebel application may not have all the features described in this guide, depending on which software modules you have purchased. See your system administrator for more information.



Starting Your Day

Your work day is just beginning. Grab your coffee and let's get started!

Logging In

As you begin your day, the first thing you will do is log in to your Siebel application.

Enter your user ID and password in the User ID and Password fields.

Click Log In to log in.

The image shows the Siebel Sales 7.0 login interface. At the top, there is a globe graphic and the Siebel 7 eBusiness logo. Below this, the text "Siebel Sales 7.0" is displayed. The login form consists of two input fields: "User ID:" and "Password:". A red oval highlights these two fields. Below the input fields, there is a checkbox labeled "Remember my User ID and Password" and a "Log In" button with a green arrow. A red arrow points from the "Log In" button to the text "Click Log In to log in." in the left margin. Another red arrow points from the text "Enter your user ID and password in the User ID and Password fields." to the input fields. At the bottom left, there is a copyright notice: "© 1990-2001 Siebel Systems, Inc. All rights reserved. This program is protected by U.S. and international law, and, if provided to the U.S. Government, shall be provided with 'Restricted Rights,' as described in About Siebel." A red arrow points from this notice to the "Log In" button.



Your Home Page

After you log in, you will see your home page.

Links to the screens you use most often allow you to get to work immediately.

Your calendar allows you to view your tasks and appointments in a daily, weekly, or monthly format on the home page.

The screenshot shows a CRM home page with a navigation bar at the top containing tabs for Home, Accounts, Contacts, Households, Employees, Service, Assets, Orders, Campaigns, Opportunities, Quotes, and Communications. Below the navigation bar is a welcome message for Seth Murphy dated Tuesday, August 21, 2001. The main content area is divided into three sections: My Activities, My Service Requests, and My Opportunities. A 'My Calendar' widget is positioned on the right side of the page, displaying a daily view for Tuesday, 8/21/2001, with a list of tasks and appointments.

Due	Type	Description	Priority
	Call - Outbound	Call prospect Anne Stone	3-Medium
	Appointment	Weekly status meeting with manager	3-Medium

New	SR #	Summary	Account	Priority
	1-3675307	Test Asset record	Avaya Communications	Medium
	1-3675313	Test Asset Record 2	3Com	Medium
	1-3684308	Test Asset 3	Hitech Manufacturing	Medium
	1-3900973	Workflow Test		Low
	2-1CR	Errors during upgrade process	3Com	Medium

Name	Account	Sales Rep	Sales Stage	Revenue Prob %	Close Date
------	---------	-----------	-------------	----------------	------------

My Calendar
Owner: Seth Murphy
Date: Aug 21 2001
Time Zone: (GMT-08:00) Pacific Time (US & Can.)
Today Weekly Monthly
Tuesday 8/21/2001
8:00 AM
9:00 AM
10:00 AM
11:00 AM Call prospect Anne Stone
12:00 PM
1:00 PM
2:00 PM
3:00 PM Weekly status meeting with manager
4:00 PM
5:00 PM
6:00 PM

Today's calendar shows a few key events for which you need to prepare. You decide to navigate to the Calendar screen to examine your tasks in more detail.



Tip: If there is an appointment or activity you would like to examine further, you can click that item in the calendar to jump directly to details.

For further information on the home page, refer to *Fundamentals, MidMarket Edition*.



Navigating to the Calendar Screen

Use the screen tabs at the top of your application to go to the Calendar screen.

Click the Calendar screen tab to access your calendar.



Managing Your Data

According to your calendar, you have two important appointments for today. The first is with a prospective client you met yesterday at a trade show. The second is with your manager, who wants to know which of your company's accounts in California have a potential volume that is above \$50,000. You decide to prepare for the call to the prospective client first, because it is scheduled first.

Drill down on the appointment if you want to view more details.


The screenshot shows a calendar interface with the following elements:

- Navigation tabs: My Daily (selected), My Weekly, My Monthly
- Buttons: New, Print, Go, Today
- Calendar title: Tuesday 8/21/2001
- Owner: Seth Murphy
- Time Zone: (GMT-08:00) Pacific Time (US & ...)
- Date: Aug 21, 2001
- Appointment list:
 - 8:00 AM
 - 9:00 AM
 - 10:00 AM
 - 11:00 AM: Call prospect Anne Stone
 - 12:00 PM
 - 1:00 PM
 - 2:00 PM
 - 3:00 PM: Weekly status meeting with manager
 - 4:00 PM
 - 5:00 PM
 - 6:00 PM

You met the prospective client, Anne Stone, at a trade show yesterday, and you are not sure if she is in your company's database. However, you think that her company may already be listed as one of your accounts. She requested hardware pricing information from you, and you promised to follow up with her today.

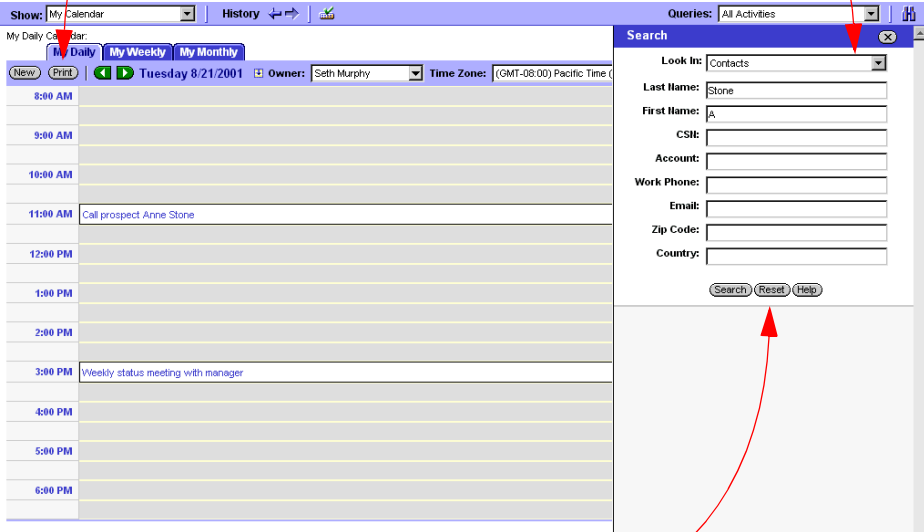


Searching the Database

The first thing you do is search the database to see if Anne Stone is already entered as a contact. Click the search button  to open the Search Center.

The screen that you were working in before opening the Search Center remains in view.

Select the type of data you are searching for in the Look In drop-down list.

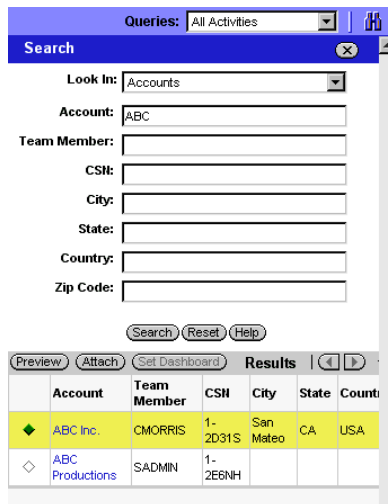


The screenshot shows a software interface with a calendar on the left and a search form on the right. The calendar is titled "My Daily Calendar" and shows a weekly view for Tuesday, 8/21/2001. The search form is titled "Search" and has a "Look In:" dropdown menu set to "Contacts". The form includes fields for "Last Name" (Stone), "First Name" (A), "CS#", "Account", "Work Phone", "Email", "Zip Code", and "Country". At the bottom of the form are buttons for "Search", "Reset", and "Help". Red arrows point from the text above to the search icon and the "Look In:" dropdown menu.

Enter your search criteria and click Search. You can also click Reset to start over with blank fields or Help to launch the online help.



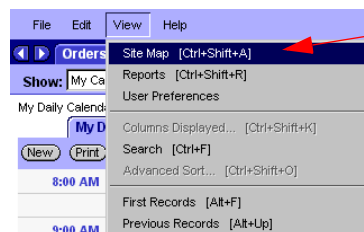
Tip: Entering only an A in the First Name field returns every contact in the database with a last name of Stone and a first name that begins with A. Therefore, you do not need to know how Anne spells her first name in order to locate her contact record.



The search produces no contacts named Anne Stone. To begin a search for ABC Productions, click Reset and choose Accounts from the Look In drop-down list. An account record does indeed exist for this company. You decide to add Anne as a new contact and associate her with ABC Productions at the same time. Click the close search button to close the Search Center.

Using the Site Map

Use the Site Map to navigate to the Accounts screen. To get to the Site Map, use the application-level menu.



Choose View > Site Map from the application-level menu to get to the Site Map. The application-level menu is accessible from every screen.

The Site Map shows a hyperlinked list of every screen available to you in your application.



Managing Your Data

Click Accounts to display views available in that screen. Click My Accounts to navigate to the My Accounts view in the Accounts screen.

Accounts	Fulfillment	Resolution Documents
Activities	Fund Requests	Responses
Agreements	Group Administration	Revenues
Alert Administration	Home	Runtime Events Administration
Application Administration	Integration Administration	Sales Quota Administration
Assets	List Management	Sales Quotas
Assignment Administration	Literature	Search Administration
Business Service Administration	Market Development Fund Administration	Server Administration
Calendar	Market Development Fund Requests	Server Component Requests
Campaign Administration	Marketing Administration	Service Administration
Campaigns	Messages	Service Requests
Catalog Administration	Opportunities	Siebel Anywhere Administration
Category	Orders	Siebel Remote Administration
Communications Administration	Partners	Siebel Workflow Administration
Communications	Personalization Administration	Solution Administration
Competitors	Pricing Administration	Solutions
Contact Us	Pricing	Time Sheets
Contacts	Product Administration	User Administration
Correspondence	Products	User Preferences
Data Administration	Projects	Web Browser Administration
Document Administration	Quality	
Employees	Quotes	
Entitlements	Reports Server	
Expense Reports	Resolution Documents Administration	



- **Accounts**
 - All Accounts
 - Explorer
 - My Accounts
 - My Team's Accounts

Adding a Contact

Find the ABC Productions account record in the Accounts screen and select it.

Click the Contacts view tab to add Anne as a new contact and associate her contact record with the account record.

The screenshot shows the Siebel Accounts screen. The 'Contacts' tab is selected, and the 'Add' button is highlighted with a red arrow. The 'New' button is also visible. The 'Add' button is located in the top left corner of the Contacts view. The 'New' button is located in the top right corner of the Contacts view. The 'Add' button is located in the top left corner of the Contacts view. The 'New' button is located in the top right corner of the Contacts view.

New	Last Name	First Name	Mr/Ms	Work Phone #	Job Title	Email
	Stone	Anne	Ms.	(800) 777-8999	Director of Purchasing	astone@abcprod.com

Clicking Add in the Contacts view launches a dialog box in which to search for existing contacts.

Since Anne is not an existing contact, click New in the dialog box. This inserts a blank record in the Contacts view where you can enter Anne's information. The record is saved when you step off of it or when you navigate to another screen or view.



Tip: You could have added Anne as a new contact from the Contacts screen instead of the Accounts screen. Both methods will commit Anne's contact record to the database. There is often more than one way to complete a task in your Siebel application.



Creating an Attachment

Anne wanted to know about hardware pricing. Attaching the price list to her contact record will be useful so that you can access it easily when you speak with her.

Use the Attachments view in the Contacts screen to attach the price list to Anne's contact record.

The screenshot shows a contact record for Anne Stone. The 'Attachments' tab is selected, displaying a table with the following data:

Attachment Name	Size (In Bytes)	Type	Modified	Update File	Comments
2001 Price List	1,181	xls	11/5/2001 2:15:37 P	✓	

Click the 2001 Price List hyperlink in the Attachment Name column to launch the price list after you add it.

Performing a Query

Your call to Anne Stone is not until 11 a.m. You can find the information requested by your manager in the meantime. Performing a query would be the best way to locate all of the accounts in California with a potential volume that exceeds \$50,000. Click the menu button and choose New Query in the Accounts screen to launch a blank query.

Enter your query information in the list or form provided, click the menu button, and choose Run Query.

Accounts

New Query 1 - 5 of 5 Query Results

New	Name	Site	Main Phone #	Territories	Industries	Status	URL
*	Acer America, Inc.	San Jose, Ca	(773) 329-5555		computer & software stores	Current Customer	www.acer.com
	Berkeley Asset Management	Berkeley	(510) 524-1000		building maintenance services	Active	
	Service.com	Headquarters	(650) 329-6500		manufacturing industries	Active	www.service.com
	State Machines, Inc.	Cupertino	(408) 734-4411		management consulting services	Active	www.statemcs.com
	Tower Industries	Menlo Park	(650) 584-1000		real estate agents & managers	Active	www.towerinc.com

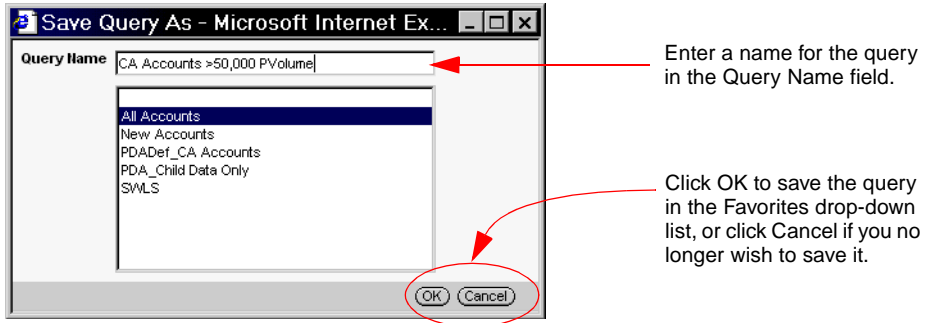
The query results are returned in a list. If you see a form instead of a list, click the More Info tab to view the results in list format.



Tip: If you cannot locate the field you wish to query, you probably launched the query from a collapsed form. Click Cancel to return to the form, and click the show more button on the form to expand it. Start a new query and the field should be available.



You can save this query and use it again. To save the query, choose Edit > Query > Save As from the application-level menu. This launches the Save Query As dialog box.

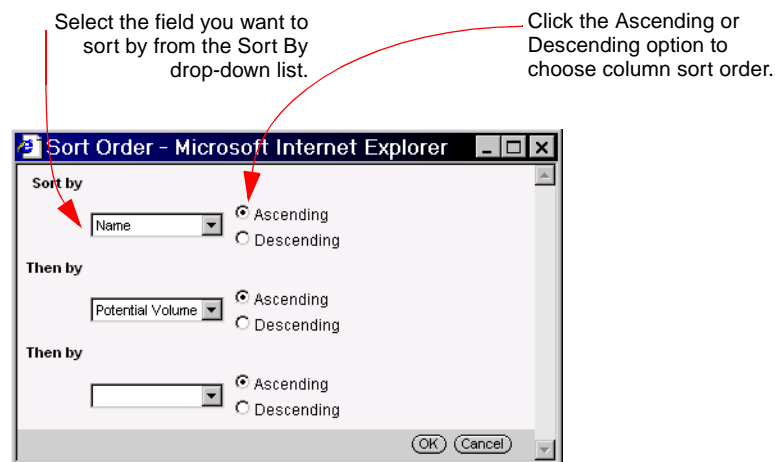


Now, you will be able to access the query any time you want from the Favorites drop-down list in the Accounts screen.

For more information on creating queries, see *Fundamentals, MidMarket Edition*.

Sorting Records in a List

Sorting the results returned by the query makes it easier to view the results. Whenever many records are returned by a query, it is a good idea to sort them in an order that makes sense for you. In this case, sorting the records by name and then by volume allows you to keep your results organized. Click the menu button and choose Advanced Sort to launch the Sort Order dialog box.



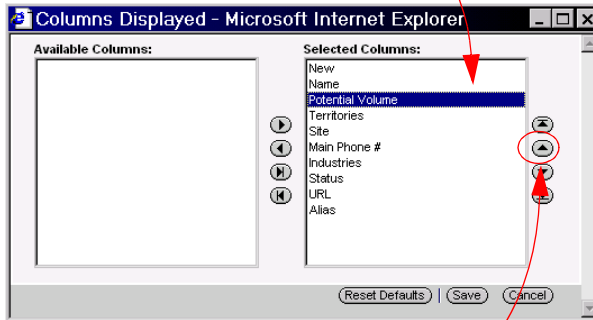
Tip: An ascending sort will organize records from A to Z; a descending sort will organize records from Z to A.



Using Columns Displayed

You are still not satisfied with the way in which the results are being displayed on the screen. The information you are interested in is too far apart on the screen. You would like to position the Name column next to the Potential Volume column so you can get a better understanding of the query results. Click the menu button and choose Columns Displayed to launch the Columns Displayed dialog box.

First, click the Potential Volume column to select it.



Second, click the column move up button as many times as needed to get the Potential Volume column where you want it.

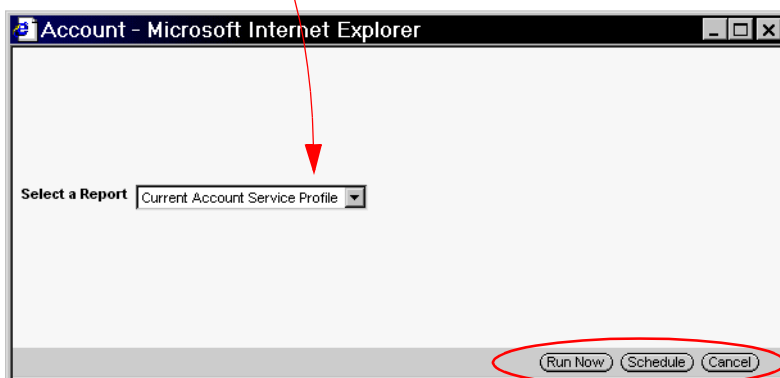


Tip: The Available Columns section shows the columns that are not currently being displayed in the list. The Selected Columns section shows the columns currently being displayed in the list.

Running a Report

You can provide your manager with the requested data more conveniently by running a report. Your manager can refer to the report whenever necessary, and the data will be clear and concise. To create the report, choose View > Reports from the application-level menu to open the Reports dialog box.

The Select a Report drop-down list contains the reports available for the screen. Each screen has different reports available.



Click Run Now to execute the report, click Schedule to run at a later time, or click Cancel if you no longer want the report.



Managing Your Data

Select Account List from the drop-down list and click Run Now. Because you ran a query, the report will not show all accounts, but only the ones found by your query. The report appears in the Siebel Report Viewer.

Click the print button in the Siebel Report Viewer to create a printable PDF of the report.

The screenshot shows a Microsoft Internet Explorer window titled "Accounts - Microsoft Internet Explorer". The browser's address bar shows "Page 61 of 64" and "75%". The main content area displays the "Account List" report from Siebel. The report lists three accounts:

- A. K. Parker Distribution**: Location: San Francisco, Main Phone No.: (800) 555-8798, Main Fax: [blank].

Address	Comments	Acct Type	Status	Industry	Parent Acct	Synonyms
678 Main St. San Francisco CA 94102 USA		Customer	Active			
- Computer Resellers Inc.**: Location: San Francisco, Main Phone No.: (800) 999-9999, Main Fax: [blank].

Address	Comments	Acct Type	Status	Industry	Parent Acct	Synonyms
8900 Esplanade San Francisco CA 94133 USA						
- Green Industries Ltd.**: Location: Los Angeles, Main Phone No.: (510) 555-9898, Main Fax: [blank].

Address	Comments	Acct Type	Status	Industry	Parent Acct	Synonyms
70 Treble Way Palo Alto CA 94301 USA		Customer				

For more information about reports, see *Fundamentals, MidMarket Edition*.

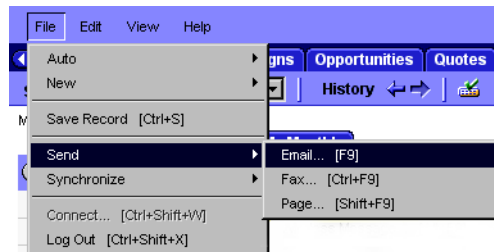


Contacting Your Clients

It is almost time for your 11 a.m. meeting with Anne Stone. To make sure that Anne has not forgotten about the appointment, send her a reminder email from your Siebel application.

Sending an Email

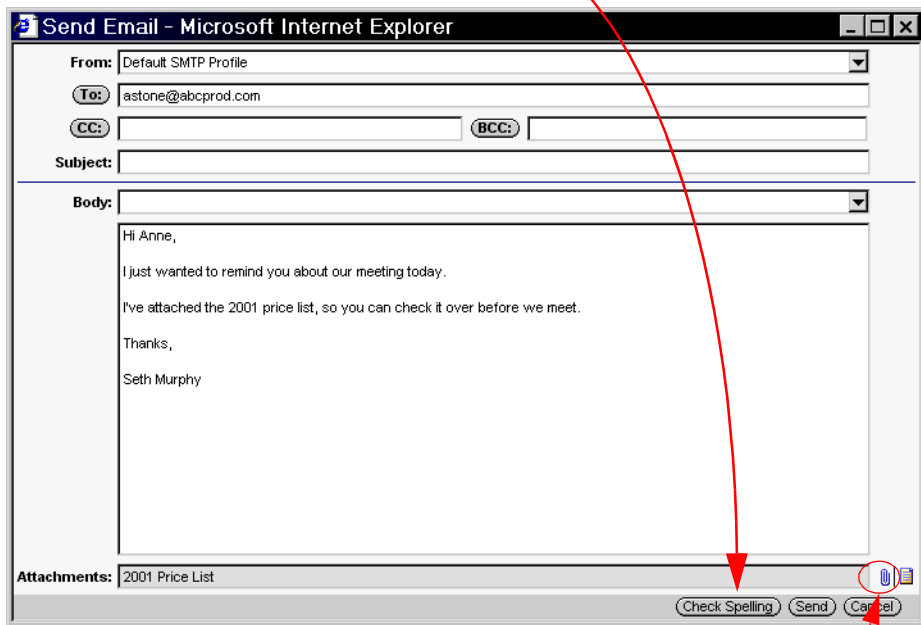
To send an email, choose File > Send > Email from the application-level menu.





This command launches the Send Email dialog box. Create the reminder email for Anne directly from the Send Email dialog box. If you launch the email from Anne's contact record, her email address is automatically entered in the To field. The address will not be filled in automatically unless you included Anne's email address in her contact record.

Click Check Spelling to make sure there are no spelling errors in your email.



Click the add attachment button to attach the price list to the email.



Tip: You can send faxes directly from the application in the same way you sent this email. The path from the application-level menu is File > Send > Fax.



Adding an Appointment

Finally, you are ready to phone Anne. During the call, you make an appointment for next week to follow up on the price list and possible order from her company.

Click the Activities view tab to create the appointment with Anne. After you create it here, it remains associated with Anne and also appears in your Activities list and calendar.

The screenshot shows a CRM interface for a contact named Anne Stone. The contact details are as follows:

*Last Name: Stone	Work Phone #: (800) 777-8899	Mr./Ms.: Ms.	Account: ABC Productions
*First Name: Anne	Address Line 1: 	City: 	Site: San Francisco
Middle Initial: 	Address Line 2: 	State: 	Email: astone@abcprod.com
Job Title: Dir of Purchasing	ZIP: 	Country: 	Never Email: <input type="checkbox"/>

Below the contact details is a navigation bar with tabs: More Info, Accounts, **Activities**, Campaigns, Campaigns - Admin, Notes, Opportunities, Profile, Responses, Responses - Admin, Service Request. The 'Activities' tab is selected, and a red arrow points to it from the text above.

Below the navigation bar is a table of activities:

New	Planned Start	Type	Description	Account	Priority	Employees
*	8/29/2001 2:30:00 P	Appointment	Follow up with Anne to get her	ABC Productions		SMURPHY



Customizing Your Application

With many of your key tasks behind you now, you can spend some time customizing your Siebel application.

Customizing the Home Page

When you used your home page this morning, you noticed that you could not access the Accounts screen from it. You use the Accounts screen frequently, so you would like to add it to your home page. Click Edit Layout on your home page to do this. Clicking this button takes you to the Edit Layout page. From here, you can select what you would like to show on your home page and what you would like to hide.

Click Done to save your changes or click Default Layout to revert to the default home page.

Click the show button in the My Accounts tab to have this tab appear on your home page.

These buttons allow you to collapse and expand a section, move a section up or down, show a section, or hide a section on the home page.

For more information about the Edit Layout page, see *Fundamentals, MidMarket Edition*.



Tip: The sections that appear in the Edit Layout view are the only ones available to add to your home page.



Customizing Your Calendar

You would also like to change your calendar. Your hours tend to fluctuate, so you would like your calendar to start at 8 a.m. in the morning and finish at 8 p.m. in the evening to accommodate your work day. From the application-level menu, choose View > User Preferences to access the User Preferences screen.

Click the Calendar tab in the User Preferences screen to access calendar options.

The screenshot shows the 'User Preferences' screen with the 'Calendar' tab selected. The 'End Day At' field is highlighted with a red arrow. The 'Start Day At' field is set to 8:00:00 AM and the 'End Day At' field is set to 7:00:00 PM. Other fields include 'Set Alarm' (5), 'Appointment Duration (in Minutes)' (30), and 'Start Day At' (8:00:00 AM).

Profile	Availability	Behavior	Calendar	Change Position	Communications	Correspondence	Data Quality	Search	Spelling	Expense Reports
Query	Save	1 of 1+								
Set Alarm:	5	Start Day At:	8:00:00 AM	End Day At:	7:00:00 PM					
Appointment Duration (in Minutes):	30									

Change the time your calendar ends in the End Day At field.



Leaving for the Day

Your day is now complete, but before you leave, there are a few loose ends you need to tie up.

Tracking Your Activities

You would like to take a look at your activities to make sure everything is up to date. To do this, navigate to the Activities screen.



Click My Activities in the Show drop-down list to view your activities.

The first thing you need to do is change the status of the two meetings you had today.

To change an activity's status, click in the record's Status field and select a status from the drop-down list that appears.

New	Planned Start	Type	Description	Status	Priority	Repeat
	09/21/2001 4:59 PM	Assessment	Call to discuss the project details	In Progress	3-Medium	
	09/19/2001 4:10 PM	Appointment	Meeting for Siebel 7 Upgrade	Unscheduled	2-High	
	09/14/2001 4:59 PM	Email - Outbound	Send the revised proposal	In Progress	2-High	
*	08/29/2001 2:30 PM	Appointment	Follow up with Anne to get her superior's reaction to the price list			
*	08/27/2001 4:40 PM	Personal	Vacation until September 3			
*	08/21/2001 3:00 PM	Appointment	Weekly status meeting with manager		3-Medium	
*	08/21/2001 11:00 AM	Call - Outbound	Call prospect Anne Stone		3-Medium	



Reassigning an Appointment

In looking over your activities, you notice that your vacation is scheduled at the same time as your follow-up appointment with Anne Stone. Rather than rescheduling your meeting with Anne, you reassign it to your colleague, Casey Cheng. To reassign your appointment, drill down on the activity.

Click the select button in the Employees field to launch the Employees dialog box.

The screenshot shows the 'Activity' form with various fields. The 'Employees' field is highlighted with a red arrow pointing to a small select button (a square with a downward arrow) next to the name 'SMURPHY'.

In the Employees dialog box, click New to assign the appointment to Casey Cheng.

The screenshot shows the 'Employees - Microsoft Internet Explorer' dialog box. It contains a table with columns for Primary, Last Name, First Name, and Job Title. The 'New' button is highlighted with a red arrow.

Primary	Last Name	First Name	Job Title
	Administrator	Siebel	Sys Admin
✓	Murphy	Seth	VP, Field Service



The Employees dialog box appears. Locate Casey Cheng's record, select it, and click OK.

Last Name	First Name	Position
Caine	Serina	Consultant 1
Candle	Jotta	Internet Service Specialist 2
Carey	Philip	Enterprise Associates Partner Relationship Manager
Carry	Paul	Service Representative, Kingston Systems
Carter	Susan	Consultant 2
Cervenka	David	Siebel Administrator
Cheng	Casey	Call Center Agent (ESN)

Casey Cheng now appears in the Employees dialog box, but you must make sure she is the primary employee or the appointment will not be assigned to her. Click the Primary field next to her name to assign the appointment to her.



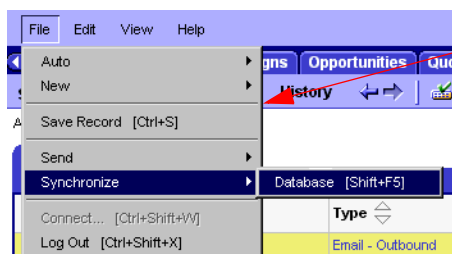
Synchronizing Your Data

The last thing you will want to do before you leave for the day is synchronize your data to the server on the network. The work you did today was done locally on your laptop. If you do not synchronize these changes, they could be lost.

You did quite a bit today:

- Added Anne Stone's contact record
- Attached the price list to Anne's record
- Created, executed, and saved a query
- Ran a report for your manager
- Made changes to your home page
- Made changes to your calendar
- Reassigned an appointment to your colleague
- Updated the status on a number of your activities

To prevent your hard work from being lost, synchronize your local database to the server database.



You can synchronize your local database from the application-level menu.

For more information about synchronization, see *Online Help*.



Your Work Day Is Over

Once you have finished synchronizing to the server, your work day is complete.

Congratulations! You have learned how to get started using your Siebel application.

To learn more about any topic mentioned in this guide, see *Fundamentals, MidMarket Edition*.