Siebel Communications Guide

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1 **What's New in This Release**

What's New in Siebel Communications Guide, Version 7.7

Minor editorial changes.

2 Overview of Siebel Communications

Siebel Communications allows media and communications service providers to manage, synchronize, and coordinate their customers' Internet, call center, field organization, and distribution channel requirements. It is designed to meet the needs of media service and content providers, and wireline, wireless, and Internet service providers. It serves a wide range of customers, from residential consumers to global corporations.

Siebel Communications allows user access to customer data residing in other systems. Using the Siebel eBusiness Application Integration (eAI) functionality, it integrates with billing, operations support systems (OSSs), and enterprise resource planning (ERP) systems.

Siebel eBusiness Applications are designed to work together to provide an integrated Customer Relationship Management (CRM) solution. Siebel Communications allows media and communications companies to implement Siebel modules that include sales, service, and marketing functionality. These modules include Siebel Sales, Siebel Service, Siebel Call Center, Siebel Field Service, and Siebel Configurator.

Siebel Anywhere allows the Siebel system administrator to apply upgrades to Dedicated Web Clients, Mobile Web Clients, and Siebel servers.

Key Features of Siebel Communications

Table 1 describes how Siebel Communications and Siebel Media provide solutions for key business issues.

Table 1. Siebel Communications and Siebel Media Solutions for Key Business Issues

Business Issue	Siebel Communications and Siebel Media Solutions
Account and Premises management	■ Management of accounts through multilevel account hierarchies based on complex account relationships ■ Independent management of service accounts and billing accounts ■ Tracking of physical facilities and network delivery points through premise records ■ Tracking of meters at service points ■ Management of account and customer information through profiles
Agreement management	■ Automated production of agreements from accepted quotes ■ Coordination of pricing information ■ Assigning of standard terms, conditions, and features ■ Tracking to make sure that agreements and service entitlements are fulfilled
Audit trail	■ Creation of a history of all the changes that have been made to various kinds of information ■ Records show who has accessed an item, what operation has been performed, when it was performed, and how the value was changed ■ Useful for maintaining security, examining the history of a particular record, and documenting modifications for future analysis and record-keeping
Billing management	■ Integration with back-office billing systems ■ Query and display of billing information ■ Management of payment information, payment plans, bill adjustments, and bill profiles
Call center optimization	■ Single desktop to manage multiple types of customer interactions ■ Computer telephony integration (CTI) to connect callers with the most qualified agent ■ Integrated Web and Interactive Voice Response (IVR) self-service functionality

Table 1. Siebel Communications and Siebel Media Solutions for Key Business Issues

Business Issue	Siebel Communications and Siebel Media Solutions
Credit management	■ Integration with a back-office credit system ■ Management of credit alerts ■ Notification of customers who are delinquent in payments
Customer acquisition	■ Analytical tools for segmenting prospects and developing targeted campaigns ■ Campaign management tools for developing and executing multichannel campaigns ■ Prebuilt performance analysis tools ■ Call scripting (providing text that uses proactive selling and retention techniques for employees to use when speaking with customers) ■ Territory assignment, lead scoring, and routing
Customer and partner applications	■ Siebel Partner Relationship Management, which allows your company to turn channel partners into an extended, virtual sales and service organization through the Internet ■ Siebel eService, which allows your customers to create and track their own trouble tickets and service requests, and to search for answers to frequently asked questions (FAQs), through the Internet ■ Siebel eSales, which allows your customers to use the Internet to browse though your company's products and services, and to configure and purchase them
Customer retention	■ Customer profile that is shared throughout the enterprise ■ Profile analysis to predict customer churn ■ Generation of win-back actions ■ Sales tools that increase sales effectiveness and maximize time spent building relationships ■ Tools for marketing analysis, campaign development, and execution
Equipment and infrastructure	■ Management of physical assets available at a customer site ■ Tracking of equipment sales to accounts ■ Management of meters and assets

Table 1. Siebel Communications and Siebel Media Solutions for Key Business Issues

Business Issue	Siebel Communications and Siebel Media Solutions
Fraud management	■ Integration with a back-office fraud management system ■ Management of fraud alerts ■ Definition of relevant thresholds for customer fraud profiles ■ Classification of customer accounts to indicate the likelihood of fraud ■ Management of customer accounts that are either late in settlement or delinquent
Order configuration and management	■ Siebel Configurator automates the generation of quotes and sales orders ■ Tracking of relationships between sales, sales orders, and work orders ■ Definition of process rules and automatic escalation of open sales orders ■ Use of product classes and attributes, and product bundles in generating sales orders ■ Provisioning of sales orders through work orders
Pricing management	■ A set of tools for defining pricing adjustments and the conditions under which they should be applied ■ An engine that evaluates condition statements and determines which pricing adjustments to apply ■ A testing area that allows assessment of the pricing adjustments ■ Integration with end-user interfaces such as Quotes, Orders, Siebel eSales, Siebel Partner Relationship Management, and Siebel eConfigurator
Siebel Marketing	■ Analysis of customer information and measurement of campaign results with eIntelligence ■ Creation and execution of targeted marketing campaigns ■ Internet marketing with eMarketing: Integrated email campaigns, customized Web offers, personalized Web pages, Internet newsletters, and Internet surveys
Third-party and legacy integration	■ Prebuilt COM and CORBA interfaces to leading Operating System Software (OSS) and Enterprise Resource Planning (ERP) applications ■ Integration mapping tools for cross-application process integration ■ Siebel Enterprise Integration Manager (EIM), which allows bidirectional data exchange and synchronization ■ Performing credit verification and address validation ■ Maintenance of billing accounts through an external billing system

Table 1. Siebel Communications and Siebel Media Solutions for Key Business Issues

Business Issue	Siebel Communications and Siebel Media Solutions
Trouble ticket and service request management	■ Single platform for logging, assigning, managing, and resolving customers' problems, including network problems or outages affecting customers ■ Online solutions search capability ■ Proactive customer notifications through email, pager, fax, and Internet ■ Automatic escalation of overdue trouble tickets and service requests ■ Integration with external outage management systems
Upselling and cross-selling	■ Scripting engine that identifies upsell and cross-sell opportunities with every customer contact ■ Product configuration system that prompts the salesperson to propose high-margin services ■ Integrated asset management system that provides information about configuration at each service location
Usage, billing, and service detail	■ Access to customer usage and service information ■ Summary customer data for account analysis

Product Modules and Options for Siebel Communications

Many Siebel eBusiness Applications modules can be purchased and used with Siebel Communications and Siebel Media. In addition, optional modules specific to Siebel Communications and Siebel Media can be purchased to provide enhanced functionality for various business processes.

For information about the optional modules that can be used with Siebel Communications and Siebel Media, contact your Siebel sales representative.

NOTE: This guide documents Siebel Communications with the optional modules installed. In addition, the Sample database includes data for optional modules. If your installation does not include some of these modules, your software interface will differ from that described in some sections of this guide.

The exact configuration of Siebel Communications and Siebel Media screens and views depends on your company's configuration of the application. For introductory information about using the Siebel Communications and Siebel Media interfaces, see *Fundamentals*.

Business Functions of Screens in Siebel Communications

The Siebel Communications and Siebel Media interfaces include procedure-specific screens. Some
screens are used exclusively by administrators. Table 2 lists the most frequently used Siebel
Communications and Siebel Media screen and views and the functions of the views in those screens.

Table 2. Siebel Communications and Siebel Media Screens and Views

Screen	Functions	For More Information
Accounts	Create, view, and update accounts. Set up and maintain account hierarchies. Define and maintain account profile information. Query customer bills. Record bill payments, repayment plans, and adjustments.	See Chapter 3, "Accounts in Siebel Communications", Chapter 4, "Profiles in Siebel Communications", and Chapter 10, "Billing in Siebel Communications" in this guide
Activities	Track personal activities and view activities for other team members. Track the progress of accounts, trouble tickets, service requests, interactions with contacts, and opportunities.	See *Applications Administration Guide*
Agreements	Create, generate, modify, approve, and track agreements.	See Chapter 6, "Agreements and Entitlements in Siebel Communications," in this guide
Assets	Manage information about products sold to accounts.	See *Siebel Field Service Guide*
Audit Trail	Creates a history of the changes that have been made in Siebel Communications and Siebel Media.	See *Applications Administration Guide*
Briefings	Gather and format information from a number of different sources, both inside and outside your company, including the World Wide Web.	See *Siebel eBriefings Administration Guide*
Calendar	Create and display activities (including to-do activities) and share calendar information with co-workers.	See *Fundamentals*
Campaigns	Manage outbound communications with prospects targeted for a particular marketing effort.	See *Applications Administration Guide*
Contacts	Record and track business and personal contact information associated with an account, an opportunity, a trouble ticket, or service request.	See Chapter 5, "Contacts in Siebel Communications," in this guide

Table 2. Siebel Communications and Siebel Media Screens and Views

Screen	Functions	For More Information
Credit Management	Manage and monitor customer credit issues. Share data with third-party credit management applications.	See Chapter 13, "Credit Management in Siebel Communications," in this guide
Entitlements	Associate entitlements with accounts, contacts, and products. Determine a customer's eligibility for service under its entitlements.	See Chapter 6, "Agreements and Entitlements in Siebel Communications," in this guide
Expense Reports	Manage expense-report information for your own expenses, or your team's expenses.	See *Applications Administration Guide*
Forecasts	Create business forecasts based on opportunities or products.	See *Applications Administration Guide*
Fraud Management	Manage and monitor customer fraud issues. Share data with third-party fraud management applications.	See Chapter 14, "Fraud Management in Siebel Communications," in this guide
Literature	Display company- and industry-related literature cataloged by the Siebel administrator.	See *Applications Administration Guide*
Opportunities	Manage sales opportunities for business and residential customers.	See Chapter 9, "Opportunities in Siebel Communications," in this guide
Orders	Create sales orders and track their status. Generate order summaries.	See *Siebel Order Management Guide* and *Siebel Order Management Guide Addendum for Industry Applications*
Premises	Create and maintain premises. Track service points, customer premise equipment, and meters associated with a premise.	See Chapter 7, "Premises in Siebel Communications," in this guide
Products	Display products, product lines, product features, and price lists.	See *Siebel Order Management Guide* and *Siebel Order Management Guide Addendum for Industry Applications*
Quality	Manage information about adverse events or reactions related to products.	See *Applications Administration Guide*
Quotes	Create, view, and update quotes. Update opportunities and configure solutions for quotes.	See *Siebel Order Management Guide* and *Siebel Order Management Guide Addendum for Industry Applications*

Table 2. Siebel Communications and Siebel Media Screens and Views

Screen	Functions	For More Information
Service Requests	Create, display, and update customer requests for information about or assistance with products or services.	See Chapter 12, "Service Requests and Trouble Tickets in Siebel Communications," in this guide
SmartScripts	Define the application workflow for an interactive situation in a script. These interactive situations could include inbound communications (such as customer service) and outbound contacts (such as telemarketing).	See *Siebel SmartScript Administration Guide*
Solutions	Search, organize, and add to a knowledge base of answers to service requests and trouble tickets.	See *Siebel Field Service Guide*
Trouble Tickets	Create, display, and update customer requests for information about or assistance with products or services.	See Chapter 12, "Service Requests and Trouble Tickets in Siebel Communications," in this guide
Work Orders	Manage the work components associated with activating or turning off service for a customer.	See Chapter 11, "Work Orders in Siebel Communications," in this guide

3 Accounts in Siebel Communications

This chapter defines some basic concepts about accounts. It also provides the procedures for setting up account hierarchies and updating account information.

Administrators, such as call center administrators, sales administrators, and sales managers, will benefit from reading this chapter. It describes how your customer service representatives (end users) will enter information into the accounts screens, which form the hub of customer information. After becoming familiar with the end-user procedures, you can customize the software to fit your company's needs.

About Accounts in Siebel Communications

An *account* is any external organization with which your company does business. It negotiates agreements, receives service and bills, and raises trouble tickets. An account is usually the central entity of a Siebel CRM implementation.

After adding accounts in Siebel Communications, end users at your company contribute information for tracking customer service, processing requests, viewing agreements, and so on.

Account Hierarchy

A single account per customer will probably meet your company's needs to track the accounts of residential customers. However, for large commercial clients, end users might need to build an account hierarchy. An *account hierarchy* is a multilevel structure reflecting parent-child relationships within the organization.

Within a complex account hierarchy, an account usually represents one of these:

- A customer, prospective customer, or household
- An individual service or billing account
- An aggregate account for billing or service accounts
- A division in an organization
- An entire organization

Hierarchies can accommodate subsidiaries and complex organizations that have, for example, a world headquarters, multiple regional headquarters, and many branch locations, each with its own service and billing requirements.

This multiple-level structure supports a top-down view of the customer. Separate child accounts can be used to designate which information pertains to one subsidiary or another within the organization.

A hierarchy has these further advantages:

■ It allows you to maintain customer information, such as address and contact name at each point in the hierarchy.

■ It aids in specifying usage and billing roll-up relationships.

■ It allows you to create and maintain aggregation points and to support complex discounting methods.

To fully support mergers, demergers and corporate restructuring, Siebel Communications automatically updates the master account or parent account of an account record and its children when the changes are made to the account hierarchy. In particular, it is possible to reparent a child account if that subsidiary is sold to another holding company, or to reparent a whole organization if it is purchased by another entity. These changes take effect by changing the parent account of the account record.

Account Classes

An *account class* is a method for classifying an account according to its position and role in an account hierarchy. When setting up the hierarchy, end users define parent-child relationships among the accounts. Then they designate which account class applies to each new account, according to your customer's requirements and organizational structure.

For example, with communications companies, it is common for the service to be delivered to one subsidiary while bills get sent to another subsidiary. Separate accounts would be created for each subsidiary, one with the account class *service* and the other with the account class *billing* to reflect their different functions. An account given the account class *service* generally stores service item information and allows end users to analyze the customer's usage or orders. An account given the account class *billing* generally stores information for the financial transaction or invoice.

Siebel Communications does not restrict parent-child associations based on account class. Any class can be a child of any other class. For example, a customer account can be placed anywhere in the hierarchy, and a billing account can be the parent or the child of a service account. To enforce hierarchy rules based on account class, you need to set them up through state models. For more information about state models, see *Siebel Business Process Designer Administration Guide.*

Out of the box, Siebel Communications provides these five classes for accounts:

■ **Customer Class.** An account with this class represents the actual customer, person, or organization that is receiving service. A *customer account* includes basic customer information, such as the company name and headquarters address. It can receive both service and bills.

■ **Service Aggregator Class.** An account with this class receives aggregate usage details for all of its subsidiary accounts. It can be anywhere in the account hierarchy. It allows you to generate and view multiple service accounts that share some specifications.

   Implementation example: A company has three offices in different states, and each office receives a wired phone service and a wireless phone service. Each office can have both services set up as separate service accounts, with each office set up as a service aggregate account for the services.

■ **Service Class.** An account with this class receives service, but not bills. In the account hierarchy, it is the account level at which the physical delivery of the service or product occurs. It can represent a person or organization with multiple service addresses.

■ **Billing Aggregator Class.** An account with this class receives aggregate billing details for all of its subsidiary accounts. It can be anywhere in the account hierarchy. It allows you to generate and view multiple billing accounts that have some of the same specifications. It can be set up to bill the customer based on certain requests, such as creating bills for the different services and rolling those separate billing statements into a billing aggregate account. It also allows you to create and maintain billing aggregation points and to support complex discounting methods. It receives and aggregates bills.

   Implementation example: A company has offices in different states, and each office receives services two different services: broadband TV and broadband Internet. Each office can have both services set up as separate billing accounts, and each office can be set up as a billing aggregate account for the services. Then the corporate headquarters can be set up as a billing aggregate for the three offices and a single payment can be made for the services.

■ **Billing Class.** An account with this class is used to invoice the customer for products and services. In the account hierarchy, it is the account level at which the financial transactions for the service or product occur. It shows the collection of all charges applied to a customer in a given time frame for which the customer must submit payment.

Siebel Communications displays certain information based on the account class:

■ The Service Account and Billing Account Explorers filter on account class.

■ In the Quotes and Order Entry views, only those accounts with the appropriate account class appear in the dialog box for association.

NOTE: You can set up additional account classes or rename the default classes. However, when renaming, be careful to rename the explorers as well, because they filter accounts on class names. For instructions on modifying account classes, see *Applications Administration Guide*.

Figure 1 shows an example of an account hierarchy where parent-child relationships are established along service and billing account classes.
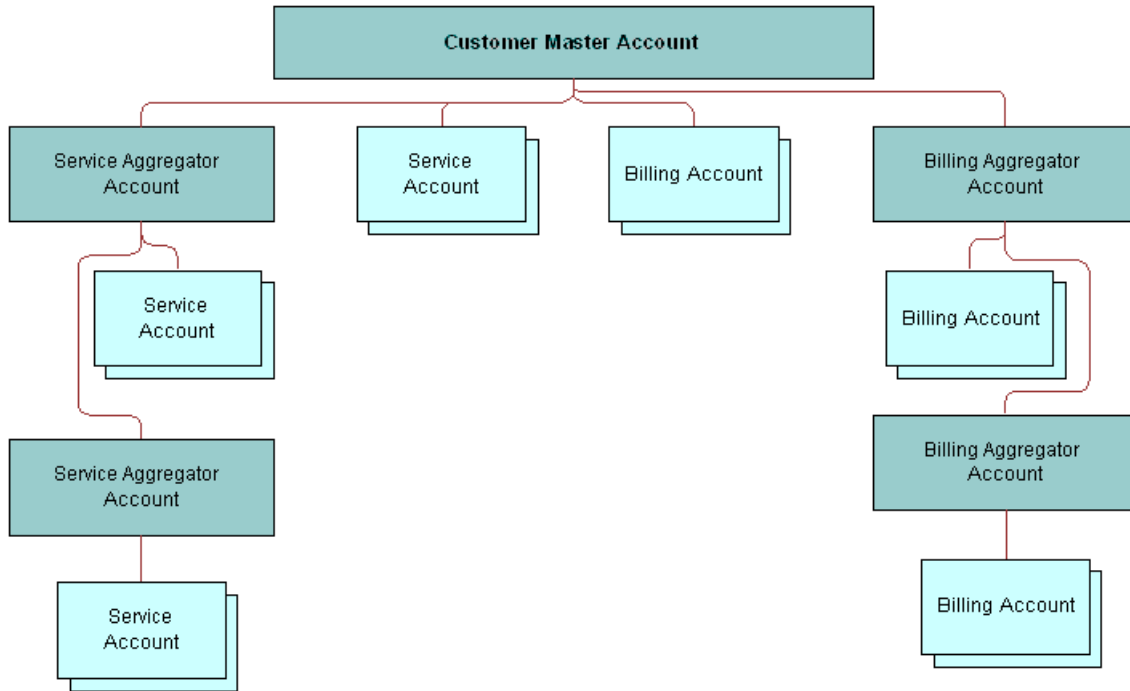
Figure 1. Example of Account Hierarchy

Account Roles and Responsibilities

Sales administrators and sales managers usually oversee the creation and maintenance of accounts by their teams. All team members (end users) can create an account and update account information.

Table 3 lists the roles and responsibilities related to account procedures.

Table 3. Account Roles and Responsibilities

Role	Description
Administrator	Sales Administrator or Sales Manager ■ Determines what information is required for an account ■ Determines what account information is visible to each member of the sales force ■ Reviews and analyzes account activity to measure performance and improve sales effectiveness ■ Reviews account hierarchies developed by the sales staff
End User	Customer Service Representative ■ Performs call center activities, primarily responding to customer inquiries and sales order requests ■ Creates accounts for new customers, including the required key information for an account ■ Updates accounts for existing customers ■ Understands relationship between accounts and associated contacts ■ Creates account hierarchies ■ Understands account hierarchies and relationship of accounts within hierarchy Sales Representative ■ Focuses on outside sales and customer relationship management ■ Creates accounts for new customers, including the required key information for an account ■ Updates accounts (such as creating a sales opportunity), creates sales orders, and tracks service requests or trouble tickets ■ Creates account hierarchies, designating parent-child relationships among an organization's accounts

Scenario for Accounts in Siebel Communications

This scenario shows a sequence of procedures performed by an end user. Your company may follow a different sequence according to its business requirements.

A customer service representative (CSR) receives a call from a prospective customer. The inbound call is arbitrarily routed to the CSR, since IVR (Interactive Voice Response) and CTI (Computer Telephony Integration) are unable to locate the account.

The caller explains that he is the owner and CEO of a small company that develops specialized software for the high-tech industry. He wants to use the CSR's company as its sole provider.

The CSR first verifies that no account currently exists for the caller and then gathers the following information about the caller's company:

■ It has these three service locations:

■ The headquarters or administrative office is located in Newcastle, England.

■ A development office is based in York.

■ A sales office is located in Birmingham.

■ All services for the Northern England offices (Newcastle and York) will be billed on a single invoice; however, each location will receive a statement.

■ The Birmingham site will receive its own invoice.

■ The caller wants a discount based on all the services he has at all three locations, and he wants to receive a statement for all services.

Based on this conversation, the CSR creates the account hierarchy shown in Figure 2.
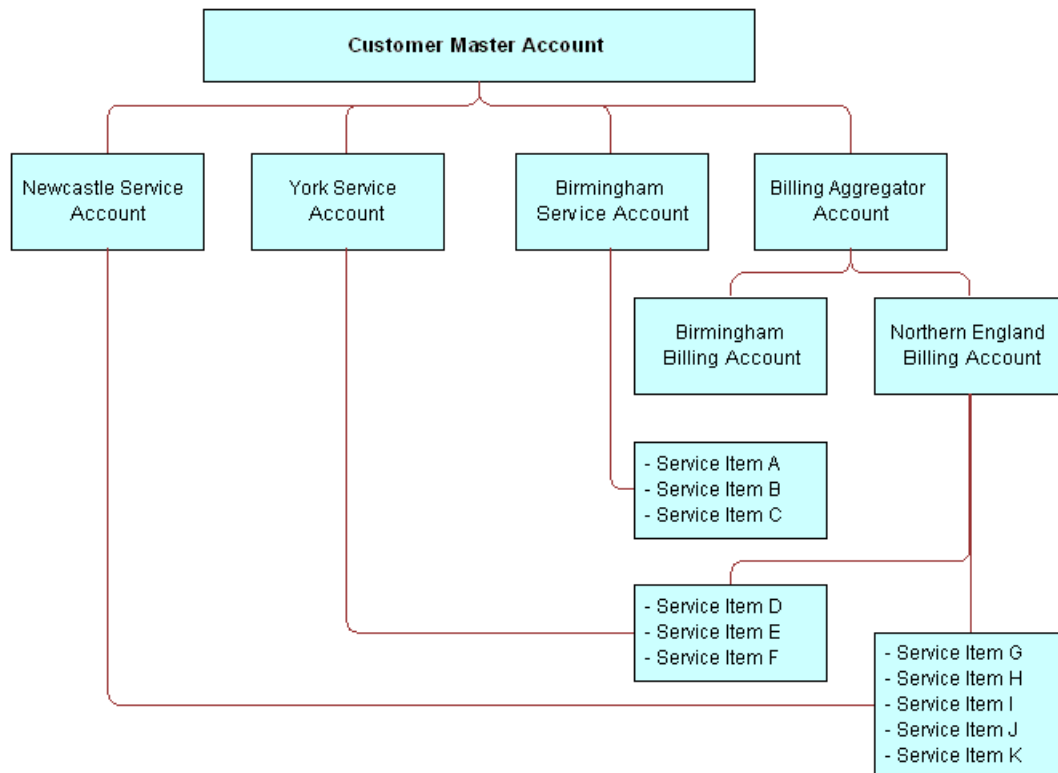
Figure 2. Account Hierarchy for Business Scenario

Based on this hierarchy, the CSR must set up the following to establish service for the caller:

■ One customer account for the entire company

■ Two billing accounts (one for Northern England and one for Birmingham)

■ Three service accounts (one for Newcastle, one for York, and one for Birmingham)

■ One billing aggregator account for both billing accounts so that a complete statement can be invoiced

Next, the CSR receives a call from a customer who wants to add broadband Internet service to his account. The CSR accesses the customer's account and updates the information. While on the phone with the customer, the CSR checks the existing infrastructure to verify that the service is available in the customer's neighborhood.

Figure 3 shows the sequence of procedures an end user might perform to manage accounts:
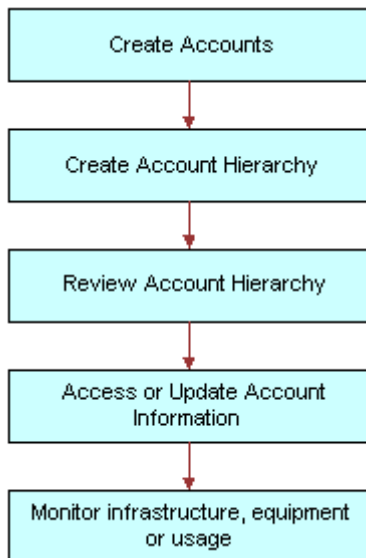
Figure 3. Example of Sequence for Accounts

Setting Up External Organizations for Siebel Communications

Administrators must set up external organizations to populate the selection boxes that appear in external organization fields throughout your Siebel application.

For more information about external organizations, see *Security Guide for Siebel eBusiness Applications*.

The external organization appears in the selection box that is displayed when an end user enters an external organization field. External organization fields include, but are not limited to, those listed in Table 4.

Table 4. Examples of External Organization Fields

Screen	View	Field
Accounts	Equipment > Other Equipment	Supplier
Accounts	Infrastructure	Owner
Premises	Infrastructure > Account Detail	Owner
Work Orders	More Info	Provider

Creating an Account in Siebel Communications (End User)

An account forms the major link for entering detailed information about customers. After adding accounts in Siebel Communications, end users can contribute information for tracking customer service, processing requests, viewing agreements, and so on.

To create an account

1   Navigate to the Accounts screen.

2   In the link bar, click Accounts list.

3   Add a new record to the Accounts list, and complete the necessary fields in the Account record and the More Info form. To access more fields, click the show more button in the form. Some fields are described in the following table.

Field	Comments
Account Class	Distinguishes an account within an account hierarchy when dividing accounts into billing or service accounts. The Billing Account and Service Account Explorers filter on this field. Also, the accounts available for association in the Quotes and Entry views are determined by account classes.
	For Account Class, select Customer if you are creating a residential customer account.
	For more information on account classes, see "About Accounts in Siebel Communications" on page 19.
Account Team	Determines who can access information about the account.

Field	Comments
Address	Address for the account. Enter a new address or associate an existing one. In the dialog box for associating addresses, the Premise check box indicates if the address is a premise.
Good Standing	Determines if the account is blocked centrally, which excludes certain activities from being performed. Note that this field is different from account status.
Lock Assignment	If you do not want Assignment Manager to run, check this field. If you do *not* select Lock Assignment, Assignment Manager can reassign this account to another team according to its territory. For example, if you want to allow a commercial account with three different locations to be handled by the same account manager, even though one or two locations fall in another account manager's territory, do *not* select Lock Assignment.
Site	Description of the location or function of the account, such as *headquarters* or *corporate* or *San Francisco*.
Synonyms	Allows you to refer to accounts (and their sites) in the way that you prefer. For example, an account named A/B Products, Inc., might have the following synonyms: AB, A/B, and AB Products.
	When you search for an account or enter an account in another part of Siebel Communications, you can use a synonym instead of the actual name.

Creating an Account Hierarchy in Siebel Communications (End User)

Creating an account hierarchy consists of creating child accounts and associating them with a parent account. You must create the parent account before adding child accounts. For instructions about creating an account, see "To create an account" on page 26.

NOTE: For mergers or acquisitions, end users might need to move the entire hierarchy under a new account. To do so, follow the procedure described in "To change a parent-child relationship" on page 28. Be sure to associate the new parent account at the top level. The new parent ID automatically cascades to its child accounts, reflecting the change.

To create an account hierarchy

1 Navigate to the Accounts screen.

2 In the link bar, click Accounts list.

3 In the Accounts list, add a record for each child account and complete the necessary fields.

4 In the Parent field, select the parent account from the dialog box.

To change a parent-child relationship

1 Navigate to the Accounts screen.

2 In the Accounts list, select the child account.

3 In the Parent field, select a different parent account in the dialog box.

Reviewing an Account Hierarchy in Siebel Communications (End User)

End users can review the entire account hierarchy to check its structure.

To review the hierarchy for an account

1 Navigate to the Accounts screen.

2 In the link bar, click one of these options:

■ To review the hierarchy for billing or service accounts, click Billing Account Explorer or Service Account Explorer, and then expand the subfolders in the explorer tree.

The explorer view contains only those accounts for the designated account class, including corresponding aggregator accounts.

■ To review all account hierarchies, click Account Management, and then expand the subfolders in the explorer tree.

The explorer view displays accounts under the subfolders Accounts (shows all child accounts, regardless of class), Billing Accounts, and Service Accounts.

To view the account hierarchy as an organization chart

1 Navigate to the Accounts screen.

2 In the Accounts list, click the name of the account.

3 Click the Account Hierarchy view tab.

4 Scroll down to view the organization chart showing the account hierarchy.

To view a list of child accounts

1 Navigate to the Accounts screen.

2 In the Accounts list, click the name of the account.

3 Click the Account Hierarchy view tab.

4 Scroll down and select Account Org Hierarchy from the lower Show drop-down list.

A list of child accounts appears.

Accessing or Updating Account Information in Siebel Communications (End User)

Siebel Communications allows end users to access the same account information through different views. Specific views allow end users to find the information most relevant to them, according to the procedure they need to perform at that moment.

Most views allow end users to record interactions with a customer and to update the customer's information, depending on the system setup and the end user's access rights.

From all views, end users can access information on billing, service, quotes, agreements, contacts, and so on.

The end-user views are:

■ **Customer portal view (call center agent).** While talking to the customer, call center agents generally need an overview of a customer's account. The customer portal view allows them to access the most commonly needed information in a compact presentation.

■ **Account views (sales representative).** Sales representatives access the same account information as call center agents, but they might do it through the Account views. Each view displays a specific piece of account information. For example, while preparing a report, a sales representative might want to review the usage details or order history for an account. The sales representative does not need the account overview information available in the customer portal because she is normally not talking to the customer on the telephone while reviewing information for her report.

To access the customer portal view

1 Navigate to the Accounts screen.

2 In the Accounts list, click the Name field.

The Customer Portal view appears with several lists and forms summarizing the account information.

To access the account views

1 Navigate to the Accounts screen.

2 In the Accounts list, click the name of the account.

3 Click a view tab to access specific information for that account.

To view an agreement for an account

1 Navigate to the Accounts screen.

2 Select the account.

3 In the link bar, click select Agreement Accounts Explorer.

4 In the explorer tree, expand the folder for the account.

Subfolders appear for the selected account's agreements.

5 Expand the folders and select the specific agreement or subagreement to view.

Monitoring Infrastructure, Equipment, and Usage in Siebel Communications (End User)

End users can record and monitor the infrastructure, equipment, and usage information for service customers.

NOTE: End users can either view the usage detail information or add telecommunications-related infrastructure information through the Premises screen as well.

To view usage detail information

1 Navigate to the Accounts screen.

2 In the Accounts list, click the name of the account.

3 Click the Usage Detail view tab.

A list of services appears with usage history beneath it. The history displays period-by-period or monthly usage information about the account and service you selected.

4 In the Usage Detail list, select the service.

5 In the Usage History list, from the drop-down list, select the type of usage information you want to view.

All options except Usage History and Usage Information display the information in charts.

To add installed or planned equipment

1 Navigate to the Accounts screen.

2 In the Accounts list, click the name of the account.

3 Click the Equipment view tab.

4 In the Equipment or Other Equipment list, add a record and complete the necessary fields.

Use the Equipment list to record and view items supplied by your company and the Other Equipment list to record and view items supplied by other companies, including competitors and alliance partners.

You can also use these lists to record information about the equipment your customers own or plan to acquire For instance, if your company offers digital service to high-end digital set-top boxes, you might record information about the premise equipment currently installed at a large apartment building or the future wiring needs of a developer.

If you create separate service accounts for customers with multiple locations, you can associate installed and planned equipment for a location with its corresponding service account. If you use a single account to represent a customer with multiple locations, you should associate the installed and planned equipment for each of the customers' various locations with the one account for that customer.

Some fields in the lists are described in the following table.

Field	Comments
Install Date	Date on which the equipment was installed, or the date on which the customer plans to purchase the equipment.
Product	Choices change dynamically depending on the type of equipment you select. Most of the other fields are populated automatically with data about the product you select.
Type	Links equipment to type of service available for that equipment.

To add telecommunications-related infrastructure

1 Navigate to the Accounts screen.

2 In the Accounts list, click the name of the account.

3 Click the Infrastructure view tab.

4 In the list, add a record and complete the necessary fields.

Use this list to record information or attributes for the telecommunications-related infrastructure at the sites to which you provide services. This may be especially important at large industrial or commercial sites such as factories, warehouses, and office buildings.

If you use multiple service accounts to represent a customer with multiple locations, you can associate infrastructure items at each location with its corresponding service account. If you use a single account to represent a customer with multiple locations, you should associate the infrastructure items at all the customer's locations with the one account for that customer.

Some fields in the list are described in the following table.

Field	Comments
Attribute	Values change dynamically with your selection in the Service Type field.
Owner	Owner of the infrastructure item.
Value	Specific information about the data in the Attribute field.

4 Profiles in Siebel Communications

This chapter explains some basic concepts regarding profiles and provides step-by-step instructions for creating them. It also describes the interrelationship among profiles, business functions, and back-office systems.

Administrators, such as call center administrators, sales administrators, and sales managers, will benefit from reading this chapter. It shows where customer service representatives (end users) enter information for these profiles and which information might be critical for smooth integration with back-office systems.

After becoming familiar with the end-user procedures, you can customize the software to fit your company's needs.

About Profiles in Siebel Communications

A *profile* stores information required to perform a business function. For example, a billing profile contains the information needed to invoice the customer for products and services.

Profile Types

Table 5 describes the account profiles available within Siebel Communications.

Table 5. Account Profiles

Profile	Comments
Address Profile and MSAG Profile	Allows for validation of an address against a master street address guide (MSAG) data source or other external database.This helps provide an accurate address in the format needed for external applications, such as an Emergency 911 database. You can also use the MSAG Profile as an example for creating other profiles relevant to your company.
Billing Profile	Captures the bill run characteristics needed to invoice the customer for products and services. It is generally associated with a billing account. An account has one billing profile that can be used in multiple billing systems to produce a bill for the account.
Customer Profile	Contains information about an account when the customer is an organization rather than a residential account. Much of the profile information can be added automatically if your company imports this data into Siebel Communications from its billing software or customer information system.
Exemption Profile	Contains the specific information related to any subsidies and exemptions for which the customer may be eligible, tracks when a subsidy or exemption takes place, and records the receipt of supporting information.
Financial Profile	Contains information used to perform a credit check on the customer.
Fraud Profile	Contains information about the fraud status of an account. It allows end users to set fraud thresholds that, when exceeded, trigger a fraud alert.
Loyalty Profile	Contains information needed to predict customer churn, estimate debt risk, and identify upsell and cross-sell opportunities. When integrated with a third-party predictive modeling package, it displays scores generated by that software.
Site Profile	Contains detailed information about an account's location.
Statement Profile	Records billing statement preferences, including number of copies, media, and contact requesting the statement.

NOTE: The order management module no longer uses the Service Profile view. If you used the Service Profile view in the 6.x or earlier versions of Siebel Communications, you want to use the new MSAG Profile view instead.

Profile Roles and Responsibilities

Table 6 lists the employees who generally perform the procedures related to profiles.

Table 6. End-User Roles and Responsibilities

Position	Description
Customer Service Representative	■ Focuses on call center activities, primarily responding to customer inquiries and sales order requests ■ Understands account hierarchies, including the required key information for a profile ■ Creates profiles for new customers, modifies and adds profiles for existing customers
Sales Representative	■ Focuses on outside sales and customer relationship management ■ Understands account hierarchies, including the required information for profiles ■ Creates profiles for new customers, modifies and adds profiles for existing customers

Scenario for Profiles in Siebel Communications

This scenario shows a sequence of procedures performed by a customer service representative (end user). Your company may follow a different sequence according to its business requirements.

This scenario continues the . For a new customer, the customer service representative (CSR) has already created an account hierarchy, added a contact for the account, and entered an address for the account.

Now, for each service account in the hierarchy, the CSR wants to validate its address against the MSAG (master street address guide) database or a similar external database. This guarantees that the proper address format is sent to the Emergency 911 database when the service is provisioned.

After submitting each new address for validation, the CSR chooses the correct match from the list the database sends back. She checks to see that the validated field has been automatically updated to indicate the procedure was completed.

Next the CSR creates unique profiles associated with individual accounts. Each profile stores information necessary to perform a business function.

Starting with the top-level parent account, the CSR creates a financial profile and a statement profile:

■ The CSR creates a financial profile for the top-level parent account because the customer's company will have financial responsibility for all its accounts. The financial profile includes all necessary information to perform a credit check on the company.

■ The CSR also creates a statement profile for the top-level account because the customer wants to receive a statement at the corporate level that summarizes all charges for products and services.

The statement profile contains information, such as the address, number of copies of the statement required, statement media type, frequency of statement, contact person, and so on. Each statement profile is given a unique identifier within the CSR's company's billing system. All the profile information is required by the billing system so that the statement can be processed.

The CSR then moves on to the billing subaccounts in the hierarchy and creates separate billing profiles for those subaccounts. Each billing profile stores information, such as the mailing address, contact, billing frequency, and debit or credit card data for that account.

She then creates statement profiles for several subaccounts so that those offices can receive informational statements for the amount of service used.

Next she creates an exemptions profile wherever subsidy and tax exemption information applies. For example, a charitable organization will have a tax exemption status. Exemption profiles can be created for any level of the account hierarchy and are usually part of the initial account setup. They contain information that can also be passed to the billing system.

Then she creates a site profile for each service account, which specifies how many floors the site has, where equipment is located within the site, and so on.

Figure 4 shows the accounts and profiles needed for the customer's account hierarchy discussed in the business scenario.

NOTE: Siebel Communications does not restrict how end users build hierarchies. If you want to enforce certain rules, you must set the rules up within Siebel eBusiness Applications. This diagram shows one recommended use of profiles for specific account classes.
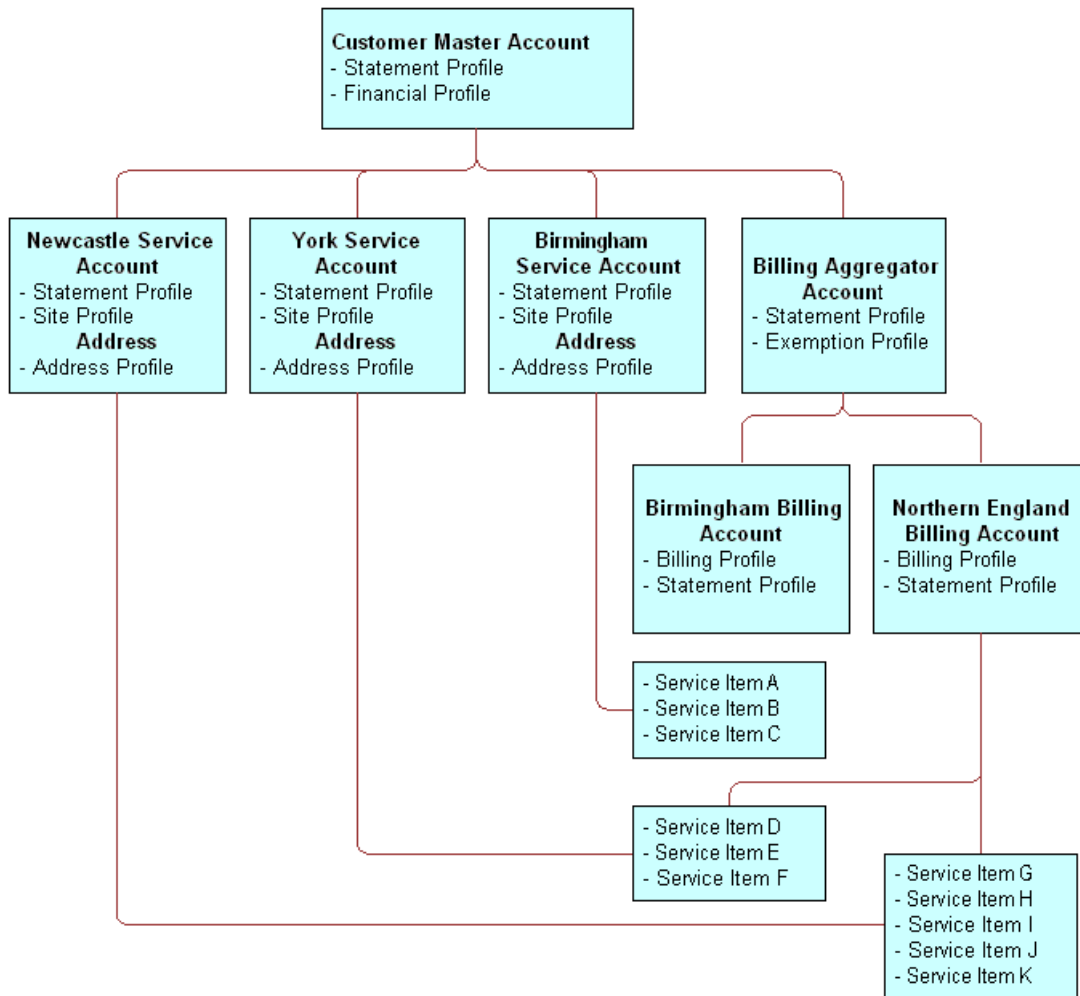
Figure 4. Business Scenario for Account Hierarchy and Profiles

Figure 5 on page 38 summarizes the interrelationship among accounts, profiles, and back-office systems.

NOTE: For simple residential customer accounts (those not separated into billing and service accounts), all profiles are directly associated with the customer account and not with subaccounts as shown in Figure 5 on page 38.
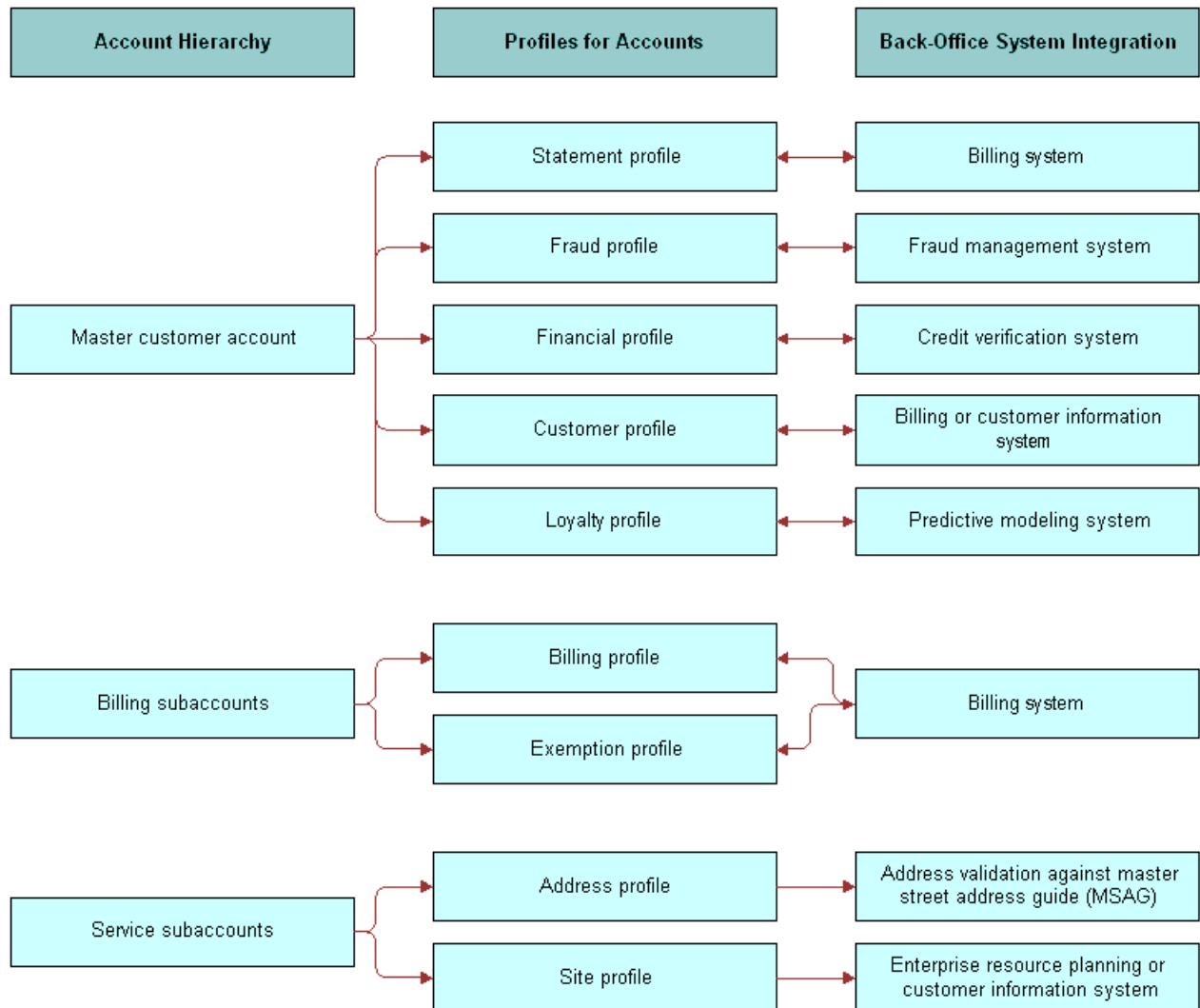
Figure 5. Interrelationships Among Accounts, Profiles, and Back-Office Systems

Creating and Updating a Profile in Siebel Communications (End User)

At each level in the account hierarchy, end users can create one or more account profiles. However, administrators need to make sure the application supports the specific type of profiles they want end users to maintain. For example, if the billing application does not support exemption plans, there is no need to have an exemption profile.

NOTE: This section pertains to all profiles *except* Address (MSAG) Profiles. For instructions on working with MSAG profiles, see "Creating and Updating an Address Profile in Siebel Communications (End User)" on page 44.

To create or update a profile

1 Navigate to the Accounts screen.

2 In the Accounts list, click the name of the Account.

3 Click the Profiles view tab.

4 In the link bar of the Profiles view, click a profile type.

5 In the forms or lists that appear for that specific profile, update the information according to the step-by-step instructions found in the next sections.

The following sections describe the various profiles you can create using this procedure and the unique fields required for each.

About Billing Profiles in Siebel Communications

End users create a *billing profile* to invoice the customer for products and services. A billing profile contains such information as billing frequency, payment type, bill media, bill type, and the customer's email address for sending a bill electronically. This information can be submitted to a back-office system, which may be the master repository for this information.

A billing profile is generally associated with a billing account and may represent the legally binding agreement between the customer and the service provider. It reflects information from an external billing system.

Some fields in the Billing Profile form are described in Table 7.

Table 7. Billing Profile Fields

Field	Comments
Budget Billing	Indicates if you require budget billing collection.
Email Bill To	Email address to which the customer bill can be sent electronically.

Table 7. Billing Profile Fields

Field	Comments
External Billing Account #	Populated when Siebel Communications executes a preconfigured call to the back-office system, requesting an account number. The account number generated by the billing system serves as the billing system's primary reference for the life of the account.
Payment Method	Payment method selection determines additional fields to update.

To add payment method information to a billing profile

■ Depending on the payment method, add further information or update existing information:

■ For Automatic Debit, Check, or Monthly Statement, enter information in the Automatic Debit form.

■ For Credit, enter information in the Credit Card Payment form.

Some fields are described in the following table.

Field	Comments
Category	Card category of the payment card, such as Debit, Procurement, or Credit card.
Block	Indicates if a card is blocked. This is determined when you run the credit card through a check using an external system.
Block Reason	Reason that a payment card is blocked. This block only applies to one particular payment card. If the client has several payment cards, another card can still be used.

About Customer Profiles in Siebel Communications

End users create a *customer profile* for accounts when the customer is an organization rather than a residential account. Much of the profile information can be added automatically if your company imports this data into Siebel Communications from its billing software or customer information system.

The customer profile allows end users to capture relevant customer information, such as financial and sales information about the customer, and to record information about the customer's partners and competitors.

About Exemption Profiles in Siebel Communications

End users create an exemption profile to list subsidy and exemption information for which the customer may be eligible. An exemption profile includes fields to track when a subsidy or exemption takes place, and it records the receipt of supporting information.

Some fields in the Exemption Profiles form are described in Table 8.

Table 8.   Exemption Profile Fields

Section	Field	Comments
LIFELINE	Effective Date	Date when Lifeline assistance becomes effective.
	Eligible	Customer's eligibility for Lifeline assistance.
	Received Date	Date when Lifeline documentation was received.
	Renewal Date	Date when Lifeline renewal is required.
DIRECTORY ASSISTANCE		Select from the Status drop-down list and the Effective Date calendar.
TAX EXEMPTION		Identification numbers to show eligibility for a Federal, State, County, or City exemption. Tax Exemption number stores the number of the certificate that is issued for temporary exemption from tax.
TEL-ASSISTANCE		Select from the Status drop-down list and the Effective Date calendar.

About Financial Profiles in Siebel Communications

End users create a financial profile to perform a credit check on the customer. To verify a customer's credit, Siebel Communications submits a request to a back-office system or credit bureau. The back-office system or credit bureau sends back a response that includes a credit score that determines if the customer is authorized by internal credit policy to subscribe to services. These back-office systems perform credit checks for incorporated businesses or individuals.

Some fields in the Financial Profiles form are described in Table 9. However, different fields may appear according to the Account Type you selected (for example, Residential as the Account Type).

Table 9. Financial Profile Fields

Section	Field	Comments
PROFILE	Contact Last Name and First Name	Contact for the account. This field is automatically populated with the name of the contact specified in the Primary Contact field.
	Corporate Number	This may be a business number as provided by a state, county, or city government.
	Legal Entity	Legal name of the company or corporation.
	Tax Profile Code	Displays the code from standard tax categories that classify companies according to their tax aspects. This information is stored in an external billing or credit/tax system.
BANK		Customer's bank information for the credit check.
CREDIT RATING	Last Update	Date the last credit check was performed.
	Rating	Credit rating of the customer.
	Source	Group that did the most recent credit rating.
	Update By	The user ID of the person who last requested a credit check.

To run a credit check

1 Set up the financial profile (see "To create or update a profile" on page 39 and "About Financial Profiles in Siebel Communications" on page 41 for instructions).

2 In the Financial Profile form, click Credit Check.

This sends the financial profile information to an external system, which reports a credit rating. The credit rating typically is produced by a credit bureau and indicates the customer's ability to pay. It helps companies to assess their risk before agreeing to credit terms with a potential customer.

NOTE: Credit check data for an incorporated business or an individual consists of business name, billing address, corporate ID, and tax ID. For an unincorporated business, credit check data includes name, social security number, and driver's license.

About Fraud Profiles in Siebel Communications

A fraud profile contains information about the fraud status of a customer account. End users can set up thresholds that, when exceeded, trigger the creation of a fraud alert.

Some fields in the Fraud Profiles form are described in Table 10.

Table 10. Fraud Profile Fields

Field	Comments
Credit Threshold	Amount of credit the account is allowed.
Daily Threshold	Threshold limit of the calls the customer can make.
Domestic Threshold	Threshold limit for domestic calls the customer can make.
International Threshold	Threshold limit for international calls the customer can make.
Max Duration of Calls	Maximum time that is allowed for a call.
Max Number of Calls	Maximum number of calls that can be made in a given period.
Max Value of Calls	Cost of the calls, in the appropriate currency.
Overflow Value	Select the overflow allowed for the threshold limits in the Calculator. Expressed as a percentage.
Sensitive Number Threshold	Threshold limit for calls to sensitive numbers that the customer can make. Sensitive numbers may include high-priced calls such as those to 900 numbers.

About Loyalty Profiles in Siebel Communications

The Siebel industry solution for communications and media contains a Loyalty Profile.

The Loyalty Profile view contains scores generated by a third-party predictive modeling application pertaining to customer accounts. These scores help predict customer churn, project customer lifetime value, estimate financial risk, and identify upsell and cross-sell opportunities.

The Loyalty Profile view also contains key data used as input to a predictive modeling application. Some data, while residing in the Loyalty Profile view, is not generated from within the Siebel applications.

A marketing administrator can develop loyalty and retention campaigns based on these predictive scores.

About Site Profiles in Siebel Communications

A site profile contains detailed information about an account's location. This information can provide employees and partners with special delivery instructions or with useful site information to help determine the type of service available.

Some fields in the Site Profiles form are described in Table 11. To access all fields, click the show more button in the form.

Table 11. Site Profile Fields

Field	Comments
Open Market	Indicates if the site is either in an unregulated market or in a regulated one.
Servicing Company	Service company or local distribution company that provides the service.
Supply Characteristics	Specifies if the site is inside or outside your company's standard service territory.

About Statement Profiles in Siebel Communications

End users can create multiple statement profiles for an account if the billing system supports this. Statement profiles contain billing statement preferences, including number of copies, media, and contact requesting the statement.

Some fields in the Statement Profile form are described in Table 12.

Table 12. Statement Profile Fields

Field	Comments
Media	Media on which the statement is to be transmitted.
Vendor	Organization that prints or distributes bills.

Creating and Updating an Address Profile in Siebel Communications (End User)

End users can enter addresses without tight restrictions on formatting. However, when provisioning services, tighter formatting restrictions may be required by a back-office system.

To guarantee proper formatting, the address needs to be validated against a back-office data source. In Siebel eBusiness Applications, Address Profiles allow multiple formats of one address to be stored. The MSAG (master street address guide) format is available with the shipped product, but other formats can be added using Siebel Tools. When setting up additional formats, use the MSAG Profile as an example.

Obtaining the proper address format is important in performing several key business processes:

■ Validating service addresses or mailing addresses against an external standard to guarantee a unique location for finding facilities, activating services, or mailing materials through the Postal Service.

■ Determining the existing services and service provider at the address. This could be a simple confirmation, although in the case of wireline service moves, a variety of service information can be returned or exchanged between systems.

■ Forwarding updated information to an external database in the format necessary to guarantee consistency within that database after a service is activated.

Each address profile format requires an external data source for validation. Your company can either own the data outright or subscribe to a service that provides the data.

NOTE: The MSAG format adheres to the Local Service Order Guidelines (LSOG) v5 specification.

After validating an address, end users might need to change some address fields. To edit those fields, end users must revalidate the address, as described in this section.

To validate an address

1 Navigate to the Accounts screen.

2 In the Accounts list, click the name of the account.

3 Click the Address Profile view tab.

The Address list appears with the MSAG Profile form beneath it. The Address list shows all the addresses associated with the account.

4 In the Address list, select the address you want to validate.

5 Scroll down to the MSAG Profile form, add a record, and complete the necessary information.

6 In the Validated field select *Y*.

If the address validation is integrated with an external data source, selecting Y begins a search for possible addresses.

NOTE: This behavior differs from the default behavior of the shipped product, which supports manual address validation. In the manual state, selecting *Y* marks the MSAG Profile as validated.

7 In the dialog box containing addresses, select the address that matches the customer's address.

After the address has been validated, the MSAG profile becomes read-only with the exception of the Access Instruction and Descriptive Location fields. To update the profile, the user must revalidate the address.

To revalidate an address

■ Follow the procedure for validating an address ("To validate an address" on page 45), but click the
   ReValidate button after Step 4 on page 45 before continuing with the procedure.

5 Contacts in Siebel Communications

A *contact* is someone about whom you or your company needs to keep business or personal information. Siebel Communications helps you manage contacts and associate contact data with accounts, opportunities, trouble tickets, or service requests.

Customer service representatives and field service representatives are examples of end users who might use contact management functions.

End users can use Siebel Communications to:

■ Record and track business and personal contact information

■ Create and track a list of activities for a contact

■ View a contact profile

■ View information about trouble tickets and service requests that are associated with a contact

This chapter discusses these procedures and provides instructions for performing them.

Scenario for Contacts in Siebel Communications

This scenario shows a sequence of procedures performed by a call center manager (administrator) and call center agent (end user). Your company may follow a different sequence according to its business requirements.

A call center agent receives a call from a customer with a service problem. The agent verifies that the caller is already registered as a contact by using a query on the contact's name. The agent adds information to the customer's contact profile and provides the needed service by creating a trouble ticket without leaving the Contacts screen. The agent then logs the activity. During the call, the customer states an interest in purchasing a particular product, so the agent associates an opportunity with the contact. After the call, the agent sends a follow-up email to the customer to verify that the action was taken.

Figure 6 shows the sequence of procedures that an end user might follow to manage contacts.
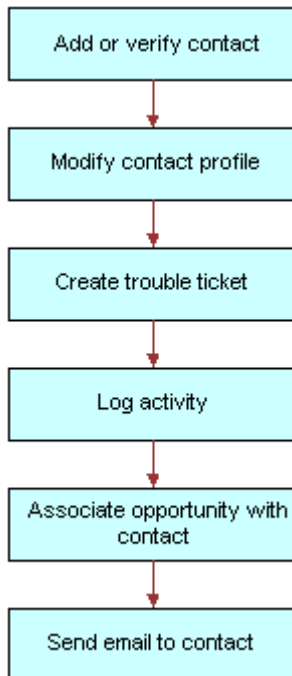
Figure 6. Example of Sequence for Contact Management

Adding a Contact in Siebel Communications (End User)

End users need to add contacts and verify that particular contacts are established customers. Their company may choose to use passwords for an additional level of verification.

End users can view all contact records that they create. If an end user adds a contact to an account or opportunity and that account or opportunity has an associated sales team, members of the sales team can also view the contact. In a contact record, a sales team is also known as a contact access list.

To add a contact

1 Navigate to the Contacts screen.

2 In the link bar, click Contacts List.

3 Add a new record to the Contacts list, and complete the necessary fields in the record and the More Info form.

4 In the Account field, select one or more accounts in the dialog box.

If there is more than one account associated with this contact, designate one as the primary account by selecting the Primary field for that account.

For more information about adding contacts, see *Applications Administration Guide*.

Modifying a Contact Profile in Siebel Communications (End User)

End users can modify a contact profile. Contact profiles are distinct from account profiles.

To add information to a contact profile

1   Navigate to the Contacts screen.

2   In the Contacts list, click the name of the contact.

3   Click the Profile view tab.

4   In the Profile form, complete the necessary fields.

Creating a Contact-Related Activity in Siebel Communications (End User)

End users can add, modify, or delete activities for a contact.

To add an activity to a contact

1   Navigate to the Contacts screen.

2   In the Contacts list, click the name of the contact.

3   Click the Activities view tab.

4   In the Activities list, add a record and complete the necessary fields.

Associating a Contact with a Trouble Ticket in Siebel Communications (End User)

End users can associate a contact with a trouble ticket. A similar method can be used to associate a contact with a service request.

For more information about Trouble Tickets, see Chapter 12, "Service Requests and Trouble Tickets in Siebel Communications."

To associate a contact with a trouble ticket

1   Navigate to the Contacts screen.

2 In the Contacts list, click the name of the contact.

3 Click the Trouble Tickets view tab.

4 In the Trouble Tickets list, add a record and complete the necessary fields.

> **NOTE:** If the trouble ticket status is set to Closed, some fields cannot be modified. To modify these fields, drill down on the Ticket Id hyperlink, and in the Trouble Ticket Detail form, change the status to Open or Pending.

Additional End-User Tasks for Contact Management in Siebel Communications

For descriptions of other tasks related to contact management, see *Applications Administration Guide*.

Contacts and Opportunities

End users can use Siebel Communications to associate an opportunity with a contact. For more information, see *Applications Administration Guide*.

Contact Correspondence

End users can use Siebel Communications to send email to a contact. If an email application and Siebel Office are installed, the message content can be automatically generated. For more information, see *Applications Administration Guide*.

6 Agreements and Entitlements in Siebel Communications

Agreements and entitlements may be used by customer service representatives, field service representatives, service managers, account managers, support renewal agents, and contract administrators. Agreement and entitlement data is stored in agreement and entitlement records that must be created, associated with other records, revised, examined, and printed.

For further procedures and information related to agreements and entitlements, see *Applications Administration Guide* and *Siebel Field Service Guide*.

About Agreements and Entitlements in Siebel Communications

This section defines agreements and entitlements and discusses the relationship between them.

Agreements Defined

An *agreement* is a legally binding document that defines the obligations to offer, provide, or produce specific products or services over a set period of time for a specific amount of money. A sale may require an agreement to detail and document the sale transaction.

An agreement typically includes detailed descriptions of pricing, terms, limitations, coverage, conditions, legal rights, processes, and guidelines. Agreements are often revised to reflect changes in the company, a company's product lines, or in the market.

Siebel Communications can manage complex commercial agreements as well as simple residential agreements. Complex agreement can have multiple levels, each with different terms, conditions, and discounts.

An agreement must be associated with one contact or at least one account. However, agreements may be associated with multiple accounts.

Entitlements Defined

An *entitlement* defines the level of support to which a customer is entitled. Examples of entitlements include response time metrics and service level metrics. A *metric* is a type of provision (for example, response time) combined with a value for that provision (for example, 2 hours).

Entitlements are associated with customers through their service-level agreements (see).

Agreement and Entitlement Relationships

The relationship between agreements and entitlements is as follows:

■ An agreement can have one or more entitlements.

■ An entitlement can have one or more metrics, accounts, contacts, or products.

■ The accounts and contacts associated with agreements may be different from the accounts and contacts associated with an entitlement.

An agreement that is associated with an entitlement can specify that all contacts or products should receive support under the entitlement. This provides blanket contact service agreements and blanket product service agreements.

Types of Agreements

Many different types of agreements can be created in Siebel Communications, including contracts, sales agreements, service agreements, service level agreements, master service agreements, work orders, profiles, letters of understanding, letters of intent, nondisclosure agreements, subcontractor work orders, price protections, and support renewals. Some types of agreements are defined below:

■ A *contract* is an agreement that typically covers an ongoing relationship between a vendor and a customer. A contract states what a vendor is contractually bound to provide to a customer and what a customer is contractually bound to purchase from a vendor. This type of agreement is legally binding and may specify such things as products, services, discounts, terms, and entitlements.

■ A *sales agreement* is an agreement that is typically related to a specific sale. This type of agreement specifies such things as base price, discounts, special rates, rentals or leasing, and financing.

■ A *service agreement* is a type of agreement that defines a service relationship. It spells out a customer's rights to receive service, including the price, service level, support requirements, maintenance, and warranty. Service agreements have specific components that include:

  ■ **Service Calendars.** Specify the days and hours during which service will be provided (for example, Monday to Friday and 9 to 5).

  ■ **Quotas.** Specify the amounts of service the customer can receive (for example, number of phone calls allowed, number of on-site visits allowed, and so forth).

  ■ **Entitlements.** Specify the accounts, contacts, and products that are covered, as well as the metrics being used.

■ A *service level agreement* (also referred to as an SLA or a *service support level*) is a type of service agreement that defines a customer's entitlements and assets. A *service level* is a quantitative measurement that is usually expressed as a percentage. As examples, a service level may be the percentage of parts received on time out of those requested, the percentage of asset uptime, or the percentage of problems fixed within a required time frame. A service level agreement can also be part of a larger service agreement.

Master Agreements and Subagreements

Small and uncomplicated transactions may only need a standard boilerplate agreement. Larger transactions may need a customized collection of boilerplate agreement sections. Sales involving multiple products and staggered delivery schedules may need agreements with customized content within the customized collection of agreement sections.

End users can create parent-child relationships among agreements. If, for example, a large commercial account requires a master agreement and one or more subagreements, end users can designate the main agreement as a master agreement and then generate its associated subagreements. These agreements are linked to one another as parent and child agreements.

Data from which to build agreements comes from the agreement library in Siebel Communications. An *agreement library* is a data repository developed by your company's sales and legal organizations. It includes information such as recommended and required text for agreement sections, answers to agreement questions, sample cover letters, and sample executive summaries.

Scenarios for Agreements and Entitlements in Siebel Communications

Agreements for commercial customers and residential customers may be managed differently. To reflect this, this section presents two different business scenarios.

Scenario for a Commercial Customer

This scenario shows a sequence of procedures performed by an account manager (end user). Your company may follow a different sequence according to its business needs.

An account manager has been working with a commercial customer for the past two months on an opportunity to supply 100 new subscriptions and rented handsets to the customer's office. Account information for the customer is already present in Siebel Communications. Over the past two months, the account manager has created and maintained the opportunity, quotes, and proposals in Siebel Communications.

After reviewing several proposals and discussing different offerings and services, the company's owner has accepted the account manager's most recent proposal and has requested a service agreement for the current quote.

First, the account manager creates an agreement record with basic information such as account name, effective date, and a general description of products and services to be covered. He next selects the appropriate terms to add to the agreement and specifies contacts for this agreement. Next, he creates an order. When the order is created, Siebel Communications associates the new service with the agreement.

The account manager then uses Siebel Communications to generate a physical service agreement. Using a predefined agreement template that the account manager selects, Siebel Communications automatically assembles sections from the agreement library and adds the information the account manager entered for the agreement record and its associated terms and contacts. Siebel Communications then places the text in a Microsoft Word document. If necessary, the account manager can manually edit the Word document to personalize it for the customer.

Finally, the account manager prints the finished service agreement for the owner's approval and signature.

Figure 7 shows the sequence of procedures that might be used to manage commercial agreements.
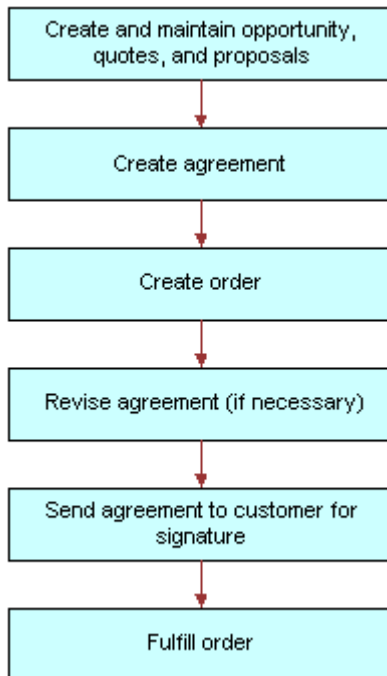
Figure 7. Example of Sequence for Agreements (Commercial)

Scenario for a Residential Customer

This scenario shows a sequence of procedures performed by a customer service representative (end user) at a local office. Your company may follow a different sequence according to its business needs.

A residential customer with an existing service agreement decides to purchase a wireless handset for her daughter. She visits an authorized dealer to complete this transaction. The dealer looks up her agreement in the dealer's back-office system, which is connected to Siebel Communications at Greenwich mean time (GMT).

The dealer then creates the order in Siebel Communications. When the order is created, Siebel Communications associates the new service for the daughter with the mother's agreement. When the order is complete, Siebel Communications automatically updates the agreement with the new service. Finally, Siebel Communications issues requests to the appropriate back-office applications to provision the daughter's new wireless service.

Figure 8 shows the sequence of procedures that might be used to manage residential agreements.
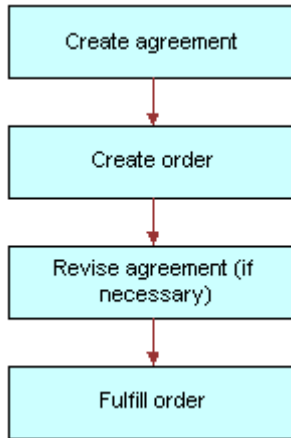
Figure 8. Example of Sequence for Agreements (Residential)

Setting Up Templates for the Auto Document Feature of Siebel Communications

Administrators must set up agreement templates for the Auto Document feature to work properly.

To set up a template for the Auto Document feature

1   Navigate to Administration - Document > Proposal Field Mapping.

2   In the Business Objects list, add a record for the mapping information.

3   In the Business Object field, select Service Agreement.

4   Complete the necessary fields, and click Save.

5   In the link bar, click Proposal Templates.

6   In the Templates list, add a record and complete the necessary fields:

    a   In the Mapping Name field, select the name you just created.

    b   In the Default field, select the check box if you want to make this template the default one.

        NOTE: You must designate one agreement template as the default for the Auto Document
        feature to work.

    c   In the Category field, select Agreement.

    d   In the Template File Name, select the template file to use.

To verify the template appears as an agreement template

1 Navigate to Agreements > Documents.

2 In the Documents list, add a record.

3 In the Template drop-down list, verify that the template appears as an option.

Adding an Agreement in Siebel Communications (End User)

End users can add an agreement record to the Siebel Communications database.

To add an agreement

1 Navigate to the Agreements screen.

2 In the Agreements list, add a new record and the necessary fields in the record and the More Info form. To access more fields, click the show more button in the form.

Some fields are described in the following table.

Field	Comments
Account	Name of the account that the agreement covers.
	If multiple accounts are associated with this agreement, the primary account is visible in the form.
Agreement #	Agreement number. Automatically generated, unique ID, which cannot be changed or updated.
Approver	A member of the agreement team who is authorized to approve the agreement.
Effective	The date on which the agreement becomes effective. This field is for information only.
End	The date the agreement expires.
Name	User-assigned name for the agreement.
Parent Agreement	If the current agreement is a subagreement or child agreement, this field identifies the master or parent agreement.
PO#	Purchase order number.
Revision	Revision number of the agreement.
	The value is set to 1 when the agreement is created and is incremented whenever the agreement is revised.
Service	Indicates that this is a service agreement.
Start	The date on which agreement functionality begins.

Field	Comments
Team	People working on the agreement.
Valid	Indicates that the agreement is valid.
	This field is checked when entitlements are considered and when preventive maintenance actions are initiated.
Vendor	Name of vendor who originally sold the agreement.

Adding Agreement Terms and Generating Totals in Siebel Communications (End User)

Agreement terms include information such as payment method, shipping charges, and credit card number. Agreement totals summarize the charges relating to the service for which the agreement is created.

To add terms to an agreement and generate a total

1   Navigate to the Agreements screen.

2   From the Show drop-down list, select All Agreements.

3   In the Agreements list, select an agreement.

4   Click the Terms & Totals view tab.

5   In the Terms & Totals form, complete the necessary fields.

   The agreement totals are calculated automatically and displayed in the Totals form. The Products field and Services field amounts equal the Total Extended Price for Products and the Total Extended Price for Services, respectively. The Total field displays the total price for the shipment.

Creating and Printing an Agreement Document in Siebel Communications (End User)

End users can prepare and print an agreement for use as a contract document.

To create and print an agreement document

1   Navigate to the Agreements screen.

2   From the Show drop-down list, select All Agreements.

3   In the Agreements list, select an agreement.

4 Click the Documents view tab.

5 In the Documents list, click Auto Document.

Some fields are automatically populated.

NOTE: If you receive an error message about a template, check the template setup. For instructions, see "Setting Up Templates for the Auto Document Feature of Siebel Communications" on page 55.

6 If necessary, complete or modify the fields.

Some fields are described in the following table.

Field	Comments
Draft Name	Filename for the generated agreement.
Name	Name of the agreement document record.
Template	Template on which to base the agreement.

7 In the Documents list, click Generate Draft.

Siebel Communications assembles the standard agreement sections into a Microsoft Word file according to the template you selected, and inserts specific information from the current agreement record. A Microsoft Word application window appears with the draft agreement displayed.

8 Edit and print the Word document, as necessary.

9 Save the Word document.

The document is automatically associated with the agreement record.

Associating an Agreement with an Order in Siebel Communications (End User)

End users can associate agreements with orders.

To associate an agreement with an order

1 Navigate to the Orders screen.

2 In the link bar, click Sales Orders list or Service Orders list.

3 Add a new record to the Sales Orders or Service Orders list and complete the necessary fields. To access more fields, click the show more button in the form.

4 In the Agreement Name field, select an agreement in the dialog box, and click Submit.

Associating an Agreement with a Service Item in Siebel Communications (End User)

End users can associate agreements with service items. This allows companies to track detailed agreements at the item level of a product bundle.

To associate an agreement with a service item

1   Navigate to the Quotes screen.

2   In the Quotes list, select an existing quote or add a record.

3   Drill down on the Name hyperlink.

4   In the Quote form, complete the necessary fields.

5   In the Line Items list, add a record and complete the necessary fields for the service to be ordered.

6   In the Product field, select a product.

   NOTE: The dialog box contains only those products with the "Track as Asset" field selected in the Product Administration screen, More Info view.

7   Scroll down and click the Line Item Detail subview tab.

8   In the Line Item Detail form, select an agreement in the Agreement Name field.

9   In the Line Items list, click the Orders view tab.

10 Click the Sales Order or Service Order button.

11 Complete the necessary fields in the order.

12 Drill down on the Order # hyperlink.

13 Verify that the line items from the quote appear.

14 In the Price List field, select a price list.

15 Submit the order to change the status to Open.

Revising an Agreement in Siebel Communications (End User)

End users create a revision to an agreement to add a new clause or term, or to update information that already exists in the agreement. End users might do this, for example, when a customer orders a new service that is not covered by the existing agreement, or when their company modifies its discount rates.

When end users revise an agreement, Siebel Communications preserves a record of each earlier version of that agreement. Consequently, revision records allow you to track the history of any agreement. The original agreement is saved as revision 1. When an agreement is revised:

■   The respective revision number is increased by one.

■   The agreement name in the Name field is changed to *name* (.*x*) where *x* is the revision number.

To revise an agreement

1   Navigate to the Agreements screen.

2   In the Agreements list, click the name of an agreement.

3   In the More Info form, click Revise.

Viewing Agreement Details in the Explorer in Siebel Communications (End User)

End users can use the hierarchical format of the Agreement explorer to view agreements and examine associated information.

To examine agreement details in the Explorer

1   Navigate to the Agreements screen.

2   In the link bar, click Explorer.

A data document appears for each of the parent-level agreements your company has with its customers.

3   Expand the folder for the data document.

Subfolders appear for the selected agreement's associated agreements, entitlements, activities, notes, and products and services.

4   Expand the subfolder.

The individual records appear as a series of data documents below the subfolder and as rows in the list.

5   Select a record.

The details of the record appear highlighted in the list.

7 Premises in Siebel Communications

The premises functionality of Siebel Communications is used by administrators, such as distribution network planners, field service engineers, field service operations managers, and managers of customer service representatives. It is also used by end users, such as customer service representatives.

This chapter explains the concept of a premise and describes procedures you can use to manage the creation and maintenance of premise records. It also describes typical procedures that end users might use when working with premise records.

A *premise* is an address that identifies a physical location, such as a building, apartment, land parcel, and so on, to which communications services can be delivered. In Siebel Communications, a premise acts as a grouping of service points.

A premise record stores the address of a building, apartment, or land parcel to which your company offers communications services. Siebel Communications also stores nonservice addresses that are associated with particular customers, such as billing addresses outside the company's service territory. Nonservice account addresses have a variety of uses, but premise records are specifically used to track addresses at which a company might offer services. Premise records are never deleted from the system and can therefore be used to track asset and service usage even if the premise becomes unoccupied.

Premise records also track service points. A *service point* is an asset that is installed at a particular service location and represents a network delivery point, such as a phone jack.

For more information about setting up an asset, see *Siebel Field Service Guide*.

Premise information can be imported into Siebel Communications either periodically in batches, using Siebel Enterprise Integration Manager, or through real-time integration with a third-party application. Premise information can also be entered manually.

Every instance of a service delivered to a particular premise needs a unique identifier, called a service item identifier. Most services are provided through a physical network connection; for example, phone service is connected to a phone jack, and a data access line is connected to a port on a switch. With physical network connections, the Service Point is used as the service item identifier. Some services, such as cellular phone services, do not require a physical network connection. In these cases, a logical identifier, such as a telephone number or IP address, is used as the service item identifier. Typically this identifier is automatically assigned by an external system.

Scenario for Premises in Siebel Communications

This scenario shows a sequence of procedures performed by a customer service representative (end user), field service engineer, and field service operations manager. Your company may follow a different sequence according to its business requirements.

A customer calls your company to set up telephone service at a new house. The customer service representative (CSR) who accepts the call creates an account for the customer and orders the service and service point (phone jack). The ordering process initiates an activity that directs field service engineers to the site. The field service engineers then connect the house to the telephone network, creating a service point for the phone jack.

A field service operations manager changes the status of the account address record to a premise in Siebel Communications. She also associates the service point with the premise. In addition, she enters some information related to the premise as a note and then associates an electronic file, which contains a hookup wiring schematic, with the premise. Finally, the field service operations manager creates an activity to notify the network planning department that the local network needs maintenance.

Six months after the occupant moves in to the house, she calls to report static on the telephone line. The CSR who accepts the call first verifies the caller and the caller's location. Before creating a service request, he views general information about the premise and looks to see if there are any existing service requests associated with the premise. The CSR notes that static has been reported several times before and creates a service request documenting the repeated problem.

Figure 9 shows the sequence of procedures that might be used to set up a residential premise.
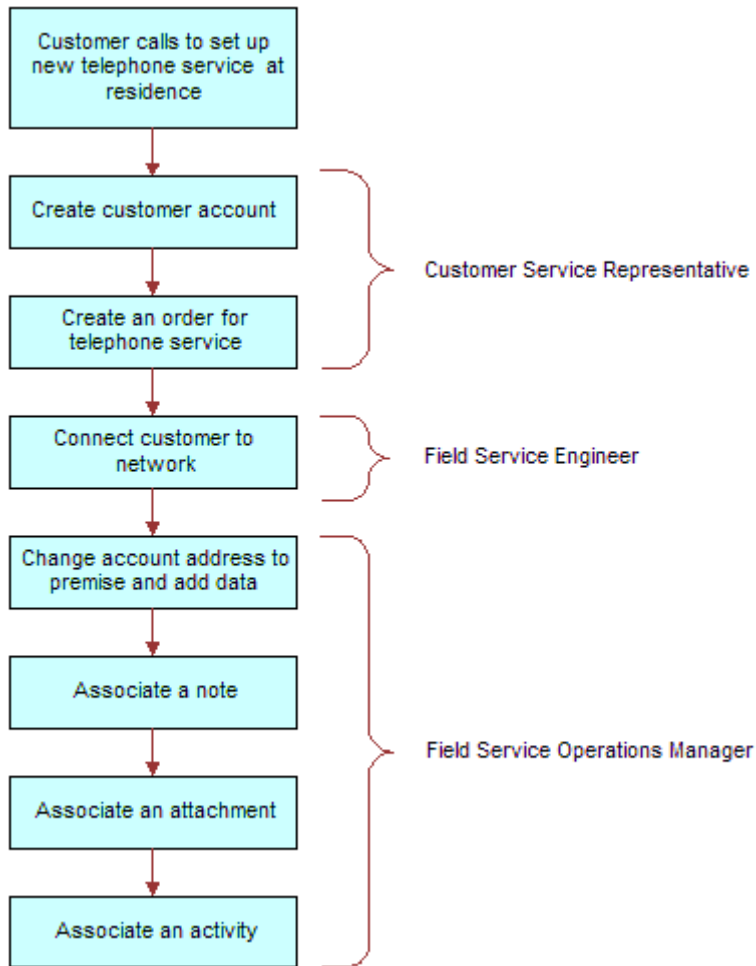
Figure 9. Example of Sequence for Initial Setup of a Residential Premise

Figure 10 shows the sequence of procedures that might be used to maintain a residential premise.
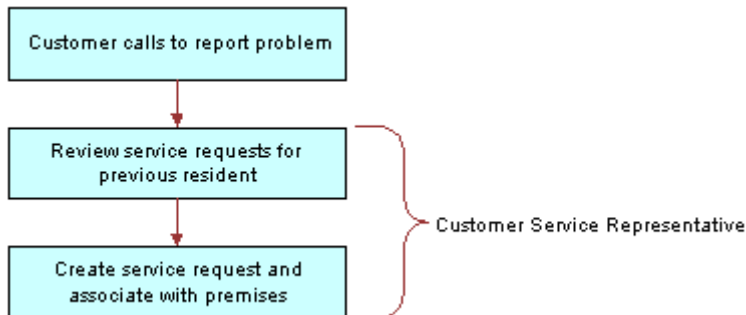
Figure 10. Example of Sequence for Maintenance of a Residential Premise

Setting Up Premises in Siebel Communications (End User)

Only administrators can set up premise records. End users can view premise information, view information associated with premises, and associate other records with premises.

About Adding a Premise Record

There are two ways to add a premise record. The method you use depends on if an account for the customer who will occupy the premise has already been established.

You can add a premise record before the customer who will occupy a premise is known. In this case, there is no existing customer account with which to associate the premise. When a customer moves into the premise and requests service, the association is made automatically when the premise is added to the account addresses.

If an account for the customer who will occupy a new premise has already been established, a new address will be added to the account addresses. Once the address is validated as a premise, the address is flagged as a premise by an administrator.

Creating a Premise

Use one of the following procedures to create a premise.

To add a premise before the customer account exists

1 Navigate to Administration - Data > Premises.

The All Premises list appears with the More Info form beneath it.

2 In the form, add a record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Bill Group	ID of the billing system batch or group to which the premise belongs.
Buildings	Total number of buildings at the premise.
Floors	Total number of floors at the premise.
Read Route	Name of the meter reading route to which the premise belongs.
Read Sequence	Number that identifies the sequence in which the meters at the premise are read.

To add a premise when the customer account already exists

1 Navigate to Administration - Data > Addresses.

The Addresses list appears with the Address form beneath it.

2 In the Addresses list, select an Address.

3 In the Address form, check the Premise field.

4 In the link bar, click Premises.

The All Premises list appears with the More Info form beneath it.

5 In the list, select the new premise and complete the necessary fields in the form.

For a description of some fields, see the table in .

Registering a Premise Hookup in Siebel Communications (End User)

Premises can be associated with one or more service points.

To add a service point and associate it with a premise

1 Navigate to Administration - Data > Premises.

2 In the All Premises list, select a premise.

3 Click the Service Points view tab.

4 In the Service Points list, add a record.

The Service Points dialog box appears with a list of service points that are not associated with any premises.

5 In the dialog box, select an existing service point or click New to create a new service point.

6   In the Service Points list, complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Location	Description of the location of the service point.
Product	Associate a product with this service point. Only products in which the value in the product's Type field is Service Point and Service Type is not null are available for selection.
Removal Date	Date on which the service point is removed from the premise.

Associating an Activity with a Premise in Siebel Communications (End User)

End users can create an activity and associate it with a premise to:

■ Remind themselves of procedures related to a premise that they must perform.

■ Communicate procedures related to a premise that other members of the organization must perform.

To associate an activity with a premise

1   Navigate to the Premises screen.

2   In the Premises list, click the address of a premise.

3   Click the Activities view tab.

4   In the Activities list, add a record and complete the necessary fields.

Verifying a Premise in Siebel Communications (End User)

End users can verify the premise that a caller is referring to by looking up the premise record.

To look up a premise

1   Navigate to the Premises screen.

2   In the Premises list, click the name of a premise.

For a description of some fields, see the table in "To add a premise before the customer account exists" on page 64.

Viewing Service Point Information in Siebel Communications (End User)

End users can view service point information for the premise.

To view service point information for a premise

1 Navigate to the Premises screen.

2 In the Premises list, click the name of a premise.

3 Click the Meter Points view tab.

The Meter Points list displays service point information for that premise. Some fields are described in the following table.

Field	Comments
Product	Name of the product that is the service point.
Service Type	Populated automatically based on selection of Product.

Viewing Usage History in Siebel Communications (End User)

End users can view usage history for a service point associated with a premise. This is useful for resolving billing inquiries from customers who have recently moved into the premise. Usage history is displayed as data in lists and charts. End users can view usage history through either the Premises screen or the Accounts screen. For instructions for viewing usage history through the Accounts screen, see Chapter 3, "Accounts in Siebel Communications."

NOTE: Usage data may reside in an external data repository and be viewed in Siebel Communications if that type of integration has been set up.

To view usage history for a service point

1 Navigate to the Premises screen.

2 In the Premises list, click the name of a premise.

3 Click the Meter Points view tab.

4 In the Meter Points list, drill down on the Service Point hyperlink.

5 In the Service Point Services list, select a record.

6 In the Usage History list, select the information you want to view from the drop-down list.

Viewing Service Requests for a Premise in Siebel Communications (End User)

End users can view service requests associated with a premise.

To view a service request associated with a premise

1 Navigate to the Premises screen.

2 In the Premises list, click the name of a premise.

3 Click the Service Requests view tab.

Two Service Requests lists appear. The upper list displays accounts and the lower list displays service requests.

4 In the upper list, select an account.

5 In the lower list, select a service request.

6 To view more detailed information about the service request, drill down on the SR Number field.

Adding a Service Request for a Premise in Siebel Communications (End User)

End users can add a service request by creating a new service request in the Service Request view of the Premises screen.

To add a service request for a premise

1 Navigate to the Premises screen.

2 In the Premises list, click the name of a premise.

3 Click the Service Requests view tab.

Two Service Requests lists appear. The upper list displays accounts and the lower list displays service requests.

4 In the upper list, select an account.

5 In the lower list, add a record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Owner	Person handling the service request.
Priority	Ranking to help you prioritize service requests internally. Describes the response your company gives to the service request. The Priority ranking does not have to be the same as the severity.

Field	Comments
Severity	Severity of the service request or impact on the customer. Describes the seriousness of the problem.
	The Severity ranking does not have to be the same as the priority.
SR Number	Unique, system-generated number that identifies the service request.

Adding Infrastructure Information in Siebel Communications (End User)

End users can create a record containing infrastructure information that is associated with a premise through an account.

To add infrastructure information to a premise

1 Navigate to the Premises screen.

2 In the Premises list, click the name of a premise.

3 Click the Infrastructure view tab.

Two Infrastructure lists appear. The upper list displays accounts and the lower list displays infrastructure.

4 In the upper list, select an account.

5 In the lower Infrastructure list, add a record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Attribute	Changes dynamically according to the value selected in Service Type.
Owner	Customer or account that owns the infrastructure item.
Value	Information about the data in the Attribute field.

Additional End-User Tasks for Premise Management in Siebel Communications

For descriptions of other procedures related to premises, see *Siebel Bookshelf*.

Caller Verification

When receiving an inbound call, end users first verify and locate the caller. For more information about verifying and locating a caller, see *Applications Administration Guide*.

Customer Accounts

When a new customer requests service from your company, end users need to create an account for the customer. For more information about creating a customer account, see Chapter 3, "Accounts in Siebel Communications."

Sales Orders

When a customer requests a new service, end users must create a sales order. For more information about creating a sales order, see *Siebel Order Management Guide Addendum for Industry Applications*.

Premises and Attachments

At any time, end users can store additional information relating to a premise in the database by associating an electronic file with the premise record. For directions for associating an attachment with a record, see *Fundamentals*.

Premises and Notes

At any time, end users can store additional information relating to a premise in the database by adding a note and associating it with the premise record. For directions for associating a note to a record, see *Fundamentals*.

8 Assets in Siebel Communications

Asset records are used by customer service representatives (CSRs), field service representatives, service managers, account managers, support renewal agents, and contract administrators. The procedures described in this chapter are primarily used by customer service representatives.

Asset data is stored in records that can be created, associated with other records, revised, examined, and printed. For more information about assets, see *Siebel Field Service Guide*.

About Assets in Siebel Communications

An *asset* is a product or product component that has been purchased by a customer and installed at, turned on at, or delivered to a customer site. An asset can be a physical product or a service product. Examples include phone pagers, phone handsets, telecommunications services, and Internet services that are active at specific customer sites. An asset is tracked at an asset number level. An asset has attributes, a configuration, and a location.

Siebel Communications uses both the asset number and product name to track the asset. It is the combination of these two fields that makes an asset unique within Siebel applications. Therefore, the same asset number can be shared by different products. For example, a phone jack and a DSL connection can have the same asset number for different products.

Asset management and tracking are important parts of help desk systems and field service applications. Siebel Communications tracks purchases, allows you to create an asset before purchase, and allows you to track the asset's location. The asset management system records the location of serialized products and product components, and tracks the movement of these assets from inventory locations to customers or employees.

Assets cannot be deleted, so even inactive services remain in the dialog boxes for selection.

End users can use these methods to create or modify assets:

- Manually in the Assets screen.
- Manually in the Activity Part Tracker view, provided the product is serialized. This would typically be done by a field service agent. For more information, see *Siebel Field Service Guide*.
- Automatically using the Siebel Communications application's order management process. For more information, see *Siebel Order Management Guide Addendum for Industry Applications*.

New or modified asset records can also be automatically received from an integrated third-party asset management system. For more information, see *Siebel Enterprise Integration Manager Administration Guide*.

Scenario for Assets in Siebel Communications

This scenario is an example of a sequence performed by a customer service representative (end user). Your company may follow a different sequence according to its business requirements.

A CSR processes an order for a telecommunications service, which creates an asset for the root service and each component. The customer also orders a backup system, for which the CSR creates an asset. The CSR associates the backup system asset with the customer's service as a related asset.

At a later time, the customer calls to report a product failure. Noticing that the service has components, the CSR views their details to identify the failed component.

The CSR reviews the history of services for the asset and sees nothing out of the ordinary. The CSR creates a service request for the problem and associates it with the asset component.

A few weeks later, the customer calls again with a suggestion for improving the service. The CSR enters a change request and associates it with the customer's asset.

For another customer, the billing system shows an exception (usage data beyond the normal range). This alerts the CSR, who contacts the customer to verify the usage before determining if the service should be suspended.

Figure 11 summarizes the sequence an end user might use to manage asset information in Siebel Communications:

Figure 11. Example of Sequence for Assets
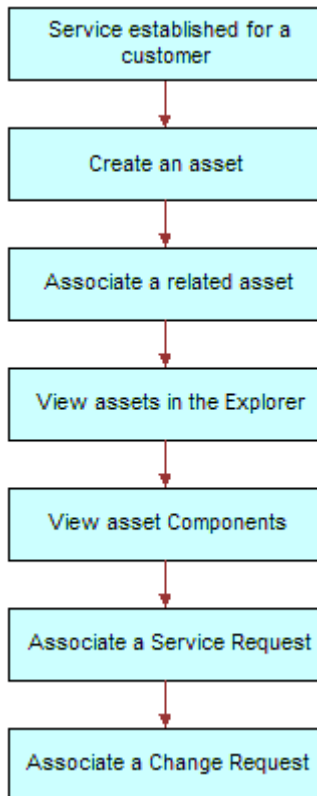
Creating an Asset in Siebel Communications (End User)

End users can create assets and enter asset information in Siebel Communications, as shown here.

NOTE: Assets can also be created through the order management module. For instructions, see *Siebel Order Management Guide Addendum for Industry Applications*.

To create an asset

1   Navigate to the Assets screen.

2 Add a new record to the Assets list, and complete the necessary fields in the record and the More Info form. To access more fields, click the show more button in the form.

Some fields are described in the following table.

Field	Comments
Account	Account associated with the asset.
Asset #	Populated with a default number generated by Siebel Communications. Accepts any string consisting of 100 or fewer characters.
Qty	Quantity of the asset.
Serial #	Displays either the serial number set in the service point or the service ID from the order.

Associating Related Assets with a Primary Asset in Siebel Communications (End User)

End users can associate one or more assets with another asset and designate their relationships, such as backup or option. An asset with which other assets are associated is a *primary asset*.

To associate a related asset with a primary asset

1 Navigate to the Assets screen.

2 From the Show drop-down list, select All Assets.

3 In the Assets list, click the name of the primary asset.

4 Click the Relationships view tab.

5 In the Relationships list, add a record and complete the necessary fields.

Viewing Hierarchical Information for an Asset in Siebel Communications (End User)

End users can view the hierarchical information for assets, including the relationships of assets and their components.

To view hierarchical information for an asset

1 Navigate to the Assets screen.

2 In the link bar, click Assets Explorer.

3 In the explorer tree, select an asset.

4 Expand the asset branch to display subsidiary records.

When you click the asset name in the explorer tree, the Assets list highlights the asset selected in the explorer and displays further details on the right side of the view. The fields are the same as those in the Assets lists in the All Assets or My Assets view.

Creating a Transaction for an Asset in Siebel Communications (End User)

An asset transaction captures the movement of components of an asset, such as installation or part replacement. End users can create transactions for an asset.

To create a transaction for an asset

1 Navigate to the Assets screen.

2 From the Show drop-down list, select All Assets.

3 In the Assets list, click the name of the asset.

4 Click the Transactions view tab.

5 In the Transactions list, add a record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Asset #	Number of the subasset (component) associated with the transaction (for example, the part installed in the main asset).
Transaction	Date and time of the transaction.

Viewing Components Associated with an Asset in Siebel Communications (End User)

End users can view components that are associated with an asset. Components or subassets are generally set up when the asset is created.

NOTE: Components are automatically added, as appropriate, when you add some transactions in the Transactions view.

To view components associated with an asset

1 Navigate to the Assets screen.

2 From the Show drop-down list, select All Assets.

3 In the Assets list, click the name of the asset.

4 Click the Components view tab.

The Components list displays information about the components.

Adding a Service Request Associated with an Asset in Siebel Communications (End User)

End users can add service requests associated with an asset.

To add a service request associated with an asset

1 Navigate to the Assets screen.

2 From the Show drop-down list, select All Assets.

3 In the Assets list, click the name of the asset.

4 Click the Service Requests view tab.

5 In the Service Requests list, add a record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Last Name	Name of the account contact.
Owner	Owners of the service request. You can select more than one owner.
SR #	Unique, system-assigned number for the service request.

Adding a Change Request Associated with an Asset in Siebel Communications (End User)

End users can add change requests associated with an asset by either creating new change requests
or associating existing change requests with an asset.

To add a change request associated with an asset

1 Navigate to the Assets screen.

2 From the Show drop-down list, select All Assets.

3 In the Assets list, click the name of the asset.

4 Click the Change Requests view tab.

5 In the Change Requests list, add a record and do one of the following:

■ Select an existing change request to associate with the asset.

■ Add a new change request and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Area	General product area where the change request has occurred.
Owner	Person assigned to deal with the change request.
Priority	Priority assigned to fixing this problem.
Subarea	Kind of product addressed by this change request.
Substatus	Indicates if this change request has been assigned to an employee for resolution.
Type	Type of change request.

Viewing Service Points and Services in Siebel Communications (End User)

End users can view the services associated with each service point and usage details for each service, but they cannot add a service point from this view. For instructions for adding a service point, see "To add a service point and associate it with a premise" on page 65.

Services are associated with service points when a CSR submits a New or Modify order for a service. When a CSR submits a Disconnect order, the service is made inactive. For more information, see the chapter about the employee use of order management in *Siebel Order Management Guide Addendum for Industry Applications*.

To view service point and service information

1 Navigate to the Assets screen.

2 From the Show drop-down list, select All Assets.

3 In the Assets list, click the name of the asset.

4 Click the Service Point Services view tab.

5 To see various types of usage information for a service:

a In the Service Point Services list, select the service.

b In the Usage History view, from the drop-down list, select an option.

9 Opportunities in Siebel Communications

An opportunity is any lead that could result in a sale. Some opportunities are generated from campaign leads, while others are created by your company's sales representatives. Through Siebel Communications, sales representatives can manage their sales opportunities for business and residential customers. Specifically, they can:

■ View a list of all opportunities in the database or only those opportunities specifically assigned to them

■ Create new opportunities

■ Track the status of an opportunity through the sales cycle, from creation to closure

■ Update information about opportunities as they move through the sales cycle

■ Generate quotes based on opportunities

■ Use opportunity profiles to record additional information and review customer responses to predefined questions

Administrators involved with opportunities will benefit from reading this chapter. It describes how your CSRs create and update opportunities. After becoming familiar with the end-user procedures, you can customize the software to fit your company's needs.

For information about hierarchical products or multiple price types with recurring and nonrecurring fees, see these guides:

■ *Product Administration Guide*

■ *Pricing Administration Guide*

■ *Siebel Order Management Guide Addendum for Industry Applications*

Scenario for Opportunities in Siebel Communications

This scenario shows a sequence of procedures performed by a sales representative (end user). Your company may follow a different sequence according to its business requirements.

While attending a trade show, a sales representative meets the director of a small company, who expresses interest in purchasing several products from the sales representative's company. She asks the prospective customer to complete a form and assures him that she will be in contact with specific product pricing.

Back at her office, the sales representative creates a new account and enters contact information in Siebel Communications. Then she creates a new opportunity and associates it with this new account.

As part of the opportunity description, she indicates the probability for the sale, estimates the potential revenue for the sale, and designates the stage of the sale.

Next she associates products with the opportunity and specifies product information, such as the
product type, quantity, and pricing.

To evaluate some preliminary quotes for the prospective customer, she creates several quotes. For
products containing subproducts, she selects the top-level product name to ensure proper revenue
calculations. She also reviews setup fees and recurring fees for the products.

She calls the prospective customer to set up a meeting to go over her quotes. During that
conversation, she determines that he might also be interested in another product that her company
offers. She updates the product information and notices that the additional product triggered an
overall discount generated by the rules established through Siebel Communications.

The prospective customer also mentions that his company is expanding to an additional location. The
sales representative enters that location as a related site for the same opportunity.

After confirming the meeting for the next day, she hangs up and continues her preparations for the
meeting. While doing so, it occurs to her that another customer might be able to take advantage of
the same discount. She enters that customer account as a partner for the opportunity.

Figure 12 summarizes the sequence an end user might use with opportunities in Siebel Communications:
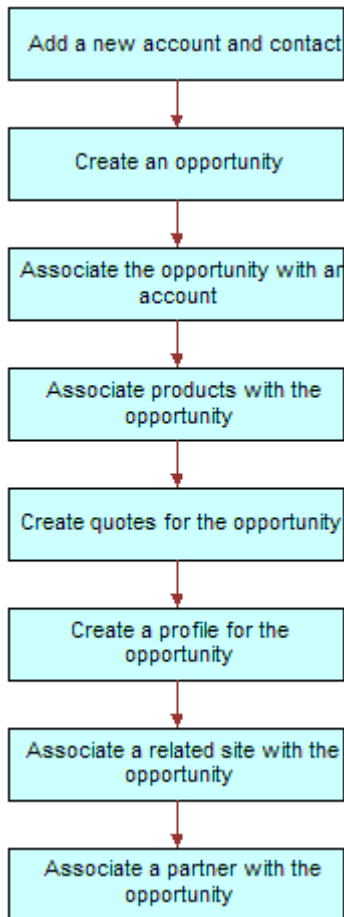

Figure 12. Example of Sequence for Opportunities

Creating an Opportunity in Siebel Communications (End User)

An opportunity is generated in the Campaigns screen or is added manually. Every time end users identify an opportunity, they should create a new record.

To create an opportunity

1   Navigate to Opportunities > Opportunity List.

2 In the Opportunity list, add a new record, and complete the necessary fields in the new record
and the More Info form. To access more fields, click the show more button in the form.

Some fields are described in the following table.

Field	Comments
Channel	Distribution strategy this opportunity plays in your organization.
Expected Value	Automatically populated when you select Probability and Revenue Amount fields.
Primary	You are assigned as primary for opportunities you create. Only managers can change the Primary field for a sales team member.
Probability %	Probability of completing the sale.
Revenue	Expected revenue in specific currency.
Sales Team	Sales team member associated with the opportunity.
Source	Source of the data. Source Type field reflects the source type associated with this selection.

Associating an Account with an Opportunity in Siebel Communications (End User)

End users can associate an opportunity with an account. This allows them to track all important
information for a customer.

To associate an opportunity with an account

1 Navigate to the Opportunities screen.

2 Select the opportunity.

3 In the Opportunities list, in the Account field, select an account in the dialog box.

Associating a Product with an Opportunity in Siebel Communications (End User)

End users can associate products with an opportunity and provide customers with detailed
information on the products that interest them.

To associate a product with an opportunity

1   Navigate to the Opportunities screen.

2   In the Opportunity list, click the name of an opportunity.

3   Click the Products view tab.

4   In the Products list, add a record and complete the necessary fields.

5   In the Product field, select a product in the dialog box.

Creating a Quote for an Opportunity in Siebel Communications (End User)

End users can create a quote for an opportunity, view all quotes for an opportunity, or update an opportunity with product information taken from the Quotes view.

For the updating opportunity feature to work, certain conditions must be met:

■   In the Product Administration view, the number of occurrences must be > 0 for the product.

   For more information, see *Product Administration Guide*.

■   In the Price List list in the Quotes screen, all products end users can associate with the opportunity or quote must be defined as Price List line items.

■   In the Line Items view of the Quotes screen, the Extended Price of the quote line item must be > 0.

■   In the Quotes list in the Opportunities screen, the Price List must be selected (see "To associate a product with an opportunity" on page 83).

If these conditions are not met, Siebel Communications cannot generate revenue line items for the Opportunity. The revenue will not be accurate until a quote is configured and the opportunity is updated from it.

To create a quote for an opportunity

1   Navigate to the Opportunities screen.

2   In the Opportunity list, click the name of an opportunity.

3   Click the Quotes view tab.

4   In the Quotes list, click Auto Quote.

   A new quote is created with default values in some fields.

5   In the Price List field, select a price list.

6   Complete the necessary fields for the new quote.

7   In the Quotes list, drill down on the Name hyperlink.

   The Quote form appears with the Line Items view beneath it.

8   In the Line Items list, add a record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Extended Price	Calculated by multiplying the net price by the quantity.
MRC Subtotal	Monthly recurring charge.
NRC Subtotal	Nonrecurring charge.
UofM	Unit of Measure depends on price type. For a one-time fee, value is for each unit. For recurring fees, value indicates time period, such as per month or per quarter.

9   To modify line item details:

a   Scroll down and click the Line Item Detail subview tab.

NOTE: Administrators specify much of the product information through the Product Administration screen. When the products are added to the quote as line items, default product information is populated for some line item fields.

b   To adjust a discount, edit the Disc %, Disc Amount, and Disc Price fields in the Line Item Detail form.

NOTE: For further information about line item details, see *Siebel Order Management Guide Addendum for Industry Applications*.

10 In the Quote form, click the Update Opportunity button.

This adds revenue line items to the opportunity for every one-time or recurring charge for every product.

Creating a Profile for an Opportunity in Siebel Communications (End User)

End users can launch a call script that helps them define qualifying information about an opportunity. The script guides them through a series of questions to answer.

After answering the questions, end users can later analyze the information. For example, they can use charts to see which opportunities qualify as part of their target market or they can use queries to find opportunities that match specific criteria.

To create a profile for an opportunity

1   Navigate to the Opportunities screen.

2   In the Opportunity list, click the name of an opportunity.

3   Click the Profile view tab.

4 In the Profile form, click Script to launch the wizard.

5 Answer the questions in the script.

Associating a Site with an Opportunity in Siebel Communications (End User)

The Opportunity Account defines the primary account related to the opportunity. End users can
associate accounts for satellite offices or subsidiaries to the opportunity.

To associate a related site with an opportunity

1 Navigate to the Opportunities screen.

2 In the Opportunity list, click the name of an opportunity.

3 Click the Related Sites view tab.

4 In the Related Sites list, add a record.

5 In the Account field, select an account in the dialog box.

Associating a Partner with an Opportunity in Siebel Communications (End User)

The Opportunity Account field defines the primary account related to the opportunity. When
additional accounts are involved in an opportunity, end users add them to the opportunity as
partners.

For an account to appear in the list of partners, it must have a check mark for the Partner field in its
account form.

To associate a partner with an opportunity

1 Navigate to the Opportunities screen.

2 In the Opportunity list, click the name of an opportunity.

3 Click the Partners view tab.

4 In the Partners list, add a record.

5 In the Add Partner dialog box that appears, select an account.

The dialog box lists only accounts that have the Partner field selected in the Accounts screen,
More Info view.

Additional End-User Tasks for Opportunity Management in Siebel Communications

For descriptions of other procedures related to opportunities, see the *Siebel Bookshelf*.

Account and Contact Creation

When adding a prospective customer to the database, end users often first create an account and enter contact information. For more information about creating a customer account, see Chapter 3, "Accounts in Siebel Communications." For more information about entering a contact, see Chapter 5, "Contacts in Siebel Communications."

10 Billing in Siebel Communications

This chapter describes the procedures for handling customer inquiries about their invoices, usually performed by customer service representatives (CSRs). Using Siebel Communications, CSRs can retrieve past invoices, current unbilled charges, and other invoice details. CSRs can also arrange payment plans, record payments against an outstanding balance, or request adjustments to the customer's records in the event of an incorrect bill.

Administrators involved with billing will benefit from reading this chapter. It describes how your CSRs access billing information and update billing accounts. After becoming familiar with the end-user procedures, you can customize the software to fit your company's needs.

Billing processes are integrated with an external billing system that Siebel Communications accesses to retrieve information, such as the customer's last statement. That information is stored temporarily in Siebel database tables.

Performance of the billing screens depends on both the configuration and speed of retrieval from the external billing system. Configurators can set up Siebel Communications so that all messages are sent and received from the back-office application in real-time or batch mode. The results of these messages can also be stored in Siebel Communications database tables, allowing CSRs to resolve them in real-time.

Your company is responsible for performing the integration of Siebel Communications with billing systems. For detailed information, see *Overview: Siebel eBusiness Application Integration Volume I*.

For instructions on setting up profiles that are used to run credit ratings, record billing preferences, or store tax exemption information, see .

Scenario for Billing in Siebel Communications

This scenario shows a sequence of procedures performed by a CSR (end user). Your company may follow a different sequence according to its business requirements.

A CSR at a telecommunications company receives a call from a business customer. The customer has just received his December invoice for wireless services and believes that his company was overcharged for international phone calls.

The CSR verifies the caller's identity and then accesses the customer's billing information, primarily maintained in an external billing system. With the Siebel front-office system, the CSR can access billing information as if it were stored locally.

The customer has a specific question about various international calls in his December invoice. The CSR looks at a list of recent invoices and finds the December statement. She brings up an image of the invoice and notices that the customer has been charged $300 for international calls.

The CSR wants to discuss the individual international calls to confirm the company made these calls. She first retrieves the customer's billing details information for the December billing period. She then sorts the calls by rate plan (that is, international) and informs the customer that all calls were made to the same number in Frankfurt, Germany. She also checks to see the other invoices for other months, and sees if this international calling pattern is consistent. It is not. The customer realizes that an employee has been making calls without the customer's knowledge.

The CSR mentions to him that he can request a block placed on his account for all international calls by creating a fraud profile for his account. The customer asks to check his calls for the current month to make sure that there will not be unexpected surprises in the next month's invoice. The CSR reviews the unbilled charges and reports that there are no unusual charges.

While looking at the invoice details, however, she notices that the customer is being charged a city tax, from which his company should be exempt. The customer has been paying this amount for the last few months. To reimburse him for the error, she can enter an adjustment request against either the entire invoice or specifically against a line item in that invoice. She decides to associate the request with the invoice line item in this case.

She enters the amount of the tax and explains the reason for the request. She then submits the adjustment for processing by the external billing system. If it is accepted, this adjustment amount will be credited immediately to the balance of the account of the customer and will be printed on the customer's next invoice.

Before she forgets, she accesses the customer's exemption profile and makes a note that he should be exempt from city tax, so that he will not be incorrectly charged in the future.

The customer would also like to pay his outstanding balance. The CSR finds the most recent invoice, which is for the month of January. She creates a payment against the invoice, enters the customer's credit card information, and submits the payment for processing by the external billing system.

Before hanging up, the customer has one last request. He would like to start receiving invoices by email. The CSR goes to his billing profile, selects the appropriate Bill Media, and enters his email address. The customer thanks him for his time and hangs up.

After lunch, the CSR receives a phone call from another customer, who needs to arrange a payment plan. His recent invoice was considerably higher than normal, so he wants to spread out the payment over the next three months. After the CSR verifies that his credit is still good, she enters the payment arrangement request and notes the special circumstances. The external billing system processes the request and approves it in a few moments. The CSR informs the customer that his request has been accepted and that he should look for that additional amount in the next three invoices.

Figure 13 summarizes the sequence of procedures an end user might use to update billing information in Siebel Communications:
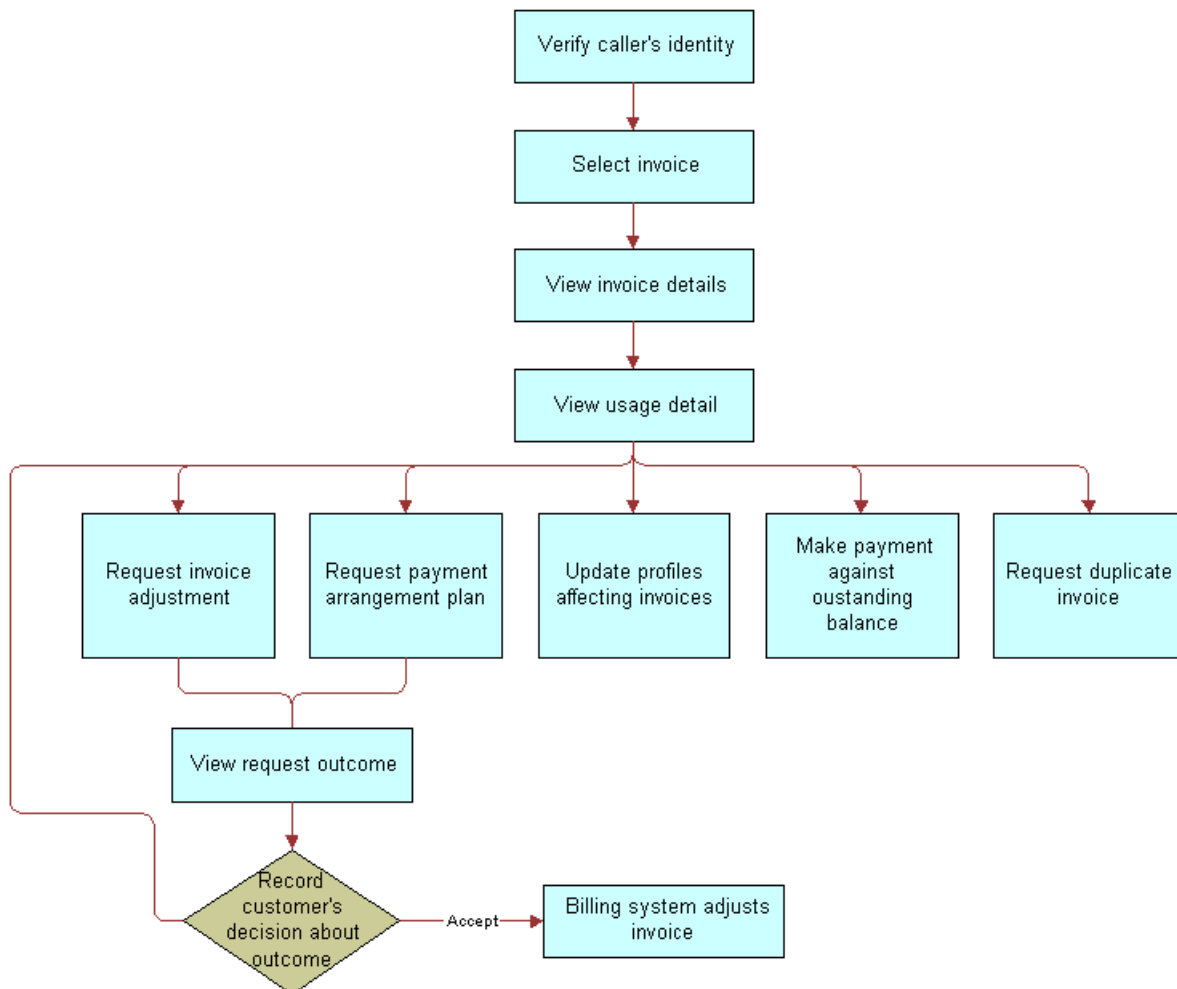

Figure 13. Example of Sequence for Billing

Generating Credit, Fraud, and Usage Information in Siebel Communications

Siebel Communications contains a view for administrators that simulates an external billing system. From that view, you can create credit, fraud, and usage details for a billing account. End users do not have access to the view.

CAUTION: Siebel Communications billing administration views are part of the Billing Management option. Exclusively for *testing purposes*, these views are used to simulate an external billing system and therefore should not be used in a production environment. For this reason, they are not part of release documentation.

To generate credit, fraud, and usage information

1 Navigate to the Billing Data Administration screen.

2 In the Billing Accounts list, click the name of the account.

3 Click the Credit Alerts, Fraud Alerts, or Usage Detail view tabs.

4 In the appropriate list, add a record and complete the necessary fields.

Setting Up the Invoice Image Feature in Siebel Communications

End users can request the image of a customer's bill from the external billing system, if that feature has been set up by the administrator. The image is returned in HTML format and is not stored within the Siebel application.

To set up the invoice image feature

1 Navigate to Administration - Integration > WI Symbolic URL List.

2 In the Host Administration list, add a record and complete this information:

Field	Comments
Name	Name of your invoice host. This is an identifier and should match the Virtual Name.
Virtual Name	Name of your invoice host.

3 From the Show drop-down list, choose Symbolic URL Administration.

4 In the Symbolic URL list, select the BillStatement record.

NOTE: In the Name field, run a query for BillStatement. BillStatement is the name of the control defined in *Using Siebel Tools*.

5 In the Bill Statement record, complete this information:

Field	Comments
Fixup Name	InsideApplet displays the image within the current applet. OutsideApplication displays the image in a new pop-up window.
Host Name	Name of your invoice host. Select the name entered in Step 2.
URL	URL for the bill image to appear.

6 Restart the application.

The image now points to the specified URL.

Accessing or Updating Billing Information in Siebel Communications (End User)

Siebel Communications allows end users to access the same invoice information through different views. By selecting one view or another, end users can find the information most relevant to them, according to the procedure they need to perform at that moment.

Most views allow end users to record interactions with a customer and to update the customer's information, depending on the system setup and the end user's access rights.

From these views, end users can access information on billing, such as the account balance, invoice history, payment history, and adjustment history.

NOTE: The procedures described in this chapter contain the most frequently used method for performing each task, including which view to access, although other methods may exist.

End-User Views

The end-user views are:

■ **Billing Portal view (call center agent).** The Billing Portal view summarizes the billing information that a call center agent would most likely need to review while talking to a customer. It also makes it easy for call center agents to handle the most common transactions associated with invoices.

The Billing Portal view serves as a starting point for most customer inquiries. Among other tasks, the Billing Portal views allow call center agents to:

  ■ Review the account status, such as the balance, delinquency information, and pending financial transactions (credit and debit) that have not yet been applied to the balance.

  ■ View the most recent invoices of a customer and drill down to access detailed information about an invoice.

  ■ View the history of payments and adjustments.

    This is useful if customers claim that they have already made a payment and that the balance is not correct.

  ■ Access the usage history of different services that the customer has so that unexpected hikes can be explained to the customer.

■ Begin transactions, such as recording payments or adjusting balances.

Table 13 describes the information available in the Billing Portal view.

Table 13. Billing Portal View

Views	Description
Account	Displays account information that corresponds to the Accounts screen, More Info view. End users can edit this information.
Account Balance	Displays balance information for the account. Retrieves this information from an external billing system. Information is read-only. **Pay button.** Takes end users to the Invoices screen, Payments view, where a payment has been created to settle the entire account balance. **Refresh button.** Updates the information with the most current data.
Invoice History	Displays information from the Invoices screen. Information is read-only. **Invoice # hyperlink.** Takes end users to the Invoices screen, Line Items view.
Payment History	Displays the payment history for the account. Information is read-only. **Payment # hyperlink.** Takes end users to the Invoices screen, Payments More Info view, Invoices subview, where they record payments.
Adjustment History	Displays a subset of the information from the Invoices screen, Adjustment Requests view. Information is read-only. **Request # hyperlink.** Takes end users to the Adjustment Requests view, Line Items subview.
Additional Info	**Billing Profile hyperlink.** Takes end users to the Accounts screen, Profiles view, Billing Profile form. **Usage Detail hyperlink.** Takes end users to the Accounts More Info form, Usage Detail view. **Unbilled Charges hyperlink.** Takes end users to the Account More Info form, Unbilled Charges view.

■ **Invoices views (call center agent).** The Invoices views allow call center agents to view all bill details. These views are generally accessed to reply to customer complaints regarding a specific charge on the bill. The Invoices views also allow call center agents to start transactions, such as adjusting an invoice, recording a payment against the invoice, requesting a bill duplicate.

Sequence for Accessing Billing Information

To resolve customer inquiries, end users first locate the billing account, where they generally record payments. For most other transactions, end users record information at the invoice level.

End users can access the most recent invoice or retrieve past invoices. They can view invoice details, such as line items, after selecting the invoice. In addition, they can view the image of an already-sent invoice bill in HTML format.

NOTE: Some customers have a consolidated billing account for a number of service items. Siebel Communications allows end users to view charges associated with a billing account, service account, or parent account. For more information about accounts and subaccounts, see Chapter 3, "Accounts in Siebel Communications."

To access the Billing Portal view

1 Navigate to the Accounts screen.

2 In the Accounts list, click the name of the account.

3 Click the Billing Portal view tab.

The Billing Portal view appears with several lists and forms summarizing the billing information for that account.

To access the Invoice views

1 Navigate to the Invoices screen.

2 In the Show drop-down list, select All External Invoices.

When you select All External Invoices, the Invoices list displays the bills that have been generated by an external system. The information found in the Invoices list (header information) is generally stored in the Siebel database. However, due to the large volume of data, it is not recommended that your company store the Invoice Line Item information in the Siebel database, but instead access that data in real time through integration.

NOTE: When you select All Invoices from the Show drop-down list, the Invoices list displays all invoices, including external invoices.

3 In the Invoices list, perform a query in the Bill To Account field for the account name.

The Invoices list displays all invoices for that account, sorted by invoice number.

4 In the Invoices list, select the invoice you want to view.

5 Click a view tab to access specific information for that account.

To view invoice line items

1 Navigate to the Invoices screen.

2 In the Show drop-down list, select All External Invoices.

3 In the Invoices list, drill down on the Invoice # hyperlink.

The Invoices form appears with the Line Items list beneath it. From the Invoices form, end users can also click the Pay, Adjust, or Usage Detail buttons to continue with a transaction.

4   If the service item does not appear in the list, perform a query.

For example, enter the telephone number in the Number Called field.

To view the image of an invoice

1   Navigate to the Invoices screen.

2   In the Show drop-down list, select All External Invoices.

3   In the Invoices list, select an invoice.

4   Click the Invoice Image view tab.

The invoice appears as a graphic at the URL that the administrator set up. For instructions on setting up this feature, see "Setting Up the Invoice Image Feature in Siebel Communications" on page 90.

To view the invoice history

1   Navigate to the Accounts screen.

2   In the Accounts list, click the name of an account.

3   Click the Billing Portal view tab.

The Invoice History list displays the most current records for the invoice.

4   If the information does not appear in the Invoice History, perform a query to access the correct records.

5   Drill down on the Invoice # hyperlink.

6   In the Line Items list, click the view tab for the information you want to view.

Entering Payment Against an Outstanding Balance in Siebel Communications (End User)

End users can enter a payment for a customer at either the account level or the invoice level, according to the accounting system used at their company:

■   **Account-Level Payments.** Associate the payment against the account when the company's accounting method applies the payment against the account balance (Balance Forward).

■   **Invoice-Level Payments.** Associate the payment against one or more invoices when the company's accounting method applies the payment against the bill balance (Open Item).

To record a payment at the account level

1   Navigate to the Accounts screen.

2   In the Accounts list, click the name of an account.

3 Click the Billing Portal view tab.

4 In the Account Balance form, click Pay.

The Payments list appears with the account information already filled in for the new record.

5 In the field, select a method for payment.

6 In the Payments list, complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Payment #	System-generated number.
Payment Date	Automatically populated.
Payment Amount	Automatically populated based on the account and account balance. Status must be set to Open to enter the amount. Otherwise, it is read-only.
Status	Set automatically to Open. End users can edit this record as long as the Status is not Submitted.

7 In the More Info form, complete additional fields, if necessary. The fields displayed depend on the Payment Method selection you made.

■ **EFT.** Deducts payment from the customer's bank account.

Field	Comments
Bank Account #	Customer's bank account number.
Account Holder Name	Name under which the customer's bank account is registered.
Bank Branch	Reference number of the specific branch of the customer's bank.

■ **Credit Card.** Charges payment to the customer's credit card.

■ **Reference.** Captures payment details that were made at a third-party location, such as post offices or banks.

Field	Comments
Location	Location where the payment was made.
Reference #	Reference number of the payment.

8 Click Submit.

To record a payment against one invoice

1 Navigate to the Invoices screen.

2 From the Show drop-down list, select All External Invoices.

3 In the Invoices list, click Pay.

   A new record is created with the payment number, amount, date, and status already populated.

4 Continue with Step 5 of "To record a payment at the account level" on page 94, and perform the remaining steps in the procedure.

To record a payment against multiple invoices

1 Navigate to the Accounts screen.

2 In the Accounts list, click the name of the account.

   NOTE: End users can also begin this procedure from the Billing Portal view. For information, see Table 13 on page 92.

3 Click the Payments view tab.

4 In the Payments list, add a payment.

5 Drill down on the Payments # hyperlink.

   The Payment Detail form appears with view tabs beneath it.

6 Click the Invoices view tab.

7 In the Invoices list, enter the amount that you want to apply to each invoice in the Payment Amount field.

8 In the Payment Detail form, enter the total amount.

To view the payment history

1 Navigate to the Accounts screen.

2 In the Accounts list, click the name of an account.

3 Click the Billing Portal view tab.

   The Payment History list displays the most current records for the account.

Viewing Usage Details in Siebel Communications (End User)

End users can view usage details for an invoice.

To view usage details

1 Navigate to the Accounts screen.

2 In the Accounts list, click the name of an account.

3 Click the Billing Portal view tab.

4   Scroll down to the Additional Info list.

5   Drill down on the Usage Detail hyperlink.

The Usage Detail list appears with the Usage History list beneath it.

6   In the Usage History list, select the data you want to view from the drop-down list.

Viewing Unbilled Charges in Siebel Communications (End User)

End users can view unbilled charges for an account. The total of all unbilled charges appears in the Billing Portal view, but for a breakdown of the charges, end users can follow this procedure.

NOTE: End users can also begin this procedure from the Billing Portal view. For information, see Table 13 on page 92.

To view unbilled charges

1   Navigate to the Accounts screen.

2   In the Accounts list, click the name of an account.

3   Click the Unbilled Charges view tab.

The Unbilled Charges view displays the charges incurred since the last invoice.

Some fields are described in the following table.

Field	Comments
Next Invoice Date	Date the next statement will be generated.
NonRecurrng Charge	Current period's nonrecurring charges.
Recurring Charges	Current period's recurring charges.
Surcharges	Current period's taxes and surcharges.
Total Charges	Displays the total unbilled charges for the current period. Recurring charges+Nonrecurring Charges+Taxes and Surcharges=Total Charges.

Process of Creating Adjustments in Siebel Communications (End User)

End users must sometimes adjust customer bills for various reasons, such as to apply credit to compensate for an overcharge.

To create an adjustment, perform the following tasks:

1   "Requesting an Adjustment" on page 98

For more information about integrating the billing component with an external billing system, see
Chapter 15, "Defining Integration Workflows for Siebel Communications."

Requesting an Adjustment

End users can associate the adjustment request with the entire invoice or with a specific line item in
the invoice. Because the billing component is integrated with an external billing system, an
adjustment request is sent to the external billing system, which processes the request.

This task is a step in "Process of Creating Adjustments in Siebel Communications (End User)" on
page 97.

NOTE: End users can also begin this procedure from the Billing Portal view. For information, see
Table 13 on page 92.

To request an adjustment to an entire invoice

1 Navigate to the Invoices screen.

2 From the Show drop-down list, select All External Invoices.

3 In the Invoices list, select an invoice.

4 Click the More Info view tab.

5 In the More Info form, click Adjust.

The Adjustment Requests form appears with some information populated.

6 Verify the fields and complete any necessary fields.

To request an adjustment to a line item in an invoice

1 Navigate to the Invoices screen.

2 From the Show drop-down list, select All External Invoices.

3 In the Invoices list, select an invoice.

4 Click the Line Items view tab.

The Adjustment Requests form appears with the Line Items list beneath it. In the Adjustment
Requests form, the Status defaults to Open and the Type defaults to Credit. The list displays a
history of adjustment requests.

5 Select the line item you want to adjust, and click Adjust.

A new record is created with some information already populated.

6 Complete any necessary information, such as the reason for the Adjustment, and click Submit.

Siebel Communications processes the request and populates the fields with the results.

Viewing an Adjustment Request Outcome

Typically, the account adjustments and payment arrangement plans are determined in the back office, either manually or through a system. The back-office system then sends the outcome of the request to Siebel Communications.

End users can view the request outcome as well as view the history of adjustment requests.

This task is a step in "Process of Creating Adjustments in Siebel Communications (End User)" on page 97.

To view the outcome of an adjustment request

1 Navigate to the Invoices screen.

2 From the Show drop-down list, select All External Invoices.

3 In the Invoices list, select an invoice.

4 In the Invoices list, drill down on the Invoice # hyperlink.

The Invoices form appears with the view tabs beneath it.

5 Click the Adjustment Requests view tab.

6 In the Adjustment Request list, review the Amount Approved field.

These fields show the external billing system's response to the bill repayment plan request. The Status field is updated automatically.

To view the history of adjustment requests

1 Navigate to the Accounts screen.

2 Click the name of an account.

3 Click the Adjustment Requests view tab.

The Adjustment Requests list displays all adjustment requests that exist for the account.

Recording a Customer's Decision About Adjustment Outcome Terms

After consulting with the customer, end users can record the customer's decision to accept or reject the outcome terms.

This task is a step in "Process of Creating Adjustments in Siebel Communications (End User)" on page 97.

To record the customer's decision about the adjustment outcome terms

1 Navigate to the Invoices screen.

2   From the Show drop-down list, select All External Invoices.

3   In the Invoices list, drill down on the Invoice # hyperlink.

The Invoices form appears with the view tabs beneath it.

4   Click the Adjustment Request view tab.

5   In the Adjustment Requests list, select the request record.

6   In the Customer Decision field, select information to indicate the customer's decision to accept or reject the outcome terms.

NOTE: If your company's policy does not require a customer decision regarding a bill adjustment outcome, the customer decision fields may not be available.

Process of Making Payment Arrangements in Siebel Communications (End User)

End users can request a special arrangement if a customer is unable to pay for services when a bill payment is due. The customer may request a payment plan or a deferral of payment. In response, your company can approve the request, reject the request, or propose its own terms. The response may depend on factors such as corporate policy, customer credit history or credit worthiness, and longevity of the customer's association with your company.

To make a payment arangement, perform the following tasks:

1   "Requesting a Payment Arrangement (End User)" on page 100

2   "Viewing the Outcome of a Payment Arrangement Request (End User)" on page 101

3   "Recording a Customer's Decision About Payment Arrangement Terms (End User)" on page 102

For more information about integrating the billing component with an external billing system, see Chapter 15, "Defining Integration Workflows for Siebel Communications."

Requesting a Payment Arrangement (End User)

Because the billing component is integrated with an external billing system, a payment arrangement request is sent to the external billing system, which processes the request and generates a response.

This task is a step in "Process of Making Payment Arrangements in Siebel Communications (End User)" on page 100.

To request a payment arrangement

1   Navigate to the Invoices screen.

2   From the Show drop-down list, select All External Invoices.

3   In the Invoices list, select an invoice.

4 Click the Payment Arrangements view tab.

5 In the Payment Arrangements list, add a record and enter information for the request.

Some fields are described in the following table.

Field	Comments
Number of Installments	For a single-payment deferral plan, this is 1. When you click on the Installment Amount field, the amount is automatically generated.
Installment Amount	When you click on this field, the amount is generated according to the Original Amount Due and Number of Installment data.

The external billing system processes the request and populates the Payment Arrangements
Outcome view at the bottom of the screen.

Viewing the Outcome of a Payment Arrangement Request (End User)

Siebel Communications receives the outcome of the request, which is generated by the external
billing system.

This task is a step in
.

To view the outcome of a payment arrangement request

1 Navigate to the Invoices screen.

2 From the Show drop-down list, select All External Invoices.

3 In the Invoices list, drill down on the Invoice # hyperlink.

The Invoices form appears with the view tabs beneath it.

4 Click the Payment Arrangements view tab.

5 Scroll down to the Payment Arrangements Outcome form to review the external billing system's
response to the bill repayment plan request.

To view the history of payment arrangements

1 Navigate to the Invoices screen.

2 From the Show drop-down list, select All External Invoices.

3 In the Invoices list, select an invoice.

4 Click the Payment Arrangements view tab.

5 In the Payment Arrangements list, select Payment Arrangements or Payment Arrangements
Details from the drop-down list.

6 If the information does not appear in the Payment Arrangements list, perform a query to access
the correct records.

Recording a Customer's Decision About Payment Arrangement Terms (End User)

After consulting with the customer, end users can record the customer's decision to accept or reject
the payment plan that their company is offering.

This task is a step in "Process of Making Payment Arrangements in Siebel Communications (End User)"
on page 100.

To record the customer's decision about the payment outcome terms

1 Navigate to the Invoices screen.

2 From the Show drop-down list, select All External Invoices.

3 In the Invoices list, select an invoice.

4 Click the Payment Arrangements view tab.

5 Scroll down to the Payment Arrangements Outcome form and select information in the Customer
Decision field to indicate the customer's decision to accept or reject the terms.

   NOTE: If your company's policy does not require a customer decision regarding a bill repayment
   plan outcome, the customer decision fields may not be available.

Requesting a Duplicate Invoice in Siebel Communications (End User)

Occasionally, a customer might request a copy of an invoice.

To request a duplicate invoice

1 Navigate to the Invoices screen.

2 From the Show drop-down list, select All External Invoices.

3 In the Invoices list, select an invoice.

4 Click the Duplicate Request view tab.

5 In the Duplicate Request list, add a record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Address	Address to send the duplicate bill. The City, State, Zip, and Country fields are automatically populated when you select the address.
Comments	Specific directions or descriptions about the duplication process.

6 To send the invoice to a different mailing address:

a In the Duplicate Request list, select Duplicate Bill Request Details from the Show drop-down list.

b In the Address field, associate another address.

Updating a Billing Profile in Siebel Communications (End User)

When billing a customer, Siebel Communications integrates information, such as exemption information or discounts, that is stored in profiles.

To update a billing profile

1 Navigate to the Accounts screen.

2 In the Accounts list, click the name of an account.

3 Click the Billing Portal view tab.

4 Scroll down to the Additional Info form.

5 Drill down on the Billing Profile hyperlink.

6 In the Billing Profile form, update the information.

For further information about profiles, see Chapter 4, "Profiles in Siebel Communications."

Additional End-User Tasks for Billing Management

For descriptions of other procedures related to billing, see the *Siebel Bookshelf*.

Caller Verification

When receiving an inbound call, end users first verify and locate the caller. For more information about this process, see *Applications Administration Guide*.

11 Work Orders in Siebel Communications

The Work Orders module in Siebel Communications helps service providers to manage the components needed to activate a service for a customer. A *work order* is an action item that must be completed to implement an order. When an order is submitted, the back-office order processing system divides it into one or more work orders, based upon criteria, such as service provider or due dates. A work order has most of the components found in a standard order, but it deals specifically with those items that are required for the provisioning process.

By creating and tracking work orders separately, you can access the status of a sales order. This is important because work orders are executed by back-office systems, such as the provisioning system. Tracking the status of an order gives you up-to-date access to the information related to the order and can therefore convey it to a customer at any time, either through inbound contact or through outbound workflow-initiated activities.

The Communications Work Orders module works in conjunction with the Communications Order Processing module. It uses much of the work conducted during the order process and provides screens that allow you to manage work orders.

Scenario for Work Orders in Siebel Communications

This scenario shows a sequence of procedures performed by a customer service representative (end user). Your company may follow a different sequence according to its business requirements.

A customer service representative (CSR) has just completed an order for a customer, requiring three mobile phones, two pagers, an Internet connection, and an addition to their local service (voice mail). The order that the CSR created contains at least seven line items: one for each of the mobile phones, two for pagers, one for the Internet connection, and one for the local service. The CSR has given a quote for the order to the customer, who has accepted it and asked that the order be placed.

In the Order Line Items view, the CSR submits the order to the provisioning system. Since your company is a reseller of communications services (in this example), the action of submitting the order creates three work orders, based on the service provider for each of the line items. The following list shows the work order allocation:

- Three mobile phones—provided by a wireless services company
  Two pagers—provided by a wireless services company
- An Internet connection—provided by an Internet service provider
- Local service (voice mail)—provided by the local phone service provider

The work orders were created based on the service provider for each of the line items associated with the order. In this example, there are three unique providers: a wireless services provider, an Internet service provider, and the local phone service provider. The work order is separated into three separate work orders, which are then submitted to the various providers for activation.

A week later, the customer calls to check on the status of his order because he has not received his
equipment. His call is directed to a different CSR, who is able to search through his company account
to find any open orders. When the CSR has found the most recent order, he can use the hyperlink to
find the specific work orders associated with the order. When he does this, he notices that each of
the work orders is complete, except the one for the mobile phones and pagers. When he drills down
into that order, he finds some notes and activities indicating that the particular pager ordered by the
customer is on back-order. The estimated delivery date is two days from now. The CSR adds an
activity to the work order to indicate that the customer wants to be notified by email when the status
of the order has changed to complete.

Figure 14 shows the sequence of procedures that an end user might follow to manage work orders.
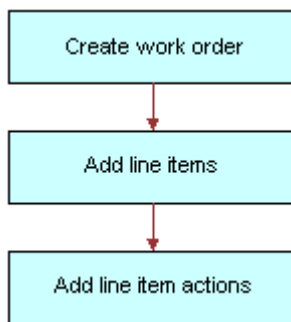
Figure 14. Example of Sequence for Work Orders

Creating a Work Order in Siebel Communications (End User)

End users can create work orders.

To create a work order

1   Navigate to the Work Orders screen.

2   In the Work Orders list, add a record and complete the necessary fields of the record and the
More Info form. To access more fields, click the show more button in the upper-right corner of
the form.

Some fields are described in the following table.

Field	Comments
Account	Master account for this order. Account # is automatically filled when a value is entered in this field.
Address	Address of the account.
Last Name	Contact for the order.

Field	Comments
Order	The sales order associated with the work order.
Provider	Vendor for the work order. Clicking the select button in this field launches a Pick Vendor dialog box.

Adding an Activity to a Work Order in Siebel Communications (End User)

End users can create an activity and associate it with a premise to:

■ Remind themselves of procedures related to a premise that they must perform.

■ Communicate procedures related to a work order that other members of the organization must perform.

Activity plans consist of a list of activities to be completed to resolve a problem. If an appropriate activity template exists, end users can select the template to populate their activities list with a defined set of activities. Then end users can customize the list, if necessary.

To associate an activity plan with a work order

1 Navigate to the Work Orders screen.

2 In the Work Orders list, click the Order Number of a work order.

3 Click the Activity Plans view tab.

4 In the Activity Plans list, add a record.

5 In the Template field, select an Activity Template.

To create an activity for a work order

1 Navigate to the Work Orders screen.

2 In the Work Orders list, click the Order Number of a work order.

3 Click the Activities view tab.

4 In the Activities list, add a record and complete the necessary fields.

Creating Work Order Line Items in Siebel Communications (End User)

End users can create line items and line item actions to be allocated for a work order.

To create line items to be allocated for the order

1 Navigate to the Work Orders screen.

2 In the Work Orders list, click the Order Number of a work order.

3 Click the Line Items view tab.

4 Scroll down and click the Line Detail subview tab.

5 In the Line Detail form, add a record and complete the necessary fields. To access more fields, click the show more button in the upper right corner of the form.

Some fields are described in the following table.

Field	Comments
Product	When you select a product, you are selecting a line item from the associated Service Order. The Action, Due Date, UoM, Price and Status fields are automatically populated with the information from the Order Line Item view.
Ship to Last Name	An existing contact can be selected in the Ship to Contacts dialog box, or a new contact can be added. The Ship to First Name field is automatically populated when you enter a value in this field. When you complete this field, the City, State, ZIP Code, and Country fields are automatically populated.
Address	An existing address can be selected in the Ship to Addresses dialog box, or a new address can be added. When you complete this field, the City, State, ZIP Code, and Country fields are automatically populated.

To add a line item action

1 Navigate to the Work Orders screen.

2 In the Work Orders list, click the Order Number of a work order.

3 Click the Line Item Actions view tab.

4 In the Line Item Actions list, add a record and complete the necessary fields.

Adding Work Order Terms in Siebel Communications (End User)

End users can add a work order term.

To add a work order term

1 Navigate to the Work Orders screen.

2 In the Work Orders list, click the Order Number of a work order.

3 Click the Terms view tab.

4 Scroll down to the second Terms form, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Freight Terms	Terms describing how to ship the order.
Payment Terms	Terms describing how the customer pays.
Return To	Return address for order items.
Status	Status of the order.

Additional End-User Tasks for Work Order Management in Siebel Communications

For descriptions of other procedures related to work orders, see the *Siebel Bookshelf*.

Work Orders and Attachments

At any time, end users can store additional information relating to a work order in the database by associating an electronic file with the work order record. For directions for associating an attachment with a record, see *Fundamentals*.

12 Service Requests and Trouble Tickets in Siebel Communications

Siebel Communications service requests and trouble tickets are primarily used by customer service representatives (CSRs) and their managers, as well as network operations center (NOC) agents.

Service requests and *trouble tickets* are database records that are used to manage problems with equipment or general requests for service. This chapter is mostly about trouble tickets, but it also explains the differences between trouble tickets and service requests and tells you where you can find more information about service requests. This chapter:

■ Guides you in setting up features that help to automate trouble ticket management

■ Describes procedures typically used by end users to create, monitor, and close trouble tickets

■ Describes procedures that you can use for overall management of trouble tickets

About Service Requests and Trouble Tickets in Siebel Communications

Service requests and trouble tickets are managed through the Service Requests and Trouble Tickets screens.

Service requests and trouble tickets perform similar functions. The main differences are:

■ Trouble tickets functionality supports parent-child relationships

■ Trouble tickets are typically used to record and track problems with the functioning of services and networks, whereas service requests are typically used to record and track general customer problems and requests. Examples of general problems and requests are billing problems, requests for new equipment, and requests for billing statements.

Initiation of Service Requests and Trouble Tickets

Service requests and trouble tickets may be initiated in several ways:

■ A customer calls the call center to report a problem with the phone line.

■ A network communications management system that is integrated with Siebel Communications automatically creates a trouble ticket record in the Siebel Communications database.

■ Agents can reassign service requests and trouble tickets to other groups or individuals for resolution. Alternatively, agents can break a service request or trouble ticket down into different activities, which can be assigned to different owners. In this case, the agent can monitor progress towards completion of the activities and close the service request or trouble ticket.

Creation of Service Requests and Trouble Tickets

Service requests and trouble tickets can be created within Siebel Communications or moved into
Siebel Communications by:

■ Customers using Siebel eService

■ Customers and partners using an Automated Call Distributor (ACD)

■ Call center agents responding to phone calls or email from customers

■ NOC agents responding to network problems

■ Automated network communications management systems that are integrated with Siebel
Communications

Trouble Ticket Referral

Trouble tickets can be referred from Siebel Communications to trading partner software through
integration with an electronic bonding gateway, using Siebel eBusiness Application Integration (eAI).

Additional Information on Service Requests

The remainder of this chapter describes trouble ticket management. For more information about
service requests, see *Siebel Field Service Guide* and *Applications Administration Guide*.

Scenario for Service Requests and Trouble Tickets in Siebel Communications

This scenario shows a sequence of procedures performed by a customer service representative (end
user) and a workflow manager (administrator). Your company may follow a different sequence
according to its business requirements.

A customer service representative (CSR) receives a call from the owner of a software company. He
is phoning from his mobile phone and explains that he has no dial tone on his office phone. The CSR
verifies the customer's service configuration and identifies the specific phone line to which he is
referring.

The CSR creates a trouble ticket and attempts to use the problem resolution capabilities in Siebel
Communications to resolve the customer's problem. The CSR is unable to solve the problem and
passes the trouble ticket to the Network Services Group. The CSR ends the call and creates a follow-
up activity on the trouble ticket.

Two minutes later, the CSR receives a broadcast message indicating that there is a circuit break that
is affecting customers in a particular exchange. The CSR looks up the network-reported problem for
the circuit outage and finds the specific trouble ticket. The trouble ticket details indicate that a
construction crew sliced through a cable that carries network traffic for the exchange. The estimated
repair time is five hours.

The CSR performs a search in Siebel Communications to find all open trouble tickets that have a service item equivalent to the affected exchange. The search produces a list of 15 trouble tickets, including the network-reported trouble ticket.

The CSR associates each of the 14 customer-reported trouble tickets with the one network-reported trouble ticket for the following reasons:

■   The 14 customer-reported problems are related to one network outage.

■   Your company's Siebel administrator has configured the Siebel applications so that all the customer-reported troubles are resolved when the network-reported trouble is resolved.

The CSR assigns the network trouble ticket for the cable break to a technician in the Repair and Maintenance department and receives a message from the on-site maintenance crew that the cable has been repaired and tested and is fully operational. The technician creates a series of notes in the network trouble ticket, indicating the resolution, and closes the trouble ticket.

When the technician closes the parent trouble ticket, the child trouble tickets are *not* automatically closed since it may be necessary to verify that each customer's problem has been fixed. Because your administrator has configured it to do so, Siebel Communications determines that the trouble ticket for the customer described above can be closed. It then sends a text message to the customer's mobile phone notifying him of the resolution.

At the end of the day, the manager examines all of the trouble tickets generated that day.

Figure 15 shows the sequence of procedures that end users might follow to manage trouble tickets.
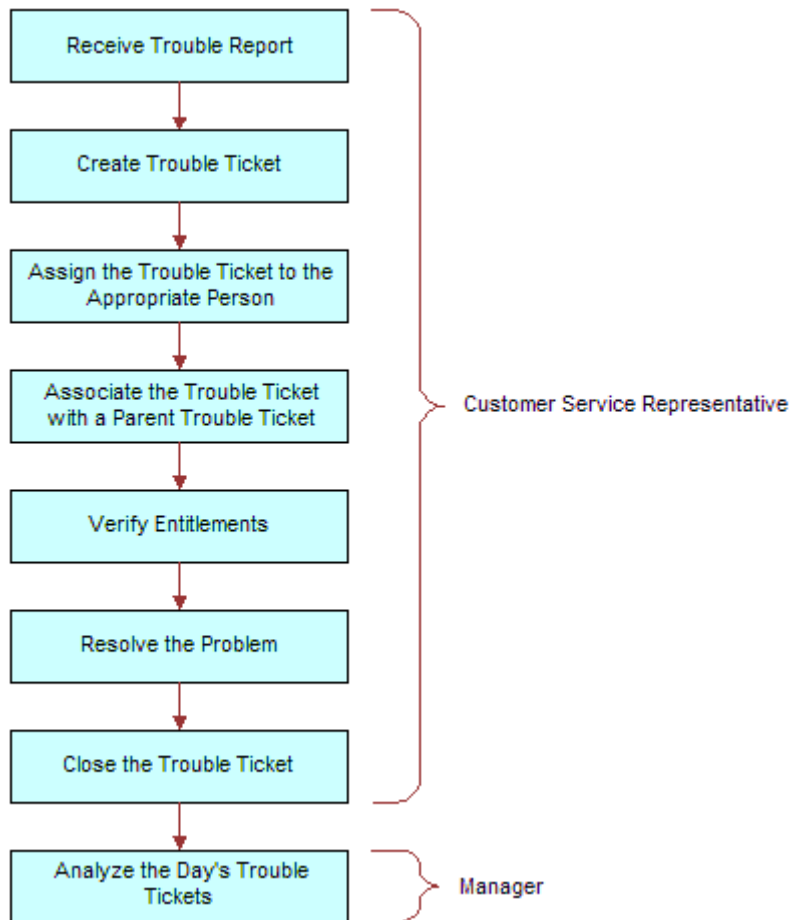
Figure 15. Example of Sequence for Trouble Tickets

Setting up Service Requests and Trouble Tickets in Siebel Communications

Administrators can create scripts and automate the assignment of trouble tickets, making the CSRs' job easier.

■ You can use Siebel SmartScript to provide scripts that guide CSRs as they collect information about trouble tickets. For more information about creating scripts, see *Siebel SmartScript Administration Guide*.

■ CSRs or other qualified personnel can manually assign ownership of a trouble ticket to themselves, to another employee, or to a group. With the appropriate setup, Siebel Assignment Manager can be used to give the CSR the option of automating the assignment.

For more information about setting up Siebel Assignment Manager (including rules, criteria, workload, employees, positions, and territories), see *Siebel Assignment Manager Administration Guide*.

Creating a Trouble Ticket Record in Siebel Communications (End User)

End users can create a trouble ticket record.

To create a trouble ticket

1 Navigate to Trouble Tickets > Trouble Ticket list.

2 Add a new record to the Trouble Ticket list, and complete the necessary fields in the record and the More Info form. To access more fields, click the show more button in the upper-right corner of the form.

Some fields are described in the following table.

Field	Comments
Last Name	The last name of the person reporting the problem.
Owner	Person responsible for resolving the trouble ticket (may be the end user, another service representative, or a service group).
Ref #	A number used by an external system (if any) to identify the trouble ticket.

Assigning a Trouble Ticket in Siebel Communications (End User)

If end users are unable to resolve trouble tickets themselves, they may need to assign them to another qualified CSR or to a group.

In general, trouble tickets can be assigned in these ways:

■ **Batch assignment.** Siebel Assignment Manager can assign many trouble tickets at a scheduled time. For more information, see *Siebel Assignment Manager Administration Guide*.

■ **Dynamic assignment.** Siebel Assignment Manager can automatically assign trouble tickets at preset intervals. For more information, see *Siebel Assignment Manager Administration Guide*.

■ **Interactive assignment.** Siebel Assignment Manager is invoked manually from the menu button in the More Info view, as described in the next procedure.

■ **Manual assignment.** Users select the owner in the Trouble Tickets screen, as described in the next procedure.

To assign a trouble ticket manually to a person or group

1   Navigate to Trouble Tickets > Trouble Ticket list.

2   In the Trouble Ticket list, click the Ticket Id of the trouble ticket.

3   In the More Info form, click the show more button and then do one of the following:

   ■   To assign a trouble ticket using Siebel Assignment Manager, click the menu button, select
       Assign, and then select a person.

   ■   To manually assign a trouble ticket to a person, select a person in the Owner field.

   ■   To manually assign a trouble ticket to a group, select a group in the Group field.

Associating Parent and Child Trouble Tickets in Siebel Communications (End User)

The general procedure for setting up a parent-child relationship is to create the child trouble ticket
and then associate it with an existing trouble ticket that will be the parent.

End users can group many child trouble tickets under one parent trouble ticket. Grouping several
trouble tickets under one parent can be useful for managing a single network problem that results
in calls from many customers.

To associate a child trouble ticket with existing parent trouble tickets

1   Navigate to Trouble Tickets > Trouble Ticket list.

2   In the Trouble Tickets list, select one or more child trouble tickets.

3   Click the Parent Trouble Tickets view tab.

   The Trouble Ticket Details form appears with the Parent Trouble Tickets list beneath it.

4   In the Parent Trouble Tickets list, click New.

5   In the Add Trouble Tickets dialog box, select one or more parent trouble tickets.

NOTE: A list of children of a selected trouble ticket appears in the Related Trouble Tickets view.

To verify the entitlement associated with the trouble ticket

1   Navigate to Trouble Tickets > Trouble Ticket list.

2   In the Trouble Ticket list, click the Ticket Id of the trouble ticket.

3   Click the More Info view tab.

4   In the More Info form, click the show more button to access more fields.

5   In the Entitlement Name field, select an entitlement.

NOTE: For information on determining how this dialog box is populated, see *Siebel Field Service Guide*.

6   In the More Info form, click Verify.

The Due Date field is automatically populated with the appropriate time period. For instance, if the customer is entitled to have a problem fixed within two hours, the Due Date field will reflect this.

About Trouble Ticket Solutions

Customer service organizations estimate that approximately 85 percent of assigned trouble tickets are related to problems that have been previously encountered. Siebel Communications provides easy access to descriptions of how previous trouble tickets were resolved. When there is no existing solution to a trouble ticket, a member of the organization can research the problem and create a new description in the form of a solution record.

Solutions Defined

In Siebel Communications, the term *solution* specifically means a record in the Siebel Communications database that includes a description of how a previous trouble ticket was resolved or how an anticipated future trouble ticket could be resolved. The word solution is also used in general terms to mean an answer to a problem.

Further Information

End users can review and create solutions for trouble tickets using the same methods used to review and create solutions for service requests. For more information about working with solutions, see *Siebel Field Service Guide*.

Resolving Trouble Tickets in Siebel Communications (End User)

This section describes various ways of resolving trouble tickets.

Adding an Activity to a Trouble Ticket

Resolving a trouble ticket may require several procedures, performed by more than one person or group. End users can create an activity for each step and assign the activity to themselves, another qualified person, or a group.

Activity plans consist of a list of activities to be completed to resolve a problem. If an appropriate activity template exists, end users can select the template to populate their activities list with a defined set of activities. Then end users can customize the list, if necessary.

For more information about working with activities and activity plans, see *Applications Administration
Guide*.

To associate an activity plan with a trouble ticket

1 Navigate to Trouble Tickets > Trouble Ticket list.

2 In the Trouble Ticket list, click the Ticket Id of the trouble ticket.

3 Click the Activity Plans view tab.

4 In the Activity Plans list, add a record.

5 In the Template field, select an Activity Template.

To add an activity to a trouble ticket

1 Navigate to Trouble Tickets > Trouble Ticket list.

2 In the Trouble Ticket list, click the Ticket Id of the trouble ticket.

3 Click the Activities view tab.

4 In the Activities list, add a record and complete the necessary fields.

Closing a Trouble Ticket

When a trouble ticket is resolved, end users can change its status to Closed in any Trouble Ticket list
or form. Changes cannot be made to trouble tickets that are closed. To continue working on a closed
trouble ticket, first change its status to Open or Pending.

To close a trouble ticket

1 Navigate to Trouble Tickets > Trouble Ticket list.

2 In the Trouble Ticket list, click the Ticket Id of the trouble ticket.

3 Click the More Info view tab.

4 In the More Info form, from the Status drop-down list, select Closed.

> **NOTE:** When you save or click outside the record, the Sub-Status field changes to Resolved and
> the Date Closed field reflects the current time and date.

Using the Customer Satisfaction Survey in Siebel Communications (End User)

Customer satisfaction surveys allow end users to conduct a survey with the person who initiated a
trouble ticket. If they have Chart Works Server (a third-party application) installed, a chart displays
a measurement of the customer's satisfaction as they record the customer's responses. On a
subsequent occasion, they can conduct another survey without overwriting existing survey records.

As part of closing a trouble ticket, end users can conduct a customer survey in person, or they can use the Correspondence screen to send a letter and survey to the originator of a trouble ticket. When they mail a survey, an activity is automatically generated for the mailing.

For information about using the Correspondence screen to send out customer satisfaction surveys, see *Applications Administration Guide*.

To conduct a customer survey

1 Navigate to Trouble Tickets > Trouble Ticket list.

2 In the Trouble Ticket list, click the Ticket Id of the trouble ticket.

3 Click the Customer Satisfaction Survey view tab.

4 Scroll down to the Survey Details form, and add a record.

5 Ask each of the questions on the Survey form and record the customer's answer for each field.

Analyzing Trouble Tickets Data in Siebel Communications (End User)

You can use charts to perform various types of analyses on your group's trouble tickets.

To analyze trouble tickets data using charts

1 Navigate to Trouble Tickets > Chart.

2 In the Trouble Ticket list, select the trouble ticket.

3 In the Charts form, select appropriate chart settings.

Additional End-User Tasks for Trouble Ticket Management in Siebel Communications

For descriptions of other procedures related to trouble tickets, see the *Siebel Bookshelf*.

Customer Verification

When a customer telephones a call or service center, end users must verify if the person is an existing or new customer. To verify a customer, end users navigate to the Accounts or Contacts screen and perform a query on a form of information about the customer, such as last name, Social Security number, and so on. If the customer exists in the system, end users can review which requests have already been entered for this customer. If the customer does not already exist in the system, end users can add the customer. For more information about accounts and contacts, see Chapter 3, "Accounts in Siebel Communications," and Chapter 5, "Contacts in Siebel Communications."

Entitlement Verification

When creating a trouble ticket, verify the type of service agreement and entitlements connected with
it. For more information about service agreements and entitlements see Chapter 6, "Agreements and
Entitlements in Siebel Communications."

Communication with Field Service Agents

End users may need to contact a field service agent. Siebel Communications allows you to send
messages about trouble tickets in several ways, including sending a text message to a pager. For
more information, see *Siebel Communications Server Administration Guide*.

Trouble Tickets and Attachments

At any time, end users can store additional information relating to a trouble ticket in the database
by associating an electronic file with the trouble ticket record. For directions for associating an
attachment with a record, see *Fundamentals*.

13 Credit Management in Siebel Communications

Credit management functionality frequently resides in third-party back-office credit systems. Siebel eBusiness Application Integration (eAI), which is part of Siebel Communications, provides you with the ability to integrate with these systems and to use their information and functionality.

If customers are late in paying their bills or have not paid their bills in full, their accounts are flagged by the third-party credit system. The rules for detecting late payment or nonpayment are defined in the credit system. Siebel Communications can interpret late payment or nonpayment messages that the credit system generates.

As a basis for credit management, Siebel Communications provides information in the form of credit alerts. A *credit alert* is a Siebel Communications credit record that can be generated by messages from a back-office credit management system when a customer breaches a credit threshold. It can also be generated manually by a customer request or by the initiative of a customer service representative (CSR). Credit alerts can be resolved through a variety of means, such as customer payment of the outstanding amount, adjustments to a customer account to correct an erroneous billing, and an agreement with a customer for a payment arrangement plan.

About Credit Management in Siebel Communications

Siebel Communications Credit Management provides the following capabilities:

- **Credit Alerts.** Generates credit alerts when external credit management systems send information about changes in the credit situation of a customer. Provides the ability to send updated credit alert information back to the external credit management systems.

- **Activities.** Generates activities associated with a credit alert. Also allows you to add activities based on a credit alert.

- **Payments.** Allows you to send customer payments to the credit management system in response to a credit alert.

- **Account Adjustments.** Allows you to send requests to the credit management system for adjustments to a customer account when a credit alert is in error. Displays the credit management system's responses to these requests.

- **Payment Arrangements.** Allows you to send requests to the credit management system for payment arrangement plans in response to a credit alert. Displays the credit management system's responses to these requests.

- **Attachments.** Allows you to attach external documents to a credit alert.

In addition, Siebel Communications provides the following credit management requirements in other modules:

■ **Credit Rating.** Displays the customer's credit rating details, including credit score, source, and date. For more information, see "About Financial Profiles in Siebel Communications" on page 41.

■ **Billing Information.** Displays customer billing information you may need to resolve a credit alert.

CSRs use Credit Management functionality to manage and monitor customer credit issues. They are responsible for reviewing with the customer all account information and credit issues, as well as answering billing inquiries, suggesting payment arrangement plans, and making account adjustments.

Customer service supervisors use Credit Management functionality to determine if a CSR is allowed to request credit adjustments on a customer's account, set up payment arrangement plans, and maintain billing profiles.

Scenario for Credit Management in Siebel Communications

This scenario shows a sequence of procedures performed by a customer service representative (end user). Your company may follow a different sequence according to its business requirements.

A CSR is responsible for handling credit queries for all of your small and medium-sized customers. A business customer has a contract for wireless subscriptions for its employees. The owner usually pays the bill on time. However, the latest bill for the wireless services is overdue by 18 days.

This nonpayment is automatically detected by the company's accounts receivable system and is forwarded to the credit management system, which then forwards a nonpayment message to Siebel Communications. The message causes Siebel Communications to create a credit alert.

Siebel Communications then generates an activity to contact the owner and sets the account status appropriately. The credit alert appears in the customer service supervisor's queue by default, and the supervisor assigns the credit alert to the CSR.

The CSR examines the credit alert and reviews the billing information needed to handle any customer questions. She also checks for all credit alerts raised against the customer's account in the last 12 months to see if there is a history of delinquency. This turns out to be the first credit alert against the customer's account. The CSR then checks the customer's credit rating, which is acceptable.

The CSR looks up contact information for the customer in Siebel Communications and telephones the owner, who is listed as the primary contact for the customer account. The owner apologizes for the delay in payment of the bill and explains that the company has experienced a temporary cash flow problem. The owner asks what options are available. The CSR informs the owner that he can either delay the payment of the bill or request a payment arrangement plan. The owner asks to repay the outstanding bill in three installments.

The CSR enters the required information into Siebel Communications, sets the credit alert's Status to Pending, and records the details of the conversation in the Comments field.

Siebel Communications transmits this information to the credit management system. The credit management system processes the request overnight and responds with an update to the credit alert. The next day, the CSR checks for all open and pending credit alerts assigned to them. The CSR notices that the customer's payment arrangement request has been approved.

The CSR contacts the owner and informs him of the outcome. The CSR then writes a letter confirming
the details of the payment arrangement plan, and attaches the letter to the credit alert. Then the
CSR updates the Action Type of the credit alert to Payment Arrangement Agreed.

Figure 16 shows the sequence a CSR might use to process a customer credit alert.
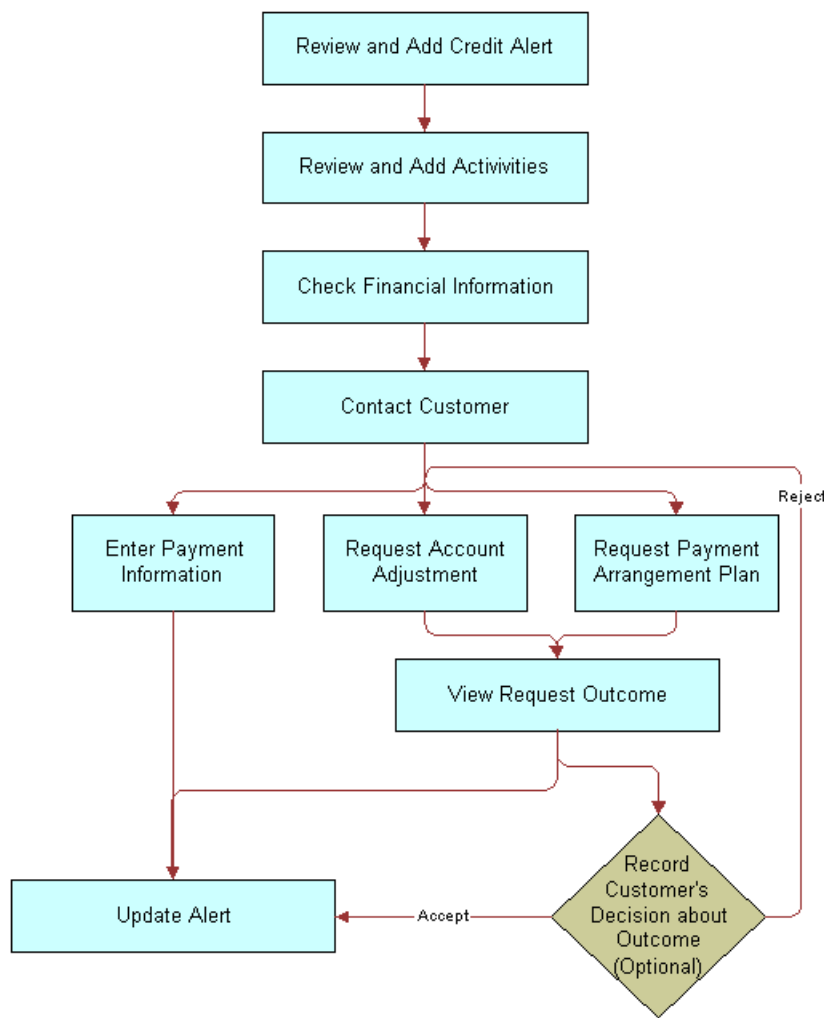
Figure 16. Example of Sequence for Credit Management

Reviewing and Adding a Credit Alert in Siebel Communications (End User)

The All Credit Alerts view displays all credit alerts in the system. The My Credit Alerts view displays
only the credit alerts that are assigned specifically to an end user. These views are identical except
for the ownership. The policies for assignment of credit alerts are determined by their company.

End users can use the All Credit Alerts view or the My Credit Alerts view to see external credit alerts, which originate from your company's external credit management system. They can limit the list by selecting a predefined query. Siebel Communications includes the queries All, Closed, Open and Unassigned Alerts.

End users can also use these views to create internal credit alerts for preemptive measures; these alerts can record situations such as the likelihood of a delayed customer payment. If they have permission to do so, end users can create a credit alert and a corresponding payment arrangement plan record.

On being contacted by a service provider regarding a credit problem, a customer may want you to query the billing account. The customer may, for example, believe that he has been incorrectly billed. End users may, therefore, need to refer to the customer billing data to deal with the customer contact. For more information, see Chapter 10, "Billing in Siebel Communications."

To create an internal credit alert

1 Navigate to the Credit Management screen.

2 In the Credit Alerts list, add a record and complete the necessary fields in the record and the More Info form. To access more fields, click the show more button in the upper right corner of the form.

Some fields are described in the following table.

Field	Comments
Account	Account name associated with the credit alert.
Account #	Account number associated with the credit alert.
Action Type	Type of action to be performed in relation to a credit alert. The Action Type may generate or require one or more activities.
Agreement	Agreement associated with the credit alert.
Alert #	Unique identifier for the credit alert, which may or may not be generated within Siebel Communications. Automatically populated when a new record is added.
Amount Owed	Amount owed by the customer.
Created On	Date and timestamp showing when the credit alert was generated within Siebel Communications.
Invoice #	Invoice number associated with the credit alert.
Owner	Person to whom the credit alert is assigned.
Priority	Priority of the action to be taken in response to the credit alert.
Source	Indicates if the alert was generated externally by a credit management system or internally by a CSR. Automatically populated.
Status	Status of the credit alert.

Adding an Activity to a Credit Alert in Siebel Communications (End User)

End users can associate activities with a credit alert. The Credit Alert Activities view displays all
activities associated with a selected credit alert.

To add an activity to a credit alert

1   Navigate to the Credit Management screen.

2   In the Credit Alerts list, click the Alert # of a credit alert record.

3   Click the Activities view tab.

4   In the Activities list, add a record and complete the necessary fields.

Contacting the Customer About a Credit Alert (End User)

Contact the customer to discuss the reason for the credit alert and the available payment options.
Determine if it is necessary to adjust the customer's account, or help the customer to decide whether
they would like to send payment immediately or request a payment arrangement plan.

Entering Payment Information in Siebel Communications (End User)

The Payment Information view allows end users to submit a record of payment received from a
customer in response to a credit alert. One possible resolution for a credit alert involves the
customer's immediate payment of the amount outstanding. End users can enter multiple instances
of payment information for a single credit alert.

The Credit Alert Detail form displays a selected credit alert. The Payment Information form changes
dynamically depending on the payment method end users select in the Method field.

To create a payment record

1   Navigate to the Credit Management screen.

2   In the Credit Alerts list, click the Alert # of a credit alert record.

3   Click the Payments view tab.

4   Scroll down to the Payment Detail form and add a record.

5   In the Payment Method field, select the type of payment method used by the customer to make
a payment.

When you select a payment method from the Method drop-down list, additional fields appear in
the form.

6 Complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Card # (Credit Card only)	The number on the front of the credit card.
Reference Location (Reference only)	The name of the third-party business (for example, bank or post office name).
Reference # (Reference Only)	The purchase order or receipt number.

For more information about entering payment information, see "Entering Payment Against an
Outstanding Balance in Siebel Communications (End User)" on page 94.

Process of Creating Account Adjustments or Payment Plans in Siebel Communications (End User)

A customer may have been incorrectly billed for a service and therefore may not have made a
payment. In that case, end users need to make an adjustment to the customer's billing account.
Typically, they associate an account adjustment with a credit alert because it may solve a customer
credit issue. The actual account adjustment is made in a third-party billing or accounts receivable
system. However, Siebel Communications provides the ability to request an adjustment and to
receive information about the outcome.

Another customer might be facing financial difficulties and is unable to meet his obligations to pay
for services. Such a customer might request a payment arrangement plan with installments or a
deferral of payment. In response, your company can approve the request, reject the request, or
propose its own terms. The response may depend on factors such as corporate policy, customer
credit history or credit-worthiness, and length of the customer's association with your company. A
payment arrangement plan is associated with a credit alert because it may resolve a customer credit
issue.

The customer request is sent to the back-office credit management system for approval. The
customer request can be approved in full, rejected entirely, or modified with new terms. The credit
management system then sends the outcome back to Siebel Communications.

NOTE: You can request either an installment plan or a payment deferral. For a deferral request,
specify one installment to be paid at a future date.

To create account adjustments and payment plans, perform the following tasks:

1 "Submitting Requests for Account Adjustments or Payment Plans (End User)" on page 127

2 "Viewing Account Adjustment or Payment Plan Request Outcomes (End User)" on page 128

3 "Recording Customer Decisions About Account Adjustments or Payment Plans (End User)" on
page 129

Submitting Requests for Account Adjustments or Payment Plans (End User)

End users first submit a request for an account adjustment or a payment plan.

This task is a step in "Process of Creating Account Adjustments or Payment Plans in Siebel Communications (End User)" on page 126.

To submit a request for an account adjustment

1 Navigate to the Credit Management screen.

2 In the Credit Alerts list, click the Alert # of a credit alert record.

3 Click the Account Adjustments view tab.

The Account Adjustments list displays the history of adjustment requests.

4 In the Account Adjustments list, add a record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Amount	Amount of the adjustment. Set by default to amount owed on the credit alert.
Date	Date the request for adjustment is made. Set by default to current date and time.
Reason	Reason the adjustment request is being made.
Status	Status of the request. Set by default to Open.
Type	Type of adjustment request.

NOTE: It is possible to submit multiple account adjustment requests for a single account. However, this situation is not typical.

To submit a request for a payment arrangement plan

1 Navigate to the Credit Management screen.

2 In the Credit Alerts list, click the Alert # of a credit alert record.

3 Click the Payment Arrangements view tab.

4 In the Payment Arrangements form, select Payment Arrangement Details from the Show drop-down list.

5 In the Payment Arrangement Details form, add a record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Installment Amount	This field is automatically populated when you enter the number of installments. The installment amount equals the original amount due divided by the number of installments.
Number of Installments	Number of installments for payment arrangement. For a single-payment deferral plan, this number is 1.
Original Amount Due	Total amount due.
Original Due Date	Original due date for payment.
Plan End Date	Payment Arrangement plan end date. For a single-payment deferral plan, use the same date for both Start Date and End Date.
Plan Start Date	Payment Arrangement plan start date.
Plan Type	Type of payment arrangement plan.
Status	Status of the request. From the drop-down list, select Pending.

6 Click the back button until you return to the credit alert list.

7 From the Action Type drop-down list, select Payment Arrangement Requested.

To view a history of payment arrangements

1 Navigate to the Credit Management screen.

2 In the Credit Alerts list, click the Alert # of a credit alert record.

3 Click the Payment Arrangements view tab.

4 In the Payment Arrangements form, select Payment Arrangement from the Show drop-down list.

Viewing Account Adjustment or Payment Plan Request Outcomes (End User)

Typically, the account adjustments and payment arrangement plans are agreed upon in the back office, either manually or through a system. The back-office system then sends the outcome of the customer request to Siebel Communications.

This task is a step in "Process of Creating Account Adjustments or Payment Plans in Siebel Communications (End User)" on page 126.

To view an account adjustment outcome

1 Navigate to the Credit Management screen.

2 In the Credit Alerts list, click the Alert # of a credit alert record.

3 Click the Account Adjustments view tab.

4 In the Account Adjustments list, review the credit management system's response to the
adjustment request, specifically the Status, Amount Approved, and Approval Description fields.

> **NOTE:** Each adjustment request is accompanied by a single adjustment outcome.

To view a payment arrangement plan outcome

1 Navigate to the Credit Management screen.

2 In the Credit Alerts list, click the Alert # of a credit alert record.

3 Click the Payment Arrangements view tab.

4 Scroll down to the Payment Arrangements Outcome form to view the credit management
system's response to the adjustment request.

Some of the fields are described in the following table.

Field	Comments
Installment Amount	Payment amount per installment. This can be either a single payment or multiple installments.
Interest Charge	Interest owed on the payment arrangement plan. This is calculated by the back-office system.
Number of Installments	Number of installments. This can be either a single payment or multiple installments.
Plan Type	Type of payment arrangement plan.
Status	Outcome of the payment arrangement plan request.
Total Amount Due	Total owed for bill and accrued interest.

Recording Customer Decisions About Account Adjustments or Payment Plans (End User)

End users can record the customer's decision about the outcome.

This task is a step in "Process of Creating Account Adjustments or Payment Plans in Siebel
Communications (End User)" on page 126.

To record the customer's decision about an account adjustment outcome

1 Navigate to the Credit Management screen.

2 In the Credit Alerts list, click the Alert # of a credit alert record.

3 Click the Account Adjustments view tab.

4 In the Account Adjustments list, enter information in the Customer Decision and Customer Decision Date fields.

NOTE: If your company's policy does not require a customer decision regarding an account adjustment outcome, the customer decision fields may not appear in Siebel Communications.

5 If the customer rejects the outcome, discuss the options again and submit another request.

To record the customer's decision about a payment arrangement outcome

1 Navigate to the Credit Management screen.

2 In the Credit Alerts list, click the Alert # of a credit alert record.

3 Click the Payment Arrangements view tab.

4 Scroll down to the Payment Arrangements Outcome form and enter information in the Customer Decision and Customer Decision Date fields.

NOTE: If your company's policy does not require a customer decision regarding an account adjustment outcome, the customer decision fields may not appear in Siebel Communications.

5 If the customer rejects the outcome, discuss the options again and submit another request.

Closing a Credit Alert in Siebel Communications (End User)

After an outcome has been received and accepted (if necessary), close the credit alert.

To close a credit alert

1 Navigate to the Credit Management screen.

2 In the Credit Alerts list, click the Alert # of a credit alert record.

3 In the Action Type field, select Payment Arrangement Agreed.

4 In the Status field, select Closed.

Additional End-User Tasks for Credit Management in Siebel Communications

For descriptions of other, more general procedures related to credit management, see *Siebel Field Service Guide* and *Applications Administration Guide*.

Financial Information Checks

Look at customer financial information, including bills and credit rating data, that may be useful in
resolving credit alerts. For information about checking customer financial information, see "About
Financial Profiles in Siebel Communications" on page 41.

14 Fraud Management in Siebel Communications

Fraud occurs when someone uses a service to defraud a consumer, business, or service provider by obtaining free services or services that the individual concerned is not entitled to. Some of the more common methods and indicators of fraud include:

- Cloning of wireless handsets

- Stolen handsets

- Unauthorized third-party charging of calls

- Stolen or fraudulently obtained calling cards and PINs

- Bills returned in the mail with a claim that the customer is not at that address

Fraud can be identified in various ways. For example, a consumer may identify fraud on a bill, noting charges for services that were not requested or used. Alternatively, a service provider may identify irregular calling patterns that may indicate fraud.

Traditionally, companies have used legacy fraud management systems to identify and manage fraud.

About Fraud Management in Siebel Communications

The fraud management process involves *fraud alerts*, warnings that a fraud may have been committed, which are generated by the fraud management system from an analysis of calling details. For example, an alert may be generated if the system detects calls originating from two different cities within a short time period. A common way to commit such a fraud is by cloning, illegally modifying a handset chip to send an identification signal for another, legal phone. This allows the owner of the illegal handset to make phone calls on the legal phone owner's account.

A fraud alert can also be generated by a breach of a fraud threshold. A *fraud threshold* is a value which, when exceeded, produces a fraud alert. For example, a customer may have a threshold limit of $250.00 per day for domestic calls.

The back-office system issues a fraud alert by placing the customer on a *fraud list*, a list of customer accounts that are suspected of or confirmed for fraud. The back-office system may generate multiple lists, classified by categories in descending order of the likelihood of fraud.

A back-office fraud management system usually has a front-office component, which is used to manage customer interactions related to fraud. Siebel Communications functions as the front-office application for managing fraud. Your company's back-office fraud management systems send fraud lists to Siebel Communications for follow-up. Customer service representatives (CSRs) go through the lists and contact the customers to check if they made the calls that are the cause of the fraud alerts.

Fraud alerts indicate what type of fraud may have occurred. For example, Exceeds Threshold is a fraud alert type that indicates that a predefined limit has been exceeded. Another fraud alert type, Stolen Handset, indicates that a customer's wireless handset has been stolen.

To help you resolve cases of suspected or obvious fraud, Siebel Communications allows you to view fraud lists, fraud alerts, fraud-related background information about accounts, and the history of fraud-related activities for an account.

Scenario for Fraud Management in Siebel Communications (End User)

This scenario shows a sequence of procedures performed by a customer service representative (end user). Your company may follow a different sequence according to its business requirements.

A CSR is responsible for handling fraud issues for all of your small and medium-sized customers. A business customer has a contract for wireless subscriptions for the firm's employees. The owner is one of the wireless subscribers and is based in Rome.

The CSRs fraud management system notices that calls from the owner's wireless phone have originated in San Francisco and Los Angeles within a span of a few minutes. This can only happen when a wireless handset has been cloned. The fraud management system generates a fraud alert for the customer's account, with the fraud level set to Certain, the fraud type set to Invalid Calls, and fraud event set to Simultaneous Calls. The fraud management system also suspends the customer's account pending customer confirmation. The fraud message and the associated call detail records (CDRs) are forwarded to Siebel Communications. The fraud system creates the alert and flags the account. Through integration with the third-party system, the fraud data is sent to the CSR's Siebel application, and the account is flagged as fraudulent. The Siebel application creates a fraud alert and fraud alert details and updates the customer account with the fraud level.

Siebel Communications has been configured to generate an activity to contact the customer. The fraud alert appears in the customer service supervisor's queue by default, and the supervisor assigns the fraud alert to the CSR, who then examines the fraud alert and associated fraud alert details. The CSR also checks for any other fraud alerts raised against the customer's account in the last 12 months to see if there is a history of fraud. This turns out to be the first fraud alert against this customer's account.

The CSR looks up contact information for the customer in Siebel Communications and telephones the owner, who is listed as the primary contact for the customer account. The owner mentions that he has not been to Los Angeles for more than two years, and is certain that the phone has been in his control during this period. The CSR informs him that there may have been a fraudulent use of his telephone number, and that the CSR will need to provide him with another telephone number. The customer agrees to take his handset to the nearest dealer who will help him with this process. The CSR updates the fraud alert's status and attaches appropriate comments.

Siebel Communications transmits this information to the fraud management system. The CSR's fraud management department then starts its formal investigation.

Figure 17 shows a possible sequence for managing fraud.
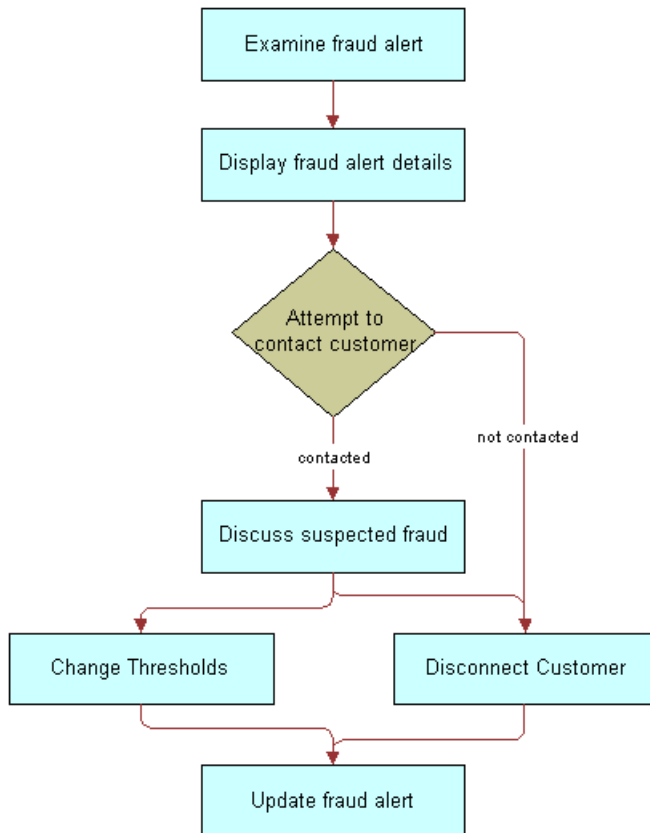
Figure 17. Example of Sequence for Fraud Management

Viewing Fraud Alerts in Siebel Communications (End User)

When a back-office application flags an account for fraud, Siebel Communications receives a fraud alert and fraud alert details.

In the course of investigating fraud, end users review the fraud alert to determine the type of fraud that may have occurred. End users then discuss the fraud alert details, which contain the specific data alleged to be fraudulent, with the customer.

To view a fraud alert

1 Navigate to the Fraud Management screen.

2 In the Fraud Alerts list, click the Alert # field of a fraud alert.

Some fields in the list are described in the following table.

Field	Comments
Alert #	Unique identifier code assigned by the system to each fraud alert.
Fraud Event	Condition that indicates suspected fraud. The value in this field depends on the value in the Fraud Type field.
Owner	Primary person assigned to this account for fraud management purposes. This person is responsible for customer follow-up to determine if fraud has taken place.
Threshold Overflow	Quantity by which the account's threshold level was exceeded.

To view fraud alert details

1 Navigate to the Fraud Management screen.

2 In the Fraud Alerts list, click the Alert # field of a fraud alert.

3 Click the Event Details view tab.

An Account form appears with the Event Details list beneath it. The Event Details list displays detailed information about the selected alert. This typically consists of the call detail records associated with the suspected fraudulent calls.

It is possible for certain fraud alerts (for example, Stolen Handset) to have no associated fraud alert details.

Some fields in the Event Details list are described in the following table.

Field	Comments
Charge	Cost of or charges for the service from the Charge dialog box.
Date/Time	Date and time of the event.
Length	Length of the service in seconds.
Number Called	Number dialed in a suspected fraudulent call.
Number Location	Geographical location of the number dialed in a suspected fraudulent call.
Rate	The name of the rate plan used to calculate the charge—for example, Peak, Off-Peak, Standard, Economy, or International.

Following Up with the Customer about a Fraud Alert (End User)

End users should establish contact with the customer. Your company may have a business rule that determines how many times end users should attempt to contact the customer.

If repeated attempts to contact the customer fail, end users may need to disconnect the customer's service. Your company can configure Siebel Communications to send a message to this effect to the back-office system. Workflow Manager or a VB script might be used for this configuration.

Changing Fraud Thresholds in Siebel Communications (End User)

End users can change thresholds in the fraud profile, if necessary. For example, if a breach of a credit threshold generated the fraud alert, the customer can request a higher threshold. If this is granted, it may cancel the fraud alert.

To change a fraud threshold

1 Navigate to the Fraud Management screen.

2 In a record of the Fraud Alerts list, click the Account Name hyperlink.

3 In the Fraud Account Profile form, change one or more of the fields.

For information about the fields in the Fraud Account Profile form, see Chapter 4, "Profiles in Siebel Communications."

Updating the Fraud Alert in Siebel Communications (End User)

End users can indicate that some action has been taken by adding comments or by changing other fields in the fraud alert record, such as its status, priority, or owner.

To update a fraud alert

1 Navigate to the Fraud Management screen.

2 In the Fraud Alerts list, select a fraud alert.

3 In the Fraud Alert record and More Info form, complete the necessary fields.

Additional End-User Tasks for Fraud Management in Siebel Communications

For descriptions of other procedures related to fraud management, see the *Siebel Bookshelf*.

Disconnecting Service

End users can disconnect a customer's service, if necessary, based on the nature of the alert, a discussion with the customer, failure to contact the customer, or your company's policy. Depending on the severity of the alert, part or all of the customer's services (for example, international dialing) may already have been disconnected by the back-office system.

If your company has configured the Fraud Activities types to include Service Disconnect, end users can add this activity to a fraud alert. Otherwise, for information about disconnecting a service, see *Siebel Order Management Guide Addendum for Industry Applications*.

15 Defining Integration Workflows for Siebel Communications

A *workflow process* is a sequence of steps that automates a business function. Some workflow processes (also known as business processes) allow your company to integrate Siebel Communications with back-office systems, including databases. You can implement integration with third-party systems by using the following resources and techniques:

■ **Prebuilt workflows.** Some prebuilt workflow processes are included in the sample database distributed with Siebel Communications, along with prebuilt integration objects in the Siebel Tools repository. If a workflow process mentioned in this chapter is not in your Siebel application's sample database, it may be available on request. To request a workflow process, please contact Siebel Professional Services.

■ **Manual integration.** Your company can automate the integration between Siebel Communications and other applications manually. To automate the integration between Siebel Communications and other applications manually, you normally use both Siebel Business Process Designer and Siebel eBusiness Application Integration (eAI).

■ **UAN integration.** Siebel Systems' Universal Application Network (UAN) is a separate product that defines a library of business processes to integrate external applications with Siebel applications. This library consists of business process flows, common objects, and transformation maps that run on third-party integration servers. Your company can use the design tools provided by the integration server vendors to model and configure the business processes, common objects, and transformation maps as needed. After they have been designed, these processes are imported into the integration server for deployment. For more information about UAN, or to purchase UAN, please contact Siebel Sales.

This chapter explains integration using prebuilt sample workflows that may be provided with your Siebel application or that may be available on request. This chapter contains the following sections:

■ Business scenarios that illustrate how sample integration workflow processes can be used to automate or partially automate a business process.

■ Descriptions of sample integration workflow processes that are available in the Siebel Communications sample database.

■ Details of two sample workflow processes to help you understand how a workflow process is set up. Refer to these samples when you design your own integration workflow processes.

This chapter does not give detailed information about Business Process Administration or application integration in general. For information about these topics, see *Siebel Business Process Designer Administration Guide* and the Siebel eAI guides, available on the *Siebel Bookshelf*.

NOTE: The integration workflow processes discussed in this chapter are not Application Services Interfaces (ASIs), although they serve a similar function.

Terminology for Integration Workflows in Siebel Communications

This section describes some terms used in this chapter in the context of workflow processes.

Siebel eAI. Siebel eBusiness Application Integration is a set of tools, technologies, and prebuilt functional integrations that facilitate application integration. It supports message-based integration with external applications. Using the eAI module, a service provider can connect Siebel Communications directly to another application within the operational support system architecture or connect to a hub or queue. This process allows middleware vendors to build their own Siebel-to-third-party connectors.

NOTE: Integration with specific back-office systems or middleware packages is performed by your company. Siebel eBusiness Applications offers prebuilt connectors to some back-office applications.

Integration Objects. Integration objects define the content of the messages that are initiated or received by Siebel Communications. They are based on business objects. The repository stores both integration objects and the mapping between business objects and integration objects.

Business Services. Business services act upon objects to move data, convert data formats, and perform calculations. The Siebel Communications repository contains some business services that specifically help with integration tasks. You can also build your own in Siebel Tools (at design time) or in the Siebel Web client (at run time).

Workflow Processes. Workflow processes are sequences of steps that are used by Business Process Administration to automate a business function. Workflow process steps call business services that perform the procedures needed to perform a business process.

Scenarios for Defining Integration Workflow in Siebel Communications

The following business scenarios illustrate how you can automate business processes using workflow processes in combination with Business Process Administration.

NOTE: Triggers for some business processes (for example, a button-push or workflow policy) are defined during implementation of the workflow process.

Responding to an External Request for Account Data

An external system requires account data from Siebel Communications. The external application calls the CUT Send Account Data workflow process using the available Siebel object interfaces. The CUT Send Account Data workflow process triggers the CUT Get Account Data subprocess. It retrieves the data from Siebel Communications using the workflow process as an API.

The workflow process used to perform this scenario is CUT Send Account Data along with the subprocess CUT Send Account Data.

Sending Account Data to an External System

An end user creates or modifies a customer account record in Siebel Communications, and this information is communicated to a back-office system.

The workflow process used to perform this scenario is CUT Send Account Data.

Receiving Account Data from an External System

The customer account data has been modified in a back-office system and must be updated in Siebel Communications.

The workflow process used to perform this scenario is CUT Receive Account Data.

Responding to an External Request for Service Profile Data

An external system requires service profile data from Siebel Communications. The external application calls the CUT Send Service Profile workflow process directly, using the available Siebel object interfaces. The CUT Send Service Profile workflow process triggers the CUT Get Service Profile subprocess. It retrieves the data from Siebel Communications using the workflow process as an API.

NOTE: A service profile contains the same information found on the Installed Assets view of the Accounts screen.

The workflow process used to perform this scenario is CUT Send Service Profile Data along with the subprocess CUT Get Service Profile Data.

Synchronizing Service Profile Data with an External System

End users create or modify a service profile in Siebel Communications, and the profile data must be synchronized with one or more back-office systems.

The workflow process used to perform this scenario is CUT Send Service Profile Data.

Synchronizing External Service Profile Data

End users create or modify a service profile in an external application, and the profile data is synchronized with Siebel Communications.

The workflow process used to perform this scenario is CUT Receive Service Profile Data.

Responding to an External Request for Sales Order Data

An external system requires sales order data from Siebel Communications. The external application calls the CUT Get Sales Order Data workflow process directly, using the available Siebel object interfaces. It retrieves the data from Siebel Communications directly, using the workflow process as an API.

The workflow process used to perform this scenario is CUT Get Sales Order Data.

Sending Sales Order Data to an External System

End users create a sales order in Siebel Communications, and the order data is sent to one or more back-office systems.

The workflow process used to perform this scenario is CUT Send Sales Order Data.

Receiving Sales Order Data from an External System

The sales order has been acted upon by one of the back-office systems and must be updated in Siebel Communications.

The workflow process used to perform this scenario is CUT Receive Sales Order Data.

Responding to an External Request for Work Order Data

The external system requires work order data. The external application calls the CUT Get Work Order Data workflow process using the available Siebel object interfaces. It retrieves the data from Siebel Communications directly, using the workflow process as an API.

The workflow process used to perform this scenario is CUT Get Work Order Data.

Sending Work Order Data to an External System

End users create a work order in Siebel Communications, and the order data is sent to one or more back-office systems.

The workflow process used to perform this scenario is CUT Send Work Order Data.

Receiving Work Order Data from an External System

The work order has been acted upon by one of the back-office systems and must be updated in Siebel Communications.

The workflow process used to perform this scenario is CUT Receive Work Order Data.

Responding to an External Request for Trouble Ticket Data

The external system requires trouble ticket data. The external application calls the CUT Get Trouble Ticket Data workflow process using the available Siebel object interfaces. The external application retrieves the data from Siebel Communications directly, using the workflow process as an API.

The workflow process used to perform this scenario is CUT Get Trouble Ticket Data.

Sending Trouble Ticket Data to an External System

A trouble ticket is created by a customer through a Siebel Communications customer application or through a phone call to a CSR. After it is entered, trouble ticket data is sent to a back-office system using the CUT Send Trouble Ticket Data workflow process.

NOTE: Customers have different requirements, and only certain types of trouble tickets must be sent to back-office systems. Some trouble tickets can be managed entirely within Siebel Communications. The supporting integration process is designed for trouble tickets that are sent to the back office. During implementation of a workflow process, the trigger must be implemented in such a way that the workflow process is only invoked for trouble tickets that are sent to the back office.

The workflow process used to perform this scenario is CUT Send Trouble Ticket Data.

Receiving Trouble Ticket Data from an External System

A trouble ticket is created in a back-office system. The trouble ticket record is sent by the back-office system to Siebel Communications using the CUT Receive Trouble Ticket workflow process, allowing call center representatives to access externally generated trouble tickets. Updates to trouble tickets stored in a back-office system can also be sent to Siebel Communications by this mechanism.

The workflow process used to perform this scenario is CUT Receive Trouble Ticket Data.

Receiving Fraud Alert Data

A fraud alert record is created in a back-office system and sent to Siebel Communications using the CUT Receive Fraud Alert Data workflow process. Updates to fraud alert information stored in the back-office system are communicated to Siebel Communications in the same way, allowing CSRs to see the latest information about externally generated alerts.

The workflow process used to perform this scenario is CUT Receive Fraud Alert Data.

Receiving Credit Alert Data

A credit alert record is created in a back-office system and sent to Siebel Communications using the CUT Receive Credit Alert Data workflow process. Updates to credit alert information stored in the back-office system are communicated to Siebel Communications in the same way, allowing CSRs to see the latest information about externally generated alerts.

The workflow process used to perform this scenario is CUT Receive Credit Alert Data.

Synchronizing Phone Number Data with an External System

End users create or modify a phone number in Siebel Communications, and the phone number is synchronized with one or more back-office systems using the CUT Send Phone Number Data workflow process.

NOTE: This process describes the exchange of phone number data. It is assumed that the phone number data are stored as Assets in the Siebel database. This process can be applied to any Asset data.

The workflow process used to perform this scenario is CUT Send Phone Number Data.

Synchronizing External Phone Number Data with Siebel Communications

End users create or modify a phone number in an external application, and the phone number data is synchronized with Siebel Communications using the CUT Receive Phone Number Data workflow process.

The workflow process used to perform this scenario is CUT Receive Phone Number Data.

NOTE: This process describes the exchange of phone number data. It is assumed that the phone number data are stored as Assets in the Siebel database. This process can be applied to any Asset data.

Responding to an External Inquiry for Phone Number Data

The external system requires phone number (asset) data. The external application calls the CUT Get Phone Number Data workflow process using the available Siebel object interfaces. The external application retrieves the data from Siebel Communications using the workflow process as an API.

The workflow process used to perform this scenario is CUT Get Phone Number Data.

NOTE: This process describes the exchange of phone number data. It is assumed that the phone number data are stored as Assets in the Siebel database. This process can be applied to any Asset data.

Sample Integration Workflows for Siebel Communications

This section lists the sample integration workflow processes and indicates which business services, integration objects, and methods are used for each step.

NOTE: Sample workflows must be imported into your database. For instructions on importing these workflows, see *Siebel Business Process Designer Administration Guide*.

Some workflow process steps call other workflow processes. For example, Step 1 of the CUT Send Account Data workflow process calls the CUT Get Account Data workflow process. In this example, the CUT Get Account Data workflow process is a subprocess of the CUT Send Account Data workflow process (see Table 14 on page 145).

Some sample workflow processes communicate using the Siebel EAI MQ Series Transport. If your company does not use MQ Series, you can replace the appropriate step with one that uses either a custom transport business service, the provided HTTP business service, or the provided XML file business service. Business services are located in the Siebel Tools repository and are available for use when defining workflow processes.

The integration objects used in the samples are:

■ CUT Sample Account IO

■ CUT Sample Asset IO

■ CUT Sample Credit Alert IO

■ CUT Sample Fraud Alert IO

■ CUT Sample Sales Order IO

■ CUT Sample Service Profile IO

■ CUT Sample Trouble Ticket IO

■ CUT Sample Work Order IO

NOTE: The Integration Object mentioned in this section is specified in XML. It is not specified as a Business Service Input Argument.

CUT Send Account Data

Table 14 shows the steps for the CUT Send Account Data workflow process.

Table 14. CUT Send Account Data Workflow Process Steps

Step Element	Step 1	Step 2
Step Name	Get Account Data	Send Account Data
Subprocess Name	CUT Get Account Data	
Business Service		EAI MQSeries Server Transport
Integration Object		
Method		Send

CUT Get Account Data

Table 15 shows the steps for the CUT Get Account Data workflow subprocess.

Table 15. CUT Get Account Data Workflow Process Steps

Step Element	Step 1	Step 2
Step Name	Get Account Data	Convert to XML
Subprocess Name		
Business Service	EAI Siebel Adapter	EAI XML Converter
Integration Object	CUT Sample Account IO	
Method	Query	Integration Object Hierarchy to XML Document

CUT Receive Account Data

Table 16 shows the steps for the CUT Receive Account Data workflow process.

Table 16. CUT Receive Account Data Workflow Process Steps

Step Element	Step 1	Step 2	Step 3
Step Name	Receive Account Update	Convert to Internal	Update Account
Subprocess Name			
Business Service	EAI MQSeries Server Transport	EAI XML Converter	EAI Siebel Adapter
Integration Object			
Method	Receive	XML Document to Integration Object Hierarchy	Insert or Update

CUT Send Service Profile Data

Table 17 shows the steps for the CUT Send Service Profile Data workflow process.

Table 17. CUT Send Service Profile Data Workflow Process Steps

Step Element	Step 1	Step 2
Step Name	Get Service Profile Data	Send Service Profile Data
Subprocess Name	CUT Get Service Profile Data	
Business Service		EAI MQSeries Server Transport
Integration Object		
Method		Send

CUT Get Service Profile Data

Table 18 shows the steps for the CUT Get Service Profile Data workflow subprocess.

Table 18. CUT Get Service Profile Data Workflow Process Steps

Step Element	Step 1	Step 2
Step Name	Get Service Profile Data	Convert to XML
Subprocess Name		
Business Service	EAI Siebel Adapter	EAI XML Converter

Table 18. CUT Get Service Profile Data Workflow Process Steps

Step Element	Step 1	Step 2
Integration Object	CUT Sample Service Profile IO	
Method	Query	Integration Object Hierarchy to XML Document

CUT Receive Service Profile Data

Table 19 shows the steps for the CUT Receive Service Profile Data workflow process.

Table 19. CUT Receive Service Profile Data Workflow Process Steps

Step Element	Step 1	Step 2	Step 3
Step Name	Receive Service Profile Update	Convert to Internal	Update Service Profile
Subprocess Name			
Business Service	EAI MQSeries Server Transport	EAI XML Converter	EAI Siebel Adapter
Integration Object			
Method	Receive	XML Document to Integration Object Hierarchy	Insert or Update

CUT Get Sales Order Data

Table 20 shows the steps for the CUT Get Sales Order Data workflow process.

Table 20. CUT Get Sales Order Data Workflow Process Steps

Step Element	Step 1	Step 2
Step Name	Get Sales Order Data	Convert to XML
Subprocess Name		
Business Service	EAI Siebel Adapter	EAI XML Converter
Integration Object	CUT Sample Sales Order IO	
Method	Query	Integration Object Hierarchy to XML Document

CUT Send Sales Order Data

Table 21 shows the steps for the CUT Send Sales Order Data workflow process.

Table 21. CUT Send Sales Order Data Workflow Process Steps

Step Element	Step 1	Step 2
Step Name	Get Sales Order Data	Send Sales Order Data
Subprocess Name	CUT Get Sales Order Data	
Business Service		EAI MQSeries Server Transport
Integration Object		
Method		Send

CUT Receive Sales Order Data

Table 22 shows the steps for the CUT Receive Sales Order Data workflow process.

Table 22. CUT Receive Sales Order Data Workflow Process Steps

Step Element	Step 1	Step 2	Step 3
Step Name	Receive Sales Order Update	Convert to Internal	Update Sales Order
Subprocess Name			
Business Service	EAI MQSeries Server Transport	EAI XML Converter	EAI Siebel Adapter
Integration Object			
Method	Receive	XML Document to Integration Object Hierarchy	Insert or Update

CUT Get Work Order Data

Table 23 shows the steps for the CUT Get Work Order Data workflow process.

Table 23. CUT Get Work Order Data Workflow Process Steps

Step Element	Step 1	Step 2
Step Name	Get Work Order Data	Convert to XML
Subprocess Name		
Business Service	EAI Siebel Adapter	EAI XML Converter

Table 23. CUT Get Work Order Data Workflow Process Steps

Step Element	Step 1	Step 2
Integration Object	CUT Sample Work Order IO	
Method	Query	Integration Object Hierarchy to XML Document

CUT Send Work Order Data

Table 24 shows the steps for the CUT Send Work Order Data workflow process.

Table 24. CUT Send Work Order Data Workflow Process Steps

Step Element	Step 1	Step 2
Step Name	Get Work Order Data	Send Work Order Data
Subprocess Name	CUT Get Work Order Data	
Business Service		EAI MQSeries Server Transport
Integration Object		
Method		Send

CUT Receive Work Order Data

Table 25 shows the steps for the CUT Receive Work Order Data workflow process.

Table 25. CUT Receive Work Order Data Workflow Process Steps

Step Element	Step 1	Step 2	Step 3
Step Name	Receive Work Order Update	Convert to Internal	Update Work Order
Subprocess Name			
Business Service	EAI MQSeries Server Transport	EAI XML Converter	EAI Siebel Adapter
Integration Object			
Method	Receive	XML Document to Integration Object Hierarchy	Insert or Update

CUT Get Trouble Ticket Data

Table 26 shows the steps for the CUT Get Trouble Ticket Data workflow process.

Table 26. CUT Get Trouble Ticket Data Workflow Process Steps

Step Element	Step 1	Step 2
Step Name	Get Trouble Ticket Data	Convert to XML
Subprocess Name		
Business Service	EAI Siebel Adapter	EAI XML Converter
Integration Object	CUT Sample Trouble Ticket IO	
Method	Query	Integration Object Hierarchy to XML Document

CUT Send Trouble Ticket Data

Table 27 shows the steps for the CUT Send Trouble Ticket Data workflow process.

Table 27. CUT Send Trouble Ticket Data Workflow Process Steps

Step Element	Step 1	Step 2
Step Name	Get Trouble Ticket Data	Send Trouble Ticket Data
Subprocess Name	CUT Get Trouble Ticket Data	
Business Service		EAI MQSeries Server Transport
Integration Object		
Method		Send

CUT Receive Trouble Ticket Data

Table 28 shows the steps for the CUT Receive Trouble Ticket Data workflow process.

Table 28. CUT Receive Trouble Ticket Data Workflow Process Steps

Step Element	Step 1	Step 2	Step 3
Step Name	Receive Trouble Ticket Update	Convert to Internal	Update Trouble Ticket
Subprocess Name			
Business Service	EAI MQSeries Server Transport	EAI XML Converter	EAI Siebel Adapter

Table 28. CUT Receive Trouble Ticket Data Workflow Process Steps

Step Element	Step 1	Step 2	Step 3
Integration Object			
Method	Receive	XML Document to Integration Object Hierarchy	Insert or Update

CUT Receive Fraud Alert Data

Table 29 shows the steps for the CUT Receive Fraud Alert Data workflow process.

Table 29. CUT Receive Fraud Alert Data Workflow Process Steps

Step Element	Step 1	Step 2	Step 3
Step Name	Receive Fraud Alert Update	Convert to Internal	Update Fraud Alert
Subprocess Name			
Business Service	EAI MQSeries Server Transport	EAI XML Converter	EAI Siebel Adapter
Integration Object			
Method	Receive	XML Document to Integration Object Hierarchy	Insert or Update

CUT Receive Credit Alert Data

Table 30 shows the steps for the CUT Receive Credit Alert Data workflow process.

Table 30. CUT Receive Credit Alert Data Workflow Process Steps

Step Element	Step 1	Step 2	Step 3
Step Name	Receive Credit Alert Update	Convert to Internal	Update Credit Alert
Subprocess Name			
Business Service	EAI MQSeries Server Transport	EAI XML Converter	EAI Siebel Adapter
Integration Object			
Method	Receive	XML Document to Integration Object Hierarchy	Insert or Update

CUT Get Phone Number Data

Table 31 shows the steps for the CUT Get Phone Number Data workflow process.

Table 31. CUT Get Phone Number Data Workflow Process Steps

Step Element	Step 1	Step 2
Step Name	Get Phone Number Data	Convert to XML
Subprocess Name		
Business Service	EAI Siebel Adapter	EAI XML Converter
Integration Object	CUT Sample Asset IO	
Method	Query	Integration Object Hierarchy to XML Document

CUT Send Phone Number Data

Table 32 shows the steps for the CUT Send Phone Number Data workflow process.

Table 32. CUT Send Phone Number Data Workflow Process Steps

Step Element	Step 1	Step 2
Step Name	Get Phone Number Data	Send Phone Number Data
Subprocess Name	CUT Get Phone Number Data	
Business Service		EAI MQSeries Server Transport
Integration Object		
Method		Send

CUT Receive Phone Number Data

Table 33 shows the steps for the CUT Receive Phone Number Data workflow process.

Table 33. CUT Receive Phone Number Data Workflow Process Steps

Step Element	Step 1	Step 2	Step 3
Step Name	Receive Phone Number Update	Convert to Internal	Update Phone Number
Subprocess Name			
Business Service	EAI MQSeries Server Transport	EAI XML Converter	EAI Siebel Adapter

Table 33. CUT Receive Phone Number Data Workflow Process Steps

Step Element	Step 1	Step 2	Step 3
Integration Object			
Method	Receive	XML Document to Integration Object Hierarchy	Insert or Update

Sample Integration Workflow: CUT Send Account Data

This section examines a send-type sample workflow process to help you understand how the workflow process is set up.

The CUT Send Account Data workflow process sends an XML string, created from an account record, to an IBM MQSeries queue.

This workflow process is shown in Figure 18.
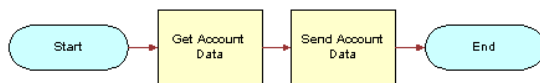
Figure 18. CUT Send Account Data Workflow

CUT Send Account Data Workflow Properties

Properties that apply to all steps of a workflow process are called *workflow process properties*. These properties apply to all workflow processes:

■ Error Message

■ Error Code

■ Object Id

■ Siebel Operation Object Id

The CUT Send Account Data workflow has these additional properties:

■ **Account XML.** Specifies the Siebel object that has been converted to XML.

■ **Input: Siebel Int Object Name.** Specifies the input Integration Object used in send workflows.

■ **Process Instance Id.** Specifies the process instance and is automatically populated when a process is executed and persistence is enabled.

CUT Send Account Data Workflow Steps

CUT Send Account Data Workflow includes the steps described in this section.

Get Account Data Subprocess Step

The first step after Start is the Get Account Data subprocess. This subprocess is shown in contains two steps:

■ Get Account Data

■ Convert to XML

This subprocess is shown in Figure 19.
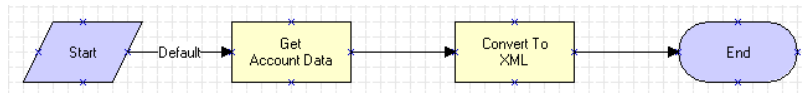
Figure 19. CUT Get Account Data Subprocess Workflow

Get Account Data Step

This step uses the query method of the Siebel EAI Adapter to get an instance of an account record from the Siebel database. The CUT Sample Account IO describes the structure of the Account business object and was created using the Integration Object Builder. The other part of the query criteria is the Object Id, which is a process property that contains the row ID for the account in the sample DB.

NOTE: The CUT Sample Account IO value is actually specified as a process property that is used as the input argument for the process step.

Convert to XML Step

This step uses the Integration Object Hierarchy to XML Document method of the EAI XML Converter to convert the outbound Siebel Message to XML and store it in the Account XML output argument.

Send Step

The last step in the CUT Send Account Data workflow process before End invokes the EAI MQSeries Server Transport to put the XML message onto the MQSeries queue, called Employee. The message is represented by the Message Text argument.

The Queue Manager Name and Physical Queue Name are defined during the MQSeries setup. The Account XML message is sent to the queue specified by the Physical Queue Name property, which is managed by the queue manager specified in the Queue Manager Name property.

Sample Integration Workflow: CUT Receive Account Data

This section examines a receive-type sample workflow process to help you understand how the workflow process is set up.

This sample workflow process, shown in Figure 20, receives an XML string from an IBM MQSeries queue and updates the Account instance in the Siebel database.
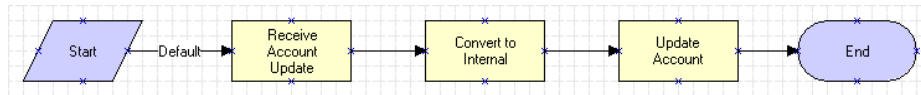
Figure 20. CUT Receive Account Data Workflow Process

CUT Receive Account Data Workflow Properties

You should set workflow process properties when you need a property to be true for the entire workflow. For example, as shown in the following procedure, the CUT Receive Account Data workflow process has five properties. The Error Message, Error Code, Object Id, and Siebel Operation Object Id properties are included in each workflow process by default. The Account XML property defines the MQSeries message as XML recognizable by Siebel eBusiness applications.

The CUT Receive Account Data workflow process has these additional properties:

■ **Account Message.** Contains the object in its Siebel Communications hierarchical format when converted. It must be in this format before it can be inserted or updated in Siebel Communications.

■ **Account XML.** Specifies the Siebel object that has been converted to XML.

■ **Process Instance Id.** Specifies the process instance and is automatically populated when a process is executed and persistence is enabled.

CUT Receive Account Data Workflow Steps

CUT Receive Account Data Workflow includes the steps described in this section.

Receive Account Update Step

The Receive method of the EAI MQSeries Server Transport retrieves the inbound message from the Account physical queue. This queue is named in the Physical Queue Name argument.

In this case, the output from the receive step is put into the Account XML process property. The assumption is that the inbound message is already in XML format.

Convert to Internal Step

The next step, Convert to Internal, uses the XML Document to Integration Object Hierarchy method of the EAI XML Converter to convert the inbound message to the Siebel business object format.

The output argument from this step is stored in the Account Message process property, in the Siebel Message format.

Update Account Step

The last step before End uses the Insert or Update method of the Siebel EAI Adapter to perform the updating task. The Siebel EAI Adapter checks the Siebel database for an Account record that matches the current instance of Account in the Account Message property.

If an Account record matching the current instance does not appear in the database, the Siebel EAI Adapter inserts the record into the database.

If an Account record in the database matches the current instance, the adapter updates the record with the instance.

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