



# **Siebel Energy Guide**

Version 8.0

December 2006

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# 1

## What's New in This Release

### **What's New in Siebel Energy Guide, Version 8.0**

This guide has been updated to reflect product name changes. It was previously published as *Siebel Energy Guide, Version 7.7*.



# 2

## Overview of Siebel Energy

Oracle's Siebel Energy is designed to meet the sales, marketing, call center, and field service requirements of regulated electric, gas, and water local distribution companies (LDCs) as well as unregulated energy service providers (ESPs). Siebel Energy serves residential, commercial, and industrial customers.

Siebel Energy can support large LDCs' call center operations and integrated legacy customer information systems (CIS). It supports an account hierarchy and premises records. It also allows the tracking, sharing, and reporting of usage, billing, and other service details.

Siebel Business Applications are designed to work together to provide an integrated Customer Relationship Management (CRM) solution. Siebel Energy allows energy 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.

This chapter includes the following topics:

- ["Key Features of Siebel Energy" on page 14](#)
- ["Product Modules and Options for Siebel Energy" on page 17](#)
- ["Business Functions of Screens in Siebel Energy" on page 18](#)

## Key Features of Siebel Energy

Table 1 describes how Siebel Energy provides solutions for key business issues.

Table 1. Siebel Energy Solutions for Key Business Issues

Business Issue	Siebel Energy Solutions
Account and Premises management	<ul style="list-style-type: none"> <li>■ Management of accounts through multilevel account hierarchies based on complex account relationships</li> <li>■ Independent management of service accounts and billing accounts</li> <li>■ Tracking of physical facilities and network delivery points through premise records</li> <li>■ Tracking of meters at service points</li> <li>■ Management of account and customer information through profiles</li> </ul>
Agreement management	<ul style="list-style-type: none"> <li>■ Automated production of agreements from accepted quotes</li> <li>■ Coordination of pricing information</li> <li>■ Assigning of standard terms, conditions, and features</li> <li>■ Tracking to make sure that agreements and service entitlements are fulfilled</li> </ul>
Audit trail	<ul style="list-style-type: none"> <li>■ Creation of a history of all the changes that have been made to various kinds of information</li> <li>■ Records show who has accessed an item, what operation has been performed, when it was performed, and how the value was changed</li> <li>■ Useful for maintaining security, examining the history of a particular record, and documenting modifications for future analysis and record-keeping</li> </ul>
Billing management	<ul style="list-style-type: none"> <li>■ Integration with back-office billing systems</li> <li>■ Query and display of billing information</li> <li>■ Management of payment information, payment plans, bill adjustments, and bill profiles</li> </ul>
Call center optimization	<ul style="list-style-type: none"> <li>■ Single desktop to manage multiple types of customer interactions</li> <li>■ Computer telephony integration (CTI) to connect callers with the most qualified agent</li> <li>■ Integrated Web and Interactive Voice Response (IVR) self-service functionality</li> </ul>
Credit management	<ul style="list-style-type: none"> <li>■ Integration with a back-office credit system</li> <li>■ Management of credit alerts</li> <li>■ Notification of customers who are delinquent in payments</li> </ul>

Table 1. Siebel Energy Solutions for Key Business Issues

Business Issue	Siebel Energy Solutions
Customer acquisition	<ul style="list-style-type: none"> <li>■ Analytical tools for segmenting prospects and developing targeted campaigns</li> <li>■ Campaign management tools for developing and executing multichannel campaigns</li> <li>■ Prebuilt performance analysis tools</li> <li>■ Call scripting (providing text that uses proactive selling and retention techniques for employees to use when speaking with customers)</li> <li>■ Territory assignment, lead scoring, and routing</li> </ul>
Customer and partner applications	<ul style="list-style-type: none"> <li>■ Siebel Partner Relationship Management, which allows your company to turn channel partners into an extended, virtual sales and service organization through the Internet</li> <li>■ 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</li> <li>■ Siebel eSales, which allows your customers to use the Internet to browse through your company's products and services, and to configure and purchase them</li> </ul>
Customer retention	<ul style="list-style-type: none"> <li>■ Customer profile that is shared throughout the enterprise</li> <li>■ Profile analysis to predict customer churn</li> <li>■ Generation of win-back actions</li> <li>■ Sales tools that increase sales effectiveness and maximize time spent building relationships</li> <li>■ Tools for marketing analysis, campaign development, and execution</li> </ul>
Equipment and infrastructure	<ul style="list-style-type: none"> <li>■ Management of physical assets available at a customer site</li> <li>■ Tracking of equipment sales to accounts</li> <li>■ Management of meters and assets</li> </ul>
Fraud management	<ul style="list-style-type: none"> <li>■ Integration with a back-office fraud management system</li> <li>■ Management of fraud alerts</li> <li>■ Definition of relevant thresholds for customer fraud profiles</li> <li>■ Classification of customer accounts to indicate the likelihood of fraud</li> <li>■ Management of customer accounts that are either late in settlement or delinquent</li> </ul>

Table 1. Siebel Energy Solutions for Key Business Issues

Business Issue	Siebel Energy Solutions
Order configuration and management	<ul style="list-style-type: none"> <li>■ Siebel Configurator automates the generation of quotes and sales orders</li> <li>■ Tracking of relationships between sales, sales orders, and work orders</li> <li>■ Definition of process rules and automatic escalation of open sales orders</li> <li>■ Use of product classes and attributes, and product bundles in generating sales orders</li> <li>■ Provisioning of sales orders through work orders</li> </ul>
Pricing management	<ul style="list-style-type: none"> <li>■ A set of tools for defining pricing adjustments and the conditions under which they should be applied</li> <li>■ An engine that evaluates condition statements and determines which pricing adjustments to apply</li> <li>■ A testing area that allows assessment of the pricing adjustments</li> <li>■ Integration with end-user interfaces such as Quotes, Orders, Siebel eSales, Siebel Partner Relationship Management, and Siebel eConfigurator</li> </ul>
Siebel Marketing	<ul style="list-style-type: none"> <li>■ Analysis of customer information and measurement of campaign results with eIntelligence</li> <li>■ Creation and execution of targeted marketing campaigns</li> <li>■ Internet marketing with eMarketing: Integrated email campaigns, customized Web offers, personalized Web pages, Internet newsletters, and Internet surveys</li> </ul>
Third-party and legacy integration	<ul style="list-style-type: none"> <li>■ Prebuilt COM and CORBA interfaces to leading Operating System Software (OSS) and Enterprise Resource Planning (ERP) applications</li> <li>■ Integration mapping tools for cross-application process integration</li> <li>■ Siebel Enterprise Integration Manager (EIM), which allows bidirectional data exchange and synchronization</li> <li>■ Performing credit verification and address validation</li> <li>■ Maintenance of billing accounts through an external billing system</li> </ul>



Table 1. Siebel Energy Solutions for Key Business Issues

Business Issue	Siebel Energy Solutions
Trouble ticket and service request management	<ul style="list-style-type: none"> <li>■ Single platform for logging, assigning, managing, and resolving customers' problems, including network problems or outages affecting customers</li> <li>■ Online solutions search capability</li> <li>■ Proactive customer notifications through email, pager, fax, and Internet</li> <li>■ Automatic escalation of overdue trouble tickets and service requests</li> <li>■ Integration with external outage management systems</li> </ul>
Upselling and cross-selling	<ul style="list-style-type: none"> <li>■ Scripting engine that identifies upsell and cross-sell opportunities with every customer contact</li> <li>■ Product configuration system that prompts the salesperson to propose high-margin services</li> <li>■ Integrated asset management system that provides information about configuration at each service location</li> </ul>
Usage, billing, and service detail	<ul style="list-style-type: none"> <li>■ Access to customer usage and service information</li> <li>■ Summary customer data for account analysis</li> </ul>

## Product Modules and Options for Siebel Energy

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

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

**NOTE:** This guide documents Siebel Energy 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 Energy screens and views depends on your company's configuration of the application. For introductory information about using the Siebel Energy interface, see *Siebel Fundamentals*.

# Business Functions of Screens in Siebel Energy

The Siebel Energy interface includes procedure-specific screens. Some screens are used exclusively by administrators. [Table 2](#) lists the most frequently used Siebel Energy screen and views and the functions of the views in those screens.

Table 2. Siebel Energy 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 <a href="#">Chapter 3, "Accounts in Siebel Energy"</a> , <a href="#">Chapter 4, "Profiles in Siebel Energy"</a> , and <a href="#">Chapter 11, "Billing in Siebel Energy"</a> 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 <i>Siebel Applications Administration Guide</i>
Agreements	Create, generate, modify, approve, and track agreements.	See <a href="#">Chapter 6, "Agreements and Entitlements in Siebel Energy,"</a> in this guide
Assets	Manage information about products sold to accounts.	See <i>Siebel Field Service Guide</i>
Audit Trail	Creates a history of the changes that have been made in Siebel Energy.	See <i>Siebel Applications Administration Guide</i>
Briefings	Gather and format information from a number of different sources, both inside and outside your company, including the World Wide Web.	See <i>Siebel eBriefings Administration Guide</i>
Calendar	Create and display activities (including to-do activities) and share calendar information with co-workers.	See <i>Siebel Fundamentals</i>
Campaigns	Manage outbound communications with prospects targeted for a particular marketing effort.	See <i>Siebel Applications Administration Guide</i>
Contacts	Record and track business and personal contact information associated with an account, an opportunity, a trouble ticket, or service request.	See <a href="#">Chapter 5, "Contacts in Siebel Energy,"</a> in this guide

Table 2. Siebel Energy 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 <a href="#">Chapter 14, "Credit Management in Siebel Energy,"</a> in this guide
Entitlements	Associate entitlements with accounts, contacts, and products. Determine a customer's eligibility for service under its entitlements.	See <a href="#">Chapter 6, "Agreements and Entitlements in Siebel Energy,"</a> in this guide
Expense Reports	Manage expense-report information for your own expenses, or your team's expenses.	See <i>Siebel Applications Administration Guide</i>
Forecasts	Create business forecasts based on opportunities or products.	See <i>Siebel Applications Administration Guide</i>
Fraud Management	Manage and monitor customer fraud issues. Share data with third-party fraud management applications.	See <a href="#">Chapter 15, "Fraud Management in Siebel Energy,"</a> in this guide
Literature	Display company- and industry-related literature cataloged by the Siebel administrator.	See <i>Siebel Applications Administration Guide</i>
Opportunities	Manage sales opportunities for business and residential customers.	See <a href="#">Chapter 9, "Opportunities in Siebel Energy,"</a> in this guide
Orders	Create sales orders and track their status. Generate order summaries.	See <i>Siebel Order Management Guide</i> and <i>Siebel Order Management Guide Addendum for Industry Applications</i>
Premises	Create and maintain premises. Track service points, customer premise equipment, and meters associated with a premise.	See <a href="#">Chapter 7, "Premises in Siebel Energy,"</a> in this guide
Price Comparison	Creates quotes comparing in-house rate plans against competitors' rates	See <a href="#">Chapter 10, "Price Comparison in Siebel Energy,"</a> in this guide
Products	Display products, product lines, product features, and price lists.	See <i>Siebel Order Management Guide</i> and <i>Siebel Order Management Guide Addendum for Industry Applications</i>
Quality	Manage information about adverse events or reactions related to products.	See <i>Siebel Applications Administration Guide</i>
Quotes	Create, view, and update quotes. Update opportunities and configure solutions for quotes.	See <i>Siebel Order Management Guide</i> and <i>Siebel Order Management Guide Addendum for Industry Applications</i>

Table 2. Siebel Energy 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 <a href="#">Chapter 13, "Service Requests and Trouble Tickets in Siebel Energy,"</a> 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 <i>Siebel SmartScript Administration Guide</i>
Solutions	Search, organize, and add to a knowledge base of answers to service requests and trouble tickets.	See <i>Siebel Field Service Guide</i>
Trouble Tickets	Create, display, and update customer requests for information about or assistance with products or services.	See <a href="#">Chapter 13, "Service Requests and Trouble Tickets in Siebel Energy,"</a> in this guide
Work Orders	Manage the work components associated with activating or turning off service for a customer.	See <a href="#">Chapter 12, "Work Orders in Siebel Energy,"</a> in this guide

# 3

## Accounts in Siebel Energy

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.

This chapter includes the following topics:

- ["About Accounts in Siebel Energy"](#)
- ["Scenario for Accounts in Siebel Energy" on page 25](#)
- ["Setting Up External Organizations for Siebel Energy" on page 27](#)
- ["Creating an Account in Siebel Energy \(End User\)" on page 28](#)
- ["Creating an Account Hierarchy in Siebel Energy \(End User\)" on page 29](#)
- ["Reviewing an Account Hierarchy in Siebel Energy \(End User\)" on page 30](#)
- ["Accessing or Updating Account Information in Siebel Energy \(End User\)" on page 31](#)
- ["Monitoring Infrastructure, Equipment, and Usage in Siebel Energy \(End User\)" on page 32](#)

### About Accounts in Siebel Energy

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 Energy, 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 Energy 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 energy 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 Energy 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 Framework: Workflow Guide*.

Out of the box, Siebel Energy 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 manufacturing company has several industrial complexes, and each complex is made up of various manufacturing plants receiving electric and gas services. Each plant can have the electric and gas services set up as separate service accounts. The corporate headquarters can set up a service aggregate account for each type of manufacturing plant to track electric and gas usage per type of manufacturing process.

- **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: gas and electricity. 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 Energy 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 *Siebel Applications Administration Guide*.

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

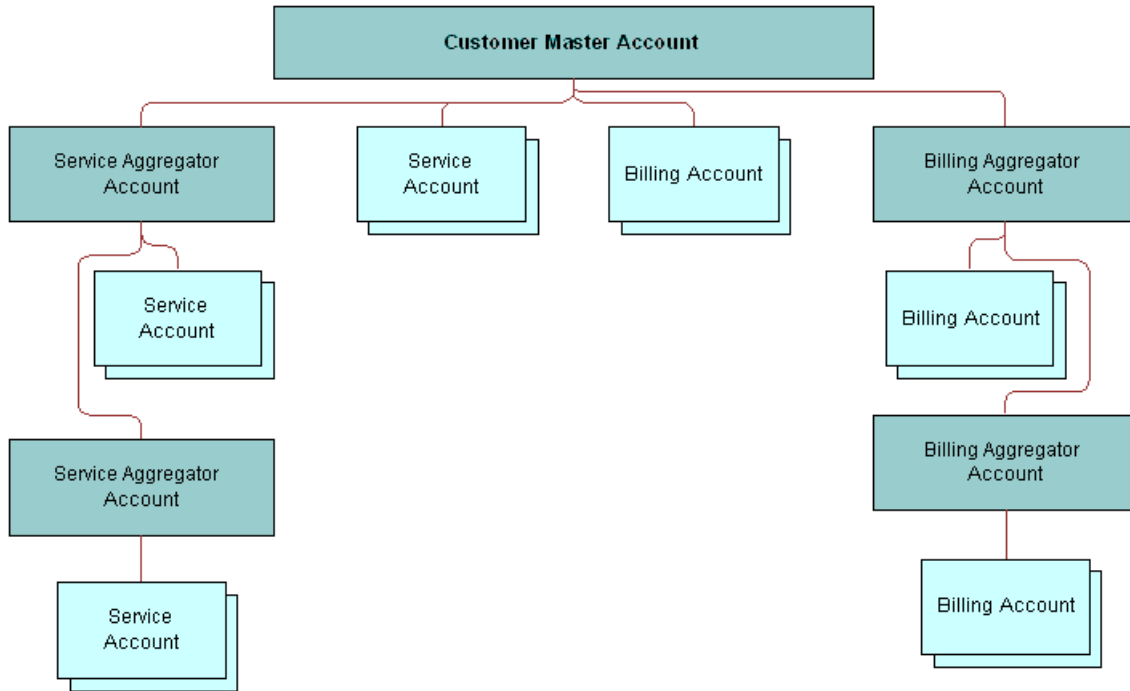


Figure 1. Example of Account Hierarchy

### 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	<p>Sales Administrator or Sales Manager</p> <ul style="list-style-type: none"> <li>■ Determines what information is required for an account</li> <li>■ Determines what account information is visible to each member of the sales force</li> <li>■ Reviews and analyzes account activity to measure performance and improve sales effectiveness</li> <li>■ Reviews account hierarchies developed by the sales staff</li> </ul>
End User	<p>Customer Service Representative</p> <ul style="list-style-type: none"> <li>■ Performs call center activities, primarily responding to customer inquiries and sales order requests</li> <li>■ Creates accounts for new customers, including the required key information for an account</li> <li>■ Updates accounts for existing customers</li> <li>■ Understands relationship between accounts and associated contacts</li> <li>■ Creates account hierarchies</li> <li>■ Understands account hierarchies and relationship of accounts within hierarchy</li> </ul>
	<p>Sales Representative</p> <ul style="list-style-type: none"> <li>■ Focuses on outside sales and customer relationship management</li> <li>■ Creates accounts for new customers, including the required key information for an account</li> <li>■ Updates accounts (such as creating a sales opportunity), creates sales orders, and tracks service requests or trouble tickets</li> <li>■ Creates account hierarchies, designating parent-child relationships among an organization's accounts</li> </ul>

## Scenario for Accounts in Siebel Energy

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](#).

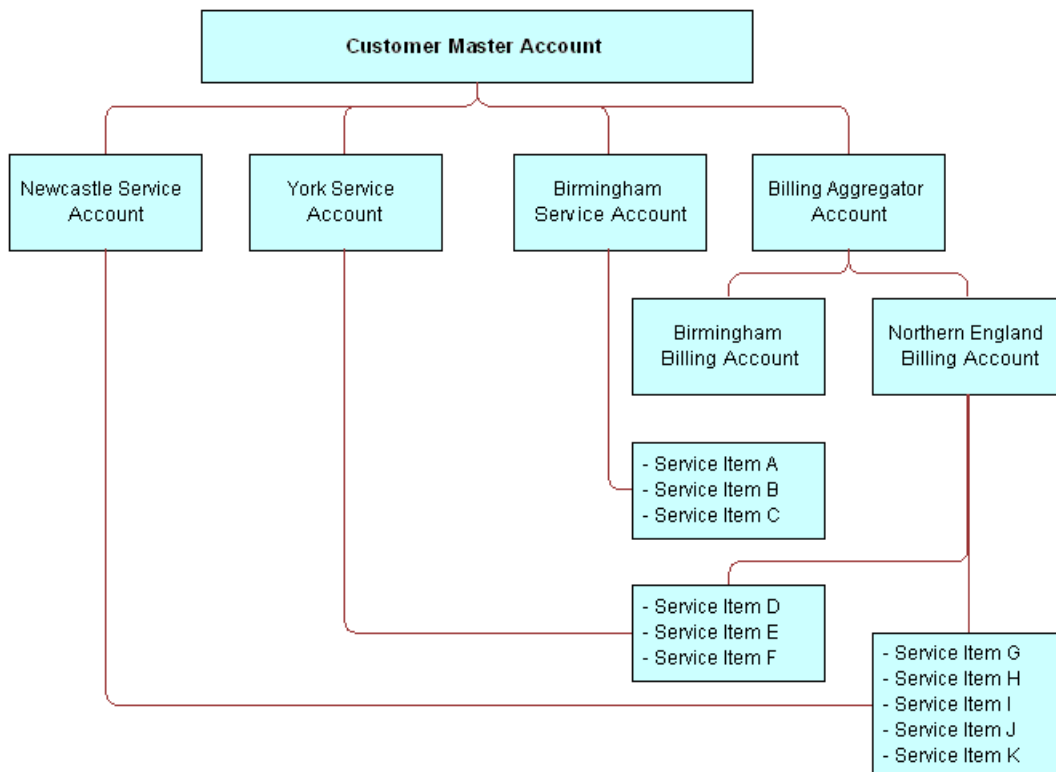


Figure 2. Account Hierarchy for Business Scenario

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 has noticed that some oil is leaking from a green box in her backyard. The CSR accesses the customer's account to determine what equipment might be malfunctioning and when it was previously checked.

Figure 3 shows the sequence of procedures an end user might perform to manage accounts:

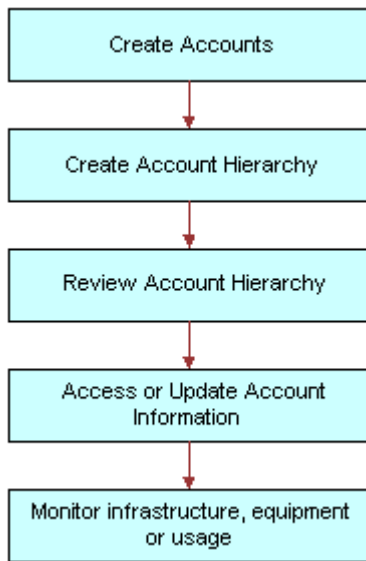


Figure 3. Example of Sequence for Accounts

## Setting Up External Organizations for Siebel Energy

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 *Siebel Security Guide*.

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 Energy (End User)

An account forms the major link for entering detailed information about customers. After adding accounts in Siebel Energy, 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	<p>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.</p> <p>For Account Class, select Customer if you are creating a residential customer account.</p> <p>For more information on account classes, see <a href="#">“About Accounts in Siebel Energy” on page 21</a>.</p>
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 <i>not</i> 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 <i>not</i> select Lock Assignment.
Site	Description of the location or function of the account, such as <i>headquarters</i> or <i>corporate</i> or <i>San Francisco</i> .
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 Energy, you can use a synonym instead of the actual name.

## Creating an Account Hierarchy in Siebel Energy (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 28](#).

**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 30](#). 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 Energy (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 Energy (End User)

Siebel Energy 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 Energy (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 energy-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 discounted rates on electricity to customers who install all-electric kitchen appliances, you might want to record information about the appliances currently installed in a large apartment building, or the future appliance needs of a developer who is building several new homes.

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 energy-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 energy-related infrastructure at the sites to which you provide services. Typical infrastructure information might include meter type, transformer size, voltage, phase, capacitors, and gas supply pressure. 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	An attribute of the infrastructure item, such as Substation or Transformer. 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 Energy

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.

This chapter includes the following topics:

- [“About Profiles in Siebel Energy”](#)
- [“Scenario for Profiles in Siebel Energy” on page 37](#)
- [“Creating and Updating a Profile in Siebel Energy \(End User\)” on page 41](#)
- [“About Billing Profiles in Siebel Energy” on page 41](#)
- [“About Customer Profiles in Siebel Energy” on page 42](#)
- [“About Energy Exemption Profiles” on page 42](#)
- [“About Energy Statement Profiles” on page 43](#)
- [“About Financial Profiles in Siebel Energy” on page 43](#)
- [“About Fraud Profiles in Siebel Energy” on page 45](#)
- [“About Loyalty Profiles in Siebel Energy” on page 45](#)
- [“About Site Profiles in Siebel Energy” on page 45](#)
- [“Creating and Updating an Address Profile in Siebel Energy \(End User\)” on page 46](#)

### About Profiles in Siebel Energy

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 Energy.

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. 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 Energy from its billing software or customer information system.
Energy Exemption Profile	Provides information about the special status of a customer, such as if the customer has life support, is a senior citizen, or has a credit problem.
Energy Statement Profile	Records billing statement preferences, including number of copies, media, contact requesting the statement, as well as energy supplier and aggregator 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.

**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 Energy, 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	<ul style="list-style-type: none"> <li>■ Focuses on call center activities, primarily responding to customer inquiries and sales order requests</li> <li>■ Understands account hierarchies, including the required key information for a profile</li> <li>■ Creates profiles for new customers, modifies and adds profiles for existing customers</li> </ul>
Sales Representative	<ul style="list-style-type: none"> <li>■ Focuses on outside sales and customer relationship management</li> <li>■ Understands account hierarchies, including the required information for profiles</li> <li>■ Creates profiles for new customers, modifies and adds profiles for existing customers</li> </ul>

## Scenario for Profiles in Siebel Energy

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 [“Scenario for Accounts in Siebel Energy” on page 25](#). 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.

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 Energy does not restrict how end users build hierarchies. If you want to enforce certain rules, you must set the rules up within Siebel Business Applications. This diagram shows one recommended use of profiles for specific account classes.

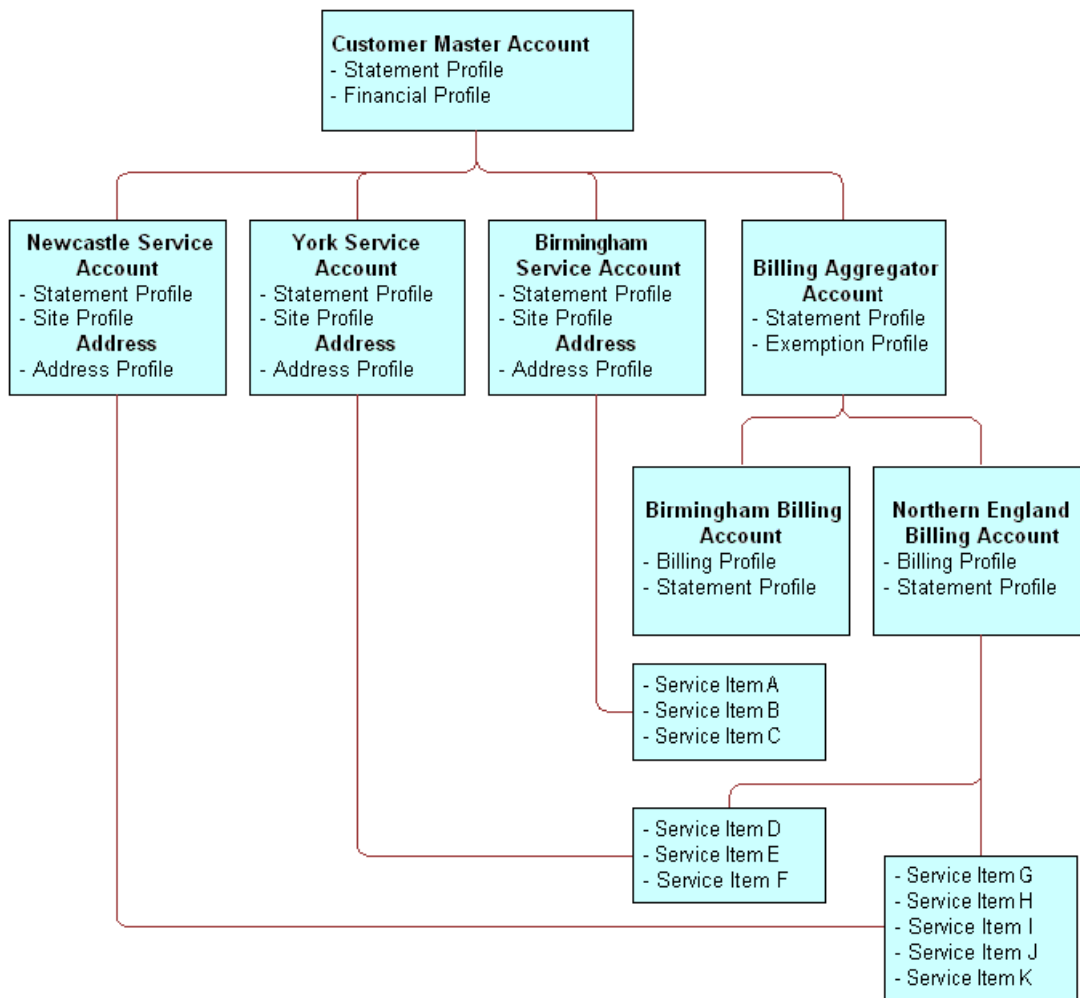


Figure 4. Business Scenario for Account Hierarchy and Profiles

Figure 5 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.

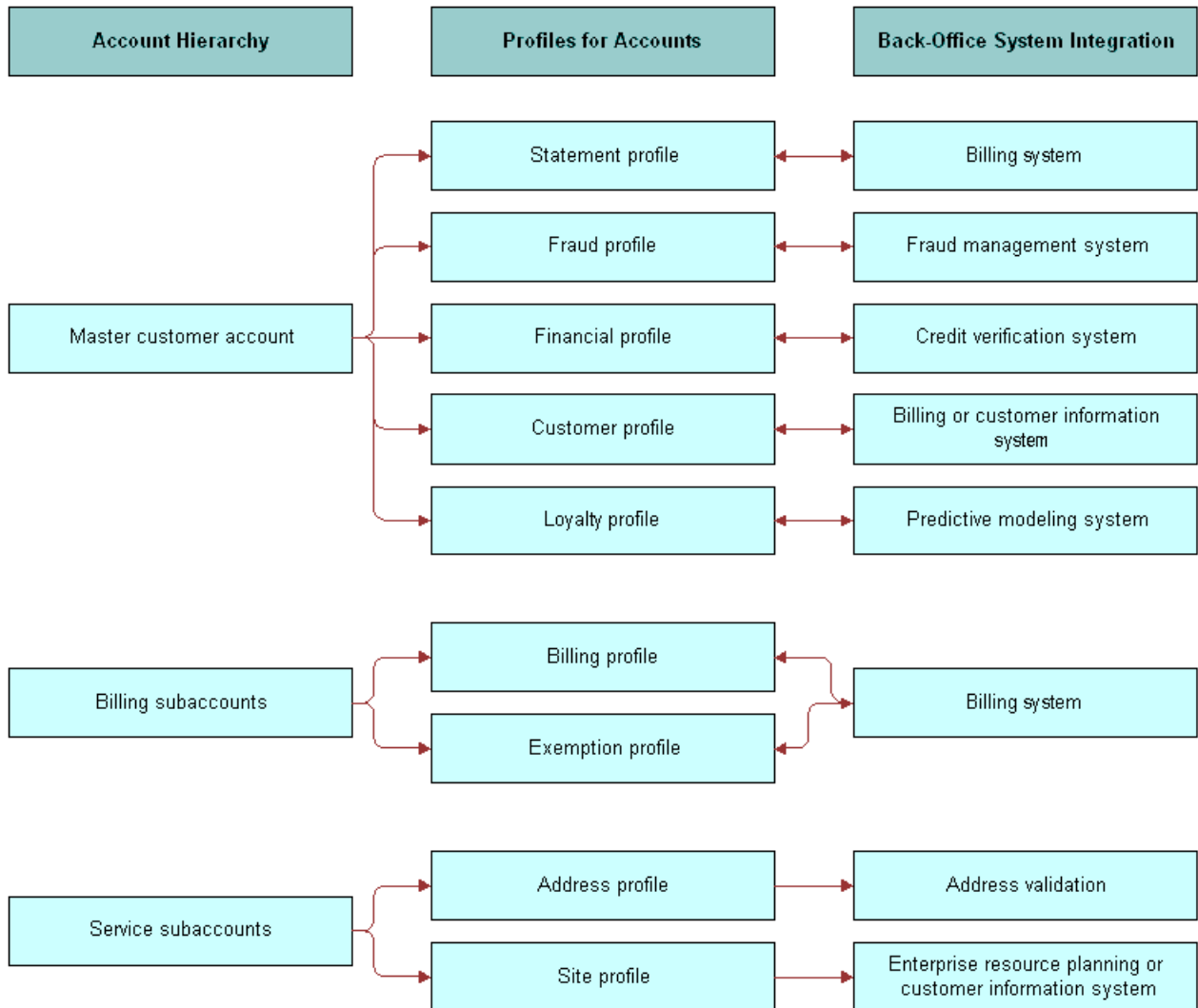


Figure 5. Interrelationships Among Accounts, Profiles, and Back-Office Systems



# Creating and Updating a Profile in Siebel Energy (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 Energy \(End User\)” on page 46](#).

## 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 Energy

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 Energy 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 Energy

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 Energy 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 Energy Exemption Profiles

End users create an energy exemption profile to store information about the special status of a customer, such as if the customer has life support, is a senior citizen, or has a credit problem.

Some fields in the Energy Exemption Profiles form are described in [Table 8](#).

Table 8. Energy 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.
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.
SPECIAL CUSTOMER		Shows which categories apply to this customer.

## About Energy Statement Profiles

End users create a statement profile to record billing statement preferences, including the number of copies, the media, and the contact requesting the statement, as well as the energy supplier and the aggregator information.

End users can create multiple statement profiles for an account if the billing system supports this.

Some fields in the Statement Profile are described in [Table 9](#).

Table 9. Energy Statement Profile Fields

Field	Comments
Aggregator	Organization that collects statements for several accounts.
Media	Media on which the statement is to be transmitted.
Vendor	Organization that prints or distributes bills.

## About Financial Profiles in Siebel Energy

End users create a financial profile to perform a credit check on the customer. To verify a customer's credit, Siebel Energy 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 10](#). However, different fields may appear according to the Account Type you selected (for example, Residential as the Account Type).

Table 10. 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 41 and [“About Financial Profiles in Siebel Energy”](#) on page 43 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 Energy

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 11](#).

Table 11. 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 Energy

The Loyalty Profile view contains scores generated by a back-office predictive modeling application. It helps predict customer churn, estimate debt risk, and identify upsell and cross-sell opportunities.

## About Site Profiles in Siebel Energy

A site profile contains detailed information about an account's location. Some fields in the Site Profiles form are described in [Table 12](#). To access all fields, click the show more button in the form.

Table 12. Site Profile Fields

Field	Comments
Cogeneration	Indicates that the site has the ability to generate its own energy but can also purchase electricity from an energy provider.
Open Market	Indicates if the site is either in an unregulated energy market or in a regulated one.

Table 12. Site Profile Fields

Field	Comments
Servicing Company	Energy service company or local distribution company that provides the energy service.
Supply Characteristics	Specifies if the site is inside or outside your company's standard service territory.

## Creating and Updating an Address Profile in Siebel Energy (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 Business 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.

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.

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 46](#)), but click the ReValidate button after [Step 4 on page 46](#) before continuing with the procedure.





# 5

## Contacts in Siebel Energy

A *contact* is someone about whom you or your company needs to keep business or personal information. Siebel Energy 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 Energy 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. It includes the following topics:

- [“Scenario for Contacts in Siebel Energy”](#)
- [“Adding a Contact in Siebel Energy \(End User\)” on page 50](#)
- [“Modifying a Contact Profile in Siebel Energy \(End User\)” on page 51](#)
- [“Creating a Contact-Related Activity in Siebel Energy \(End User\)” on page 51](#)
- [“Associating a Contact with a Trouble Ticket in Siebel Energy \(End User\)” on page 51](#)
- [“Additional End-User Tasks for Contact Management in Siebel Energy” on page 52](#)

### Scenario for Contacts in Siebel Energy

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.

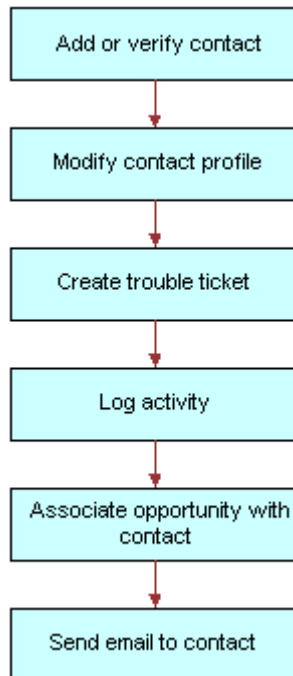


Figure 6. Example of Sequence for Contact Management

## Adding a Contact in Siebel Energy (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 *Siebel Applications Administration Guide*.

## Modifying a Contact Profile in Siebel Energy (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 Energy (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 Energy (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 13, "Service Requests and Trouble Tickets in Siebel Energy."](#)

### *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 Energy

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

### Contacts and Opportunities

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

### Contact Correspondence

End users can use Siebel Energy 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 *Siebel Applications Administration Guide*.

# 6

## Agreements and Entitlements in Siebel Energy

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 *Siebel Applications Administration Guide* and *Siebel Field Service Guide*.

This chapter includes the following topics:

- [“About Agreements and Entitlements in Siebel Energy”](#)
- [“Scenarios for Agreements and Entitlements in Siebel Energy” on page 55](#)
- [“Setting Up Templates for the Auto Document Feature of Siebel Energy” on page 57](#)
- [“Adding an Agreement in Siebel Energy \(End User\)” on page 58](#)
- [“Adding Agreement Terms and Generating Totals in Siebel Energy \(End User\)” on page 59](#)
- [“Creating and Printing an Agreement Document in Siebel Energy \(End User\)” on page 59](#)
- [“Associating an Agreement with an Order in Siebel Energy \(End User\)” on page 60](#)
- [“Associating an Agreement with a Service Item in Siebel Energy \(End User\)” on page 61](#)
- [“Revising an Agreement in Siebel Energy \(End User\)” on page 61](#)
- [“Viewing Agreement Details in the Explorer in Siebel Energy \(End User\)” on page 62](#)

## About Agreements and Entitlements in Siebel Energy

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 Energy 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 [“Types of Agreements” on page 54](#)).

## 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 Energy, 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 Energy. 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 Energy

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 commercial electric service to the customer's office. Account information for the customer is already present in Siebel Energy. Over the past two months, the account manager has created and maintained the opportunity, quotes, and proposals in Siebel Energy.

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 Energy associates the new service with the agreement.

The account manager then uses Siebel Energy to generate a physical service agreement. Using a predefined agreement template that the account manager selects, Siebel Energy 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 Energy 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.

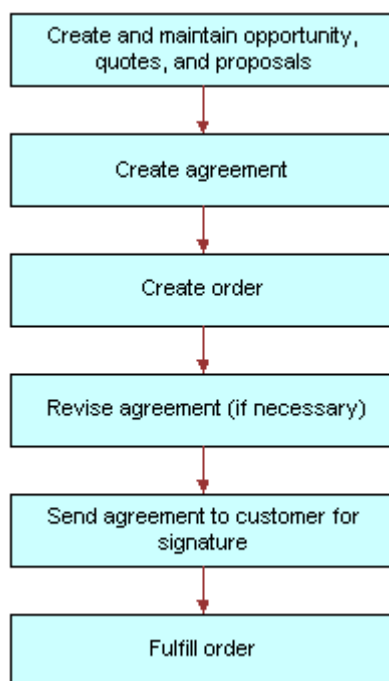


Figure 7. Example of Sequence for Agreements (Commercial)

### 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 sign up for your company's air conditioning maintenance program. She visits her local office to complete this transaction. The agent looks up her service agreement on the local office system, which is connected to Siebel Energy at company headquarters.



The agent then creates the order in Siebel Energy. When the order is created, Siebel Energy associates the new maintenance service with the customer's agreement. When the order is complete, Siebel Energy automatically updates the agreement with the new service. Finally, Siebel Energy issues requests to the appropriate back-office applications to provision the customer's air conditioning maintenance service.

Figure 8 shows the sequence of procedures that might be used to manage residential agreements.

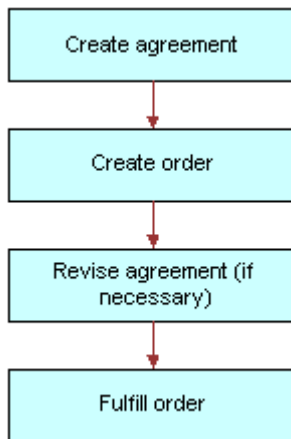


Figure 8. Example of Sequence for Agreements (Residential)

## Setting Up Templates for the Auto Document Feature of Siebel Energy

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 Energy (End User)

End users can add an agreement record to the Siebel Energy 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.

Field	Comments
Service	Indicates that this is a service agreement.
Start	The date on which agreement functionality begins.
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 Energy (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 Energy (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 Energy” on page 57.](#)

- 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 Energy 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 Energy (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 Energy (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 Energy (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 Energy 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 Energy (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 Energy

The premises functionality of Siebel Energy 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 energy services can be delivered. In Siebel Energy, 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 energy services. Siebel Energy 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 and meters. A *service point* is an asset that is installed at a particular service location and represents a network delivery point, such as a gas pipe.

A *meter* is a serialized item of customer premise equipment, such as a gas, electric, and water meter, that measures service usage. More than one meter can feed into a single service point, and service usage is accumulated and billed at the service point level.

Several procedures in this chapter involve an association between a record, such as a service point record, and a meter. It is assumed for this chapter that product and asset records for meters have already been entered into Siebel Energy. For more information about setting up a product, see *Siebel Product Administration Guide*.

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

Premise and meter information can be imported into Siebel Energy 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.

This chapter includes the following topics:

- “Scenario for Premises in Siebel Energy” on page 64
- “Setting Up Premises in Siebel Energy (End User)” on page 66
- “Registering a Premise Hookup in Siebel Energy (End User)” on page 67
- “Replacing a Meter for Maintenance (End User)” on page 68
- “Associating an Activity with a Premise in Siebel Energy (End User)” on page 69

- “Verifying a Premise in Siebel Energy (End User)” on page 69
- “Viewing Service Point and Meter Information (End User)” on page 69
- “Viewing Usage History in Siebel Energy (End User)” on page 70
- “Viewing Service Requests for a Premise in Siebel Energy (End User)” on page 70
- “Adding a Service Request for a Premise in Siebel Energy (End User)” on page 71
- “Adding Infrastructure Information in Siebel Energy (End User)” on page 72
- “Viewing Asset Information for a Meter (End User)” on page 72
- “Additional End-User Tasks for Premise Management in Siebel Energy” on page 73

Every instance of a service delivered to a particular premise needs a unique identifier, called a service item identifier. Services provided through a physical network connection (for example, a gas pipe) use the Service Point as the service item identifier. For companies that prefer not to differentiate between service points and meters (companies that use only the meter entity), the Service Point acts as the meter ID.

## Scenario for Premises in Siebel Energy

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

A new commercial facility is under construction, and the distribution company has developed plans to connect the facility to the network. Before the facility is actually connected, the distribution network planner creates a premise record for it in Siebel Energy and attaches two electronic files to the premise record. One file is the blueprint for the connection, and the other is a technical specification document.

A week later, field service engineers complete the connection of the new facility to the network and install a meter base (service point). The field service operations manager then enters network hookup information into Siebel Energy. To track this information, the manager first creates a service point record for the installed meter base and associates it with the premise.

Because the city must inspect all newly installed meter bases, the field service operations manager adds a record for that activity and associates it with the premise. After the inspection is completed, a field service technician installs the meter.

A record for the meter, which is a serialized product whose Type is defined as “Meter,” was previously entered into Siebel Energy. The field service operations manager next enters additional information about the meter by associating a note with the premise record. In addition, the manager associates an electronic file, which contains the hookup wiring schematic, with the premise.

A few weeks later, the occupant of the new facility moves in and calls to report that the meter is not working properly. The CSR who answers the call reviews information about the meter in Siebel Energy, including the date it was installed, its current status, and the date when it was last tested. He sees that the meter was only recently installed and has never been tested, and he records the problem by creating a service request.



In response to the creation of a service request, a field service engineer is dispatched to the facility and replaces the meter. In Siebel Energy, he records the date on which the old meter was removed and creates a record for the new meter that he installs. The new record includes the address of the premise and the service point with which the meter is associated.

Figure 9 shows the sequence of procedures that might be used to set up a commercial premise.

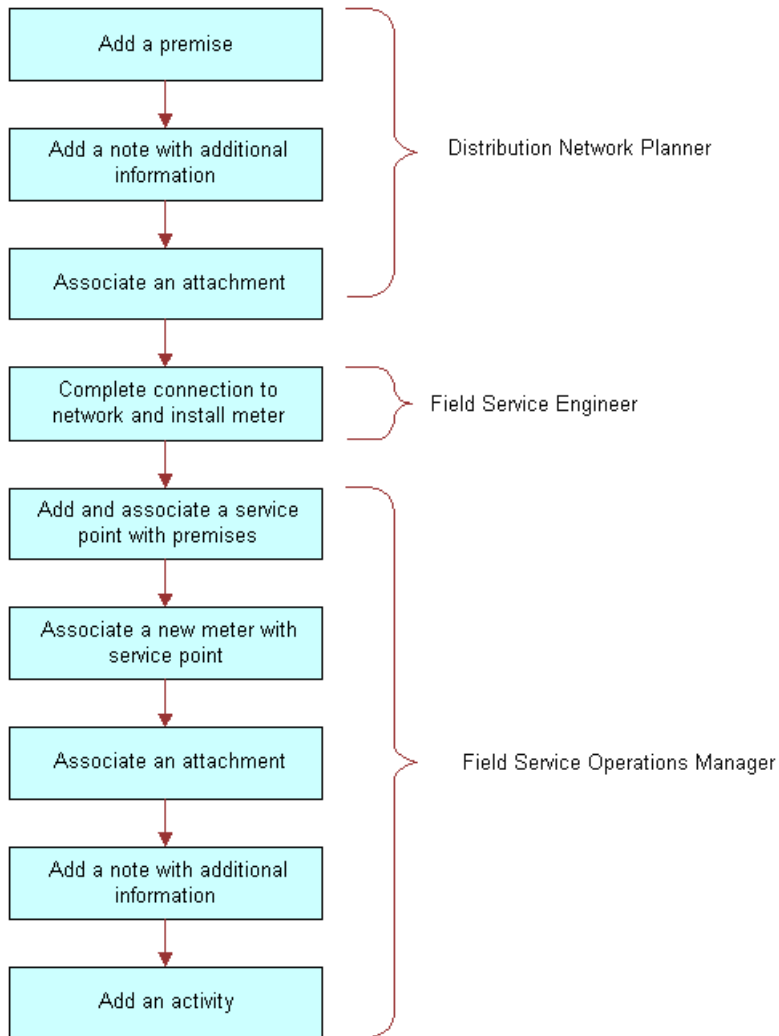


Figure 9. Example of Sequence for Initial Setup of a Commercial Premise

Figure 10 shows the sequence of procedures that might be used to maintain a commercial premise.

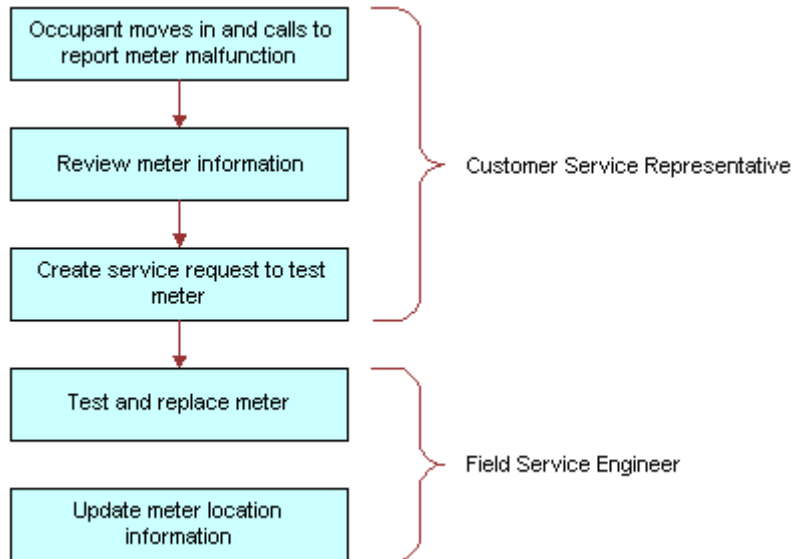


Figure 10. Example of Task Sequence for Maintenance of a Commercial Premise

## Setting Up Premises in Siebel Energy (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 ["To add a premise before the customer account exists" on page 67](#).

## Registering a Premise Hookup in Siebel Energy (End User)

Premises can be associated with one or more service points. If your application is configured to allow you to manage meters separately from service points, you can associate a meter with a premise through a service point. Otherwise, you can only associate a meter point (the meter) with a premise.

***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.

#### *To associate a meter with a service point*

- 1 Navigate to Administration - Data > Premises.
- 2 Click the Meter Location view tab.
- 3 In the Meter Location list, add a record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Meter Id	Identifier generated automatically when a meter record is created in Siebel Energy.
Start Date	Date the meter is associated with the service point.

## Replacing a Meter for Maintenance (End User)

A malfunctioning meter can be removed from service and replaced with one that works correctly. The original meter can then be repaired and installed at another location.

When a meter is removed or installed, the field service administrator must update Siebel Energy so the locations of meters owned by the company can be tracked.

#### *To record the date that a meter was removed*

- 1 Navigate to Administration - Data > Premises.

- 2 Click the Meter Location view tab.
- 3 In the Meter Location list, select a location.
- 4 In the End Date field, enter the date that the meter was removed.

## Associating an Activity with a Premise in Siebel Energy (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 Energy (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 67](#).

## Viewing Service Point and Meter Information (End User)

End users can view service point and meter information for the premise.

*To view service point and meter information for a premise*

- 1 Navigate to the Premises screen.
- 2 In the Premises list, click the name of a premise.
- 3 Click the Service Points view tab.
- 4 In the Service Points list, select a service point.

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.

- 5 Scroll down to the Meters list and select a meter.

## Viewing Usage History in Siebel Energy (End User)

Service usage is recorded at meters and accumulated for usage history and billing purposes at the service point level. 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 Energy."](#)

**NOTE:** Usage data may reside in an external data repository and be viewed in Siebel Energy 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 Service Points view tab.
- 4 In the Service 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 Energy (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 Energy (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.
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 Energy (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	An attribute of the infrastructure item, such as Substation ID or Transformer Type. 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. For example, if the Attribute is Voltage at Meter, a typical Value would be 240 volts.

## Viewing Asset Information for a Meter (End User)

End users can view asset information for a meter.

### *To view asset information for a meter*

- 1 Navigate to the Premises screen.
- 2 In the Premises list, click the name of a premise.
- 3 Click the Service Points view tab.
- 4 In the Service Points list, select a service point.



- 5 Scroll down to the Meters list, and drill down on the Meter Id hyperlink.

The Assets screen appears and displays information about the meter. Some fields are described in the following table.

Field	Comments
Asset #	Automatically generated when a new asset is created and associated with a product.
Serial #	User-assigned number for tracking.
Owner	Owner of the meter asset.

## Additional End-User Tasks for Premise Management in Siebel Energy

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 *Siebel 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 Energy."](#)

### 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 *Siebel 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 *Siebel Fundamentals*.



# 8

## Assets in Siebel Energy

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*.

This chapter includes the following topics:

- [“About Assets in Siebel Energy”](#)
- [“Scenario for Assets in Siebel Energy” on page 76](#)
- [“Associating Related Assets with a Primary Asset in Siebel Energy \(End User\)” on page 78](#)
- [“Viewing Hierarchical Information for an Asset in Siebel Energy \(End User\)” on page 78](#)
- [“Creating a Transaction for an Asset in Siebel Energy \(End User\)” on page 79](#)
- [“Viewing Components Associated with an Asset in Siebel Energy \(End User\)” on page 79](#)
- [“Adding a Service Request Associated with an Asset in Siebel Energy \(End User\)” on page 80](#)
- [“Adding a Change Request Associated with an Asset in Siebel Energy \(End User\)” on page 80](#)
- [“Viewing Service Points and Services in Siebel Energy \(End User\)” on page 81](#)
- [“Viewing or Entering a Meter Reading in Siebel Energy \(End User\)” on page 82](#)

### About Assets in Siebel Energy

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 meters, service points, and energy 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 Energy 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 gas and an electric service point can have identical asset numbers for different products.

Asset management and tracking are important parts of help desk systems and field service applications. Siebel Energy 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, such as meters, 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 Energy 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 Energy

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 an energy 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). The field service representative drives out to the premise. He determines that the meter has malfunctioned and captures the meter reading in Siebel Energy.

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

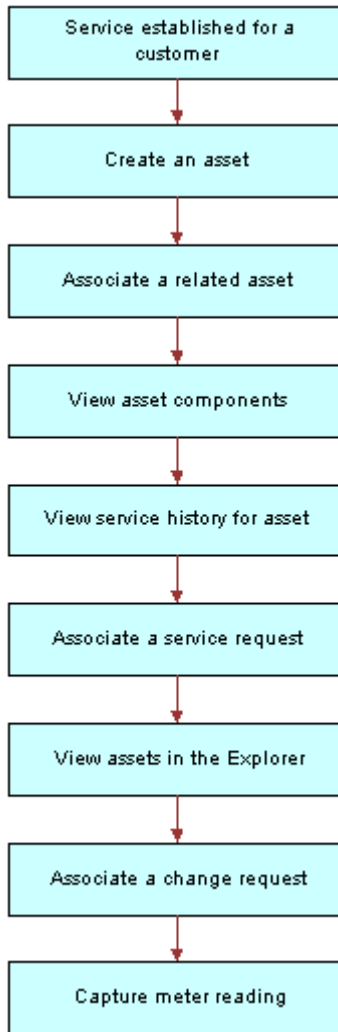


Figure 11. Example of Sequence for Assets

## Creating an Asset in Siebel Energy (End User)

End users can create assets and enter asset information in Siebel Energy, 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 Energy. 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 Energy (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 Energy (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 Energy (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 Energy (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 Energy (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 Energy (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 Energy (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 67](#).

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.

## Viewing or Entering a Meter Reading in Siebel Energy (End User)

End users can view the types of readings taken and can enter actual readings.

**NOTE:** Field service agents can also enter meter readings in the Activities Readings view. For more information, see *Siebel Field Service Guide*.

### *To enter meter readings*

- 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 a meter asset.
- 4 Click the Measurements view tab.  
The Measurements list appears with the Measurements form beneath it.
- 5 In the form, add a record and complete the necessary fields.

### *To view meter readings*

- 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 a meter asset.
- 4 Click the Readings view tab.
- 5 In the Readings list, select a record.  
The lower Readings list displays the readings for that meter.

# 9

## Opportunities in Siebel Energy

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 Energy, 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

From the Opportunities screen, CSRs can run the Price Comparison feature. The Price Comparison feature generates annual costs for both in-house and competitors' electric and gas services. The feature calculates savings for existing and prospective customers if they choose to change rate plans. For more information on this feature, see [Chapter 10, "Price Comparison in Siebel Energy."](#)

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:

- *Siebel Product Administration Guide*
- *Siebel Pricing Administration Guide*
- *Siebel Order Management Guide Addendum for Industry Applications*

This chapter includes the following topics:

- ["Scenario for Opportunities in Siebel Energy" on page 84](#)
- ["Creating an Opportunity in Siebel Energy \(End User\)" on page 85](#)
- ["Associating an Account with an Opportunity in Siebel Energy \(End User\)" on page 86](#)
- ["Associating a Product with an Opportunity in Siebel Energy \(End User\)" on page 86](#)
- ["Creating a Quote for an Opportunity in Siebel Energy \(End User\)" on page 87](#)
- ["Creating a Profile for an Opportunity in Siebel Energy \(End User\)" on page 88](#)
- ["Associating a Site with an Opportunity in Siebel Energy \(End User\)" on page 89](#)

- [“Associating a Partner with an Opportunity in Siebel Energy \(End User\)” on page 89](#)
- [“Additional End-User Tasks for Opportunity Management in Siebel Energy” on page 90](#)

## Scenario for Opportunities in Siebel Energy

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 Energy. 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 Energy.

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 Energy:

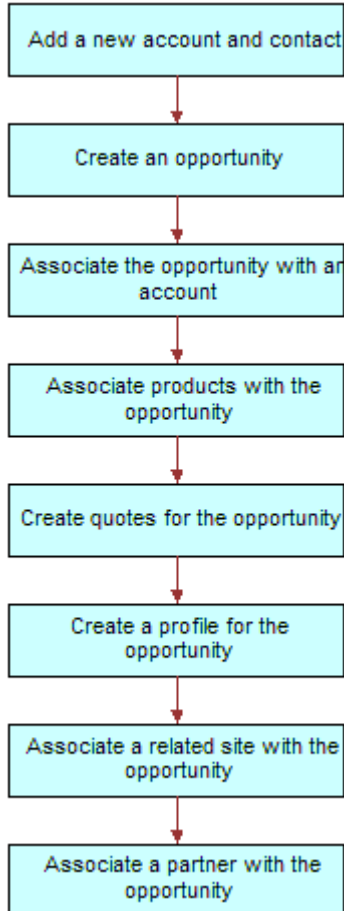


Figure 12. Example of Sequence for Opportunities

## Creating an Opportunity in Siebel Energy (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 Energy (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 Energy (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 Energy (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 *Siebel 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 86](#)).

If these conditions are not met, Siebel Energy 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 Energy (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 Energy (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 Energy (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 Energy

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 Energy."](#) For more information about entering a contact, see [Chapter 5, "Contacts in Siebel Energy."](#)

# 10 Price Comparison in Siebel Energy

This chapter describes the basic concepts behind the Price Comparison feature available in Siebel Energy. It also provides some business scenarios that illustrate the sequence of tasks users might perform with the new feature. In addition, the chapter explains procedures for setting up rate plans, generating annual costs for those plans, and viewing costs comparing competitors' rates with in-house rates.

Administrators, such as pricing managers or call center administrators, will benefit from reading this chapter. Pricing managers will learn how to set up rate plans and run reports. Other administrators or managers will see how customer service representatives (end users) use the Price Comparison feature. After becoming familiar with the end-user procedures, administrators and configurators can customize the software to fit their company's needs.

For further information about setting up products, price lists, and ordering, see these guides:

- *Siebel Product Administration Guide*
- *Siebel Pricing Administration Guide*
- *Siebel Order Management Guide*
- *Siebel Order Management Guide Addendum for Industry Applications*

For technical information on the background logic of the price comparison functionality, see [Appendix A](#).

This chapter includes the following topics:

- "About Price Comparison in Siebel Energy"
- "Rate Plans with Tier-Based Pricing" on page 93
- "Scenarios for Price Comparison in Siebel Energy" on page 95
- "Sample Sequence for Price Comparison" on page 97
- "Process of Setting Up Price Comparison" on page 97
- "Running Reports in Siebel Energy" on page 103
- "Accessing Price Comparisons (End User)" on page 104
- "Generating a Price Comparison (End User)" on page 104
- "Enrolling a Customer for a Service in Siebel Energy (End User)" on page 105

## About Price Comparison in Siebel Energy

The Price Comparison feature available in Siebel Energy determines the annual cost for services, such as gas or electricity, to existing or prospective customers. It then compares the existing cost against the internal rates that reside in the Siebel database and provides comparative quotes to the customer. After reviewing the quotes, customers can enroll for the service your company offers.

This list provides an overview of the steps involved with the Price Comparison feature:

- 1 The Price Comparison feature is accessed in one of these methods:
  - From a Web site, a customer or prospective customer requests a list of comparative rates for services. The entry point is through Siebel eSales.
  - A customer service representative (CSR) creates an opportunity in Siebel Energy and selects the Price Comparison feature.
- 2 A SmartScript session begins to collect customers' answers to a series of questions regarding their current services and rates.
- 3 At the end of the SmartScript session, the Price Comparison feature converts this customer-provided information into an annual cost.

The annual cost is used to determine the customer's usage based on the competitor's rate plan information. For a more detailed explanation, see [Appendix A](#).
- 4 The Price Comparison feature finds in-house rate plans that match the attributes of the competitor's rate plan.
- 5 The Price Comparison feature calculates the projected annual cost for each matching rate plan based on the usage from [Step 3](#) and displays the quotes.
- 6 If the CSR is running the Price Comparison feature, the CSR can choose to mail, email or fax a copy of the displayed quotes to the prospect.
- 7 The customer selects a rate plan and begins the enrollment process.
- 8 The next step depends on which application was used to begin the price comparison process:
  - If the process began through Siebel eSales, new customers must log in and register. Customers who already have products in their shopping cart can add the rate plan to their shopping cart.
  - If the process began through Siebel Energy, the CSR provides the necessary account information for new customers. For accounts already associated with the opportunity, the information is automatically filled in.
- 9 The typical order workflows occurs to provision the order.

The Price Comparison feature calls workflows, methods, and processes, which form the background logic for the feature. For detailed information on the business services and workflows involved, see [Appendix A](#).

## Rate Plans with Tier-Based Pricing

Rate plans in Siebel Energy can accommodate complex product bundles and pricing schemes. Administrators set up root products with the Usage products as subcomponents. Each product must have a Service Type field set, such as Electricity or Gas, in order to limit the price comparison to the correct product category.

Administrators can set up the plans to reflect variations in service, region, time of the day or year (for example, day, night, weekends, summer, or winter), payment methods, payment duration, credit risk, and so on. The administrator can extend this list by adding attributes to the appropriate product class.

In this example, the rate plans assure full selection of all components. The pricing manager sets up electricity rate plans and gas rate plans. The different combinations of attributes give rise to different rates within the same rate plan. [Table 13](#) shows several rate plan examples.

Table 13. Rate Plan Examples

Class	Root Product	Subcomponents	Tier Pricing	Attributes	List Price
Electricity	StandardWith StandingCharge				\$15 per month
		StandardWith StandingCharge Usage	1-1000=\$0.12	Region=North MeterType=Credit PaymentType=Automatic Debit Usage Type= <b>Threshold</b>	\$0
			1-1000=\$0.10 1001-2000=\$0.08 >2000=\$0.05	Region=North MeterType=Credit PaymentType=Automatic Debit Usage Type= <b>Peak</b>	\$0
			1-1000=\$0.08 1001-2000=\$0.05 >2000=\$0.03	Region=North MeterType=Credit PaymentType=Automatic Debit Usage Type= <b>Off Peak</b>	\$0
Electricity	StandardWith NoStandingCharge				\$0 per month

Table 13. Rate Plan Examples

Class	Root Product	Subcomponents	Tier Pricing	Attributes	List Price
		StandardWith NoStandingCharge Usage	1- 1000=\$0.12	Region=North MeterType=Credit PaymentType=Automatic Debit Usage Type= <b>Threshold</b>	\$0
			1- 1000=\$0.10 1001- 2000=\$0.08 >2000=\$0.05	Region=North MeterType=Credit PaymentType=Automatic Debit Usage Type= <b>Peak</b>	\$0
			1- 1000=\$0.08 1001- 2000=\$0.05 >2000=\$0.03	Region=North MeterType=Credit PaymentType=Automatic Debit Usage Type= <b>Off Peak</b>	\$0
Gas	GasWith StandingCharge				\$10 per month
		GasWithStanding ChargeUsage	1- 1000=\$0.12	Region=North MeterType=Credit PaymentType=Automatic Debit Usage Type= <b>Threshold</b>	\$0
			1- 1000=\$0.10 1001- 2000=\$0.08 >2000=\$0.05	Region=North MeterType=Credit PaymentType=Automatic Debit Usage Type= <b>Peak</b>	\$0
			1- 1000=\$0.08 1001- 2000=\$0.05 >2000=\$0.03	Region=North MeterType=Credit PaymentType=Automatic Debit Usage Type= <b>Off Peak</b>	\$0

Table 13. Rate Plan Examples

Class	Root Product	Subcomponents	Tier Pricing	Attributes	List Price
	GasWith NoStandingCharge				\$0 per month
		GasWith NoStandingCharge Usage	1- 1000=\$0.12	Region=North MeterType=Credit PaymentType=Automatic Debit Usage Type= <b>Threshold</b>	\$0
			1- 1000=\$0.10 1001- 2000=\$0.08 >2000=\$0.05	Region=North MeterType=Credit PaymentType=Automatic Debit Usage Type= <b>Peak</b>	\$0
			1- 1000=\$0.08 1001- 2000=\$0.05 >2000=\$0.03	Region=North MeterType=Credit PaymentType=Automatic Debit Usage Type= <b>Off Peak</b>	\$0
	DualFuelWith StandingCharge				\$0 per month
		StandardWith StandingCharge			\$15 per month
		GasWith StandingCharge			\$10 per month

These complex rate plans are usually maintained in external billing and pricing systems. They are matched up with the actual consumer usage when generating a utilities bill.

## Scenarios for Price Comparison in Siebel Energy

These scenarios show sequences of procedures performed by a pricing manager (administrator), customer service representative (end user), and new customer (end user) requesting price comparisons over a Web site. Your company may follow different sequences according to its business requirements.

## Pricing Manager Sets Up Rate Plans

Your company's pricing manager creates a rate plan as a new customizable product and associates a class with it that defines its attributes. For this customizable product, she wants Payment Type to be the attribute of the parent rate plan so that the attribute will be inherited by its subcomponents. She then creates another product as a subcomponent to represent the different usage types and associates it with the same class.

Next, the pricing manager sets up tier pricing for the class, specifying different tiered rates for different attribute combinations. She sets up a price list for her company and for each of the competitors. She adds both the root product and subcomponents as price list items. She associates the tier pricing with the subcomponents.

A month later, the pricing manager receives the latest publication of residential rates for a major competitor, so she updates her data with the most current information for each rate for that competitor.

Next, she realizes that the competitor has introduced a new rate plan into the market. Because her company does not have an equivalent rate, she creates a new rate product for the competitor's plan and adds it to the competitor's price list.

She can then also model the relevant pricing structure. When a customer service representative or a prospective customer chooses this rate, the comparison will report that there is no equivalent or like-for-like rate plans and return only those rate plans that match the attributes of the competitor's product or service.

The next rate on her market intelligence gathering list is from a new competitor and therefore not in the database. She sets up a new price list for that competitor, and adds the existing equivalent rate products. She also notes that the rate is only offered within the city limits of Richardson, so she creates a rate structure for which the Region attribute has a value of Richardson.

## Pricing Manager Analyzes Rate Plans

The pricing manager runs a report each month to compare her company's rates with other competitors in the service area. She needs to review the effectiveness of her company's rate plans, the introduction of competitors' rate plans, and the redesigning of new rate plans to capture the market share needed.

The pricing manager first runs a report that lists all the competitors, their rate plans, and the cents/kWh for peak, off-peak, and weekend rates associated with each rate plan. This gives her a good idea of the dynamics in the marketplace.

She next runs a report consolidating the customers' inputs, choices and decision, for every single time the pricing calculator was run for a given time period, displaying the region, service (gas, electric, or both), competitor, rate plan, savings, and if they switched to National Energy. This data assists her in measuring the effectiveness of her rate plans in customer acquisition.

## Prospective Customer Compares Prices and Enrolls Over the Web

Mr. Mathis, an energy customer with service provided by a competing firm, goes to a Web site to follow up on a price comparison ad he saw.



Mr. Mathis is prompted to answer a series of questions. For the first question, he indicates that he wants to receive both gas and electricity service from this company. For his electricity service provider, he selects from a drop-down list that is specific to his region. That action triggers another drop-down list to appear from which he specifies his current service tariff or rate.

Looking at his most recent bill, Mr. Mathis enters his quarterly costs. Since he has chosen gas and electric, he then answers similar questions concerning his gas service, and then clicks Finish.

Based on the gathered information, the Price Comparison calculator generates his projected annual bill. For each of the company's rate plans, he also sees the savings he will achieve by switching to the company.

Mr. Mathis selects the rate plan that saves him the most money and then clicks the Enroll button. He is then brought to a view that has the proper orderable service entered as a line item. Because he is not an existing customer, Mr. Mathis is required to go through new user registration before he can complete the transaction online.

## Sample Sequence for Price Comparison

This example sequence for price comparison is performed by administrators and CSRs. Your company may follow a different sequence according to its business requirements.

### Administrator Procedures

Administrators may want to perform the procedures in the order shown here.

- 1 **Set up rate plans (products).** See ["Setting Up Products for Rate Plans"](#) on page 98.
- 2 **Set up price lists.** See ["Setting Up Price Lists for Rate Plans"](#) on page 101.
- 3 **Set up usage profiles.** See ["Setting Up Usage Profiles"](#) on page 102.
- 4 **Match rate plans.** See ["Matching Competitors' Rate Plans with In-House Rate Plans"](#) on page 103.
- 5 **Run reports.** See ["Running Reports in Siebel Energy"](#) on page 103.

### End-User Procedures

End users may want to perform the procedures in the order shown here.

- 1 **Access the Price Comparison feature.** See ["Accessing Price Comparisons \(End User\)"](#) on page 104.
- 2 **Generate price comparison.** See ["Generating a Price Comparison \(End User\)"](#) on page 104.
- 3 **Enroll customer for service.** See ["Enrolling a Customer for a Service in Siebel Energy \(End User\)"](#) on page 105.

## Process of Setting Up Price Comparison

To set up the price comparison feature, perform the following tasks:

- 1 [“Setting Up Products for Rate Plans” on page 98](#)
- 2 [“Setting Up Price Lists for Rate Plans” on page 101](#)
- 3 [“Setting Up Usage Profiles” on page 102](#)
- 4 [“Matching Competitors’ Rate Plans with In-House Rate Plans” on page 103](#)

For rate plan examples, see [“Rate Plans with Tier-Based Pricing” on page 93](#).

## Setting Up Products for Rate Plans

To set up products, administrators must first set up classes to be associated with the products. For rate plans, classes describe the type of service, such as Electricity or Standard Electric Services.

As part of defining classes, administrators create attributes, such as Meter Type, that get inherited by the products associated with that class. They also define the list of values available to the end user for each attribute of the class.

After that, administrators create and define the root products that should belong to the new class. To the root product, they add subcomponents, which are the usage products.

For more information on class systems and products, see *Siebel Product Administration Guide* and *Siebel Order Management Guide Addendum for Industry Applications*.

This task is a step in [“Process of Setting Up Price Comparison” on page 97](#).

## Attributes of Class Administration

Before proceeding with the procedures in this section, read this background information on the attributes of class administration.

In general, there are two categories of List of Values (LOVs) in Siebel applications:

- One type is used for setting up Dynamic Attributes, described as part of the procedures in this section.
- One type is used everywhere else in the application, including in the Price Comparison SmartScript.

Therefore, if you follow the procedure described in this section to set up a dynamic attribute in Class Administration for use in Price Comparison, you will probably want to do the following:

- Associate a List of Values to each dynamic attribute
- Make the LOVs represent the possible answers to a corresponding question about customer's billing details in the Price Comparison SmartScript.

Because of the different categories of LOVs in Siebel applications, you need to set up two different LOV types with the same set of values. The first one you set up here in Class Administration, while the other one you set up in the regular LOV administration (see *Siebel Applications Administration Guide*).

Out of the box, Siebel Energy has already set up the LOV types and values for two dynamic attributes: Meter Type and Payment Method. The corresponding LOV types used in the Price Comparison SmartScript are UT\_METER\_TYPE and PAYMENT\_METHOD.

In addition, for Region and Usage Type, you do not need to set up the regular LOVs. This is because Region does not use LOVs (it uses a special BusComp to hold the possible values), and Usage Type is not exposed in the SmartScript questions at all.

**To set up classes for rate plans**

- 1 Navigate to Administration - Application > Class Administration.
- 2 In the Classes list, add a record.  
Typical class names are Electric Service, Gas Service, and Standard Electric Service.
- 3 Click the Dynamic Attributes view tab.
- 4 In the Dynamic Attributes list, add a record and do these steps:
  - a In the LOV Type field, click the select button.
  - b In the Pick List of Values Type dialog box, select an existing type or add a record for a new LOV type.
  - c In the Dynamic Attributes list, drill down on the LOV Type hyperlink.
  - d In the List of Values - Type list, add a record for each value that an end user can select for that LOV type.
- 5 Repeat [Step 4](#) for each attribute you want to include.  
Typical examples include Meter Type, Payment Method, Region, and Usage Type.

**NOTE:** There are special considerations when setting up dynamic attributes for use in the Price Comparison feature. To make sure you are setting up the dynamic attributes correctly, see [“Attributes of Class Administration”](#) on page 98.

**To create root products for rate plans**

- 1 Navigate to the Product Administration screen.
- 2 In the form, add a record. To access more fields, click the show more button in the upper-right corner of the form.
- 3 In the Class field, select the class you created for this service.
- 4 In the new record, complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Price Type	Displays the price type, such as Recurring (recommended for root product).
Service Type	Displays the service type, such as Electricity or Gas.

Field	Comments
Type	Displays the type of product, such as Service.
UoM	Displays the unit of measurement. Per Month is the only UoM supported for the standing charge.

**To create usage products**

- You must create the usage products before you can add them as subcomponents. Follow the procedure, ["To create root products for rate plans" on page 99](#), with these differences:
  - a For Price Type, select Usage.
  - b For UoM, select the appropriate unit of measurement, such as kWh.

**To set up usage products**

- 1 Navigate to the Product Administration screen.
- 2 In the Products list, click the name of the root product.
- 3 Click the Customizable Product view tab.  
The Product form appears with the Lock/Unlock Product list and Versions list beneath it.
- 4 In the Lock/Unlock Product list, open the menu and select Create Workspace.
- 5 In the Lock/Unlock Product list, select Locked Flag.
- 6 From the lower Show drop-down list (beneath the Product form), select Product Designer.
- 7 In the Product Designer list, add a record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Default	Default number of instances of this product. Typically, this is the same as the maximum.
Maximum	Maximum number of instances of the products that is allowed. This should equal the number of types of usage. For example, if rates for usage are split into peak, off peak, and threshold, the maximum should be set to 3.
Minimum	Minimum number of instances of the products that is allowed.
Product	Select an existing usage product.

- 8 From the lower Show drop-down list, select Product Versions.
- 9 In the Lock/Unlock Product list, open the menu and select Refresh Workspace.
- 10 Click Release New Version.

## Setting Up Price Lists for Rate Plans

For rate plans, administrators use attribute-based pricing and tier-based pricing to give each variation of the master rate plan a rate. Therefore, administrators need to first set up tier-based pricing and then set up price lists for the products.

This task is a step in [“Process of Setting Up Price Comparison” on page 97](#).

### To set up tier-based pricing

- 1 Navigate to the Product Administration screen.
- 2 In the More Info form, add a record and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Class	Use a class associated with the rate plan and usage products.
Type	Select Multiple Attributes.
Default Starting Adjustment Type	Tier Based

- 3 Click the Attributes view tab.
- 4 In the Attributes list, add a record for each attribute that you want to affect the price.
- 5 Click the Adjustment Item Generator view tab.
- 6 In the Adjustment Item Generator list, select the first attribute.
- 7 In the Item Generator list, check all values that you want to affect the pricing.
- 8 Repeat [Step 6](#) and [Step 7](#) for all attributes.
- 9 Click Generate.
- 10 In the Items list, select an attribute combination.
- 11 Click the select button in the Tier Price field, and add a record in the Tier Price dialog box for each tier.

**NOTE:** The minimum quantity of the first tier must be 1. Tiers must not overlap and there must be no gaps. A maximum quantity is not required for the last tier.

- 12 Repeat [Step 10](#) and [Step 11](#) for each attribute combination.

**NOTE:** Repeat this procedure until you have created as many tier pricing items as are required.

### To set up price lists for the rate plans

- 1 Navigate to the Pricing Administration screen.
- 2 In the link bar, click Price List.

- 3 Click the More Info view tab.
- 4 In the More Info form, add a record for a new price list.
- 5 For Type, select PC INHOUSE PRICE LIST or PC COMPETITOR PRICE LIST.
- 6 Click the Price List Line Items tab.
- 7 In the Price List Items list, add a record for each product (root product and usage subcomponent).
- 8 For each subcomponent product, select the appropriate tiered pricing in the Attribute Pricing column.
- 9 In the List Price field, select the standing charge as the list price of the root product.

## Setting Up Usage Profiles

Administrators must set up the usage information that the price comparison feature uses to determine annual costs. This information includes data about the regions and multipliers to take into account for seasons when converting bills into annual costs.

This task is a step in [“Process of Setting Up Price Comparison” on page 97](#).

### *To set up a usage profile*

- 1 Navigate to Product Comparison > PC Usage Profile.
- 2 In the PC Usage Profile list, add a record for the region.  
The region should be one that you entered as a list of values for the region attribute of that class.
- 3 Complete the necessary fields. Some fields are described in the following table.

Field	Comments
Peak Usage	Must be decimal value less than 1 that represents the proportion of usage that is during peak hours for a typical customer in that region. Example: 0.3
Off Peak Usage	Must be decimal value less than 1 that represents the proportion of usage that is during off peak hours for a typical customer in that region. Example: 0.7
Summer Multiplier	The multiplier to be used to convert a quarterly bill amount into an annual amount for a typical customer in that region. Example: 5
Winter Multiplier	The multiplier to be used to convert a quarterly bill amount into an annual amount for a typical customer in that region. Example: 3

## Matching Competitors' Rate Plans with In-House Rate Plans

Administrators need to specify which rate plans should be compared against each other to produce like-for-like quotes.

This task is a step in ["Process of Setting Up Price Comparison"](#) on page 97.

### *To match competitors' rate plans with in-house rate plans*

- 1 Navigate to Product Comparison > Relationships.
- 2 In the Competitor Product field, select a competitor's rate plan.
- 3 In the Orderable Product field, select the in-house rate plan that is the equivalent of the competitor's rate plan.

## Running Reports in Siebel Energy

The Price Comparison feature provides two reports, which are both used only by administrators:

### ■ The Price Comparison Administrative Report

This report displays the competitor's name; the equivalent rate plan; the pricing at each tier for that rate plan; the day, night and weekend pricing for that rate plan; the projected annual bill for that rate plan; and the difference in price between the in-house and the competitor's rate plan.

When the report is run, the report returns the price comparison data matching the requirements set in the Price Comparison Admin Reports parameters view.

### ■ The Competitive Pricing Report

This report displays the competitor's name, equivalent rate plan, projected annual bill and the difference in cost between the in-house and the competitor's rate plan.

### *To run the Price Comparison Administrative Report*

- 1 Navigate to the Product Comparison screen.
- 2 In the toolbar, click the Reports icon.
- 3 In the Reports dialog box, select EPC Administrative Report from the drop-down list.
- 4 Click Run Now.
- 5 In the EPC Admin Parameters dialog box, set the constraints for the report, if necessary.  
If you do not set constraints, the report includes all the data.
- 6 Click Finish.

The Report Viewer displays the report.

### *To run the Competitive Pricing report*

- 1 Navigate to the Product Comparison screen.
- 2 Click CP Report.

This begins the SmartScript session used with the Price Comparison feature. However, to run the report, you do not have to supply answers for Region, Supplier, or Rate Plans. If these questions are not answered, the report is generated for all regions, suppliers and rate plans.

- 3 At the end of the SmartScript session, click Finish.

Siebel Energy generates the report data as a background task. An email notification is sent to the user when the report has been generated.

## Accessing Price Comparisons (End User)

The Price Comparison feature can be made available through two applications:

- Siebel Energy allows end users, usually customer service representatives at a call center, to access the Price Comparison feature through the Opportunities screen.

This section describes the procedures that the customer service representatives would do to run the Price Comparison feature.

- Siebel eSales allows prospective or existing customers to access the Price Comparison feature over the Web.

For more information, see *Siebel eSales Administration Guide*.

## Generating a Price Comparison (End User)

End users can collect billing information for an existing service, such as gas or electricity. Siebel Energy converts this data into an annual cost, which it can then compare against internal rates.

### *To generate a price comparison for a customer*

- 1 Navigate to the Opportunities screen.
- 2 In the Opportunities list, select an existing record or add a new record and complete the necessary fields.

For more information about creating opportunities, see [Chapter 9, "Opportunities in Siebel Energy."](#)

- 3 Click the name of the new record.
- 4 Click the Price Comparison view tab.
- 5 In the Price Comparison list, click New.

Clicking New launches a SmartScript session with a series of questions to answer.



- 6 Click Next until you have answered all the questions, and then click Finish.  
Clicking Finish takes you back to the Price Comparison view in the Opportunities screen.  
Some fields are described in this table.

Field	Comments
Annual Savings	Displays the amount the customer could save by switching to your company's rate plan.
Attribute Values	Displays the attributes and values for the product.
Equivalent Rate	Indicates if the database found a like-for-like rate plan.
Projected Bill	Displays the annual cost calculated from the data provided.

## Enrolling a Customer for a Service in Siebel Energy (End User)

End users can enroll customers in a service offered by their company.

### *To enroll a customer for a service*

- 1 Navigate to the Opportunities screen.
- 2 In the Opportunities list, click the name of the opportunity.
- 3 Click the Price Comparison view tab.
- 4 In the Price Comparison list, select a price comparison or generate a new price comparison.

For instructions, see ["To generate a price comparison for a customer" on page 104](#).

- 5 Click Enroll.

For an existing customer, Siebel Energy creates an order. For a new customer, the CSR is given the option to create an account before the order is created.

For more information on the ordering process, see *Siebel Order Management Guide Addendum for Industry Applications*.



# 11 Billing in Siebel Energy

This chapter describes the procedures for handling customer inquiries about their invoices, usually performed by customer service representatives (CSRs). Using Siebel Energy, 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 Energy 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 Energy 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 Energy database tables, allowing CSRs to resolve them in real-time.

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

For instructions on setting up profiles that are used to run credit ratings, record billing preferences, or store tax exemption information, see ["Profiles in Siebel Energy" on page 35](#).

This chapter includes the following topics:

- ["Scenario for Billing in Siebel Energy" on page 108](#)
- ["Generating Credit, Fraud, and Usage Information in Siebel Energy" on page 110](#)
- ["Setting Up the Invoice Image Feature in Siebel Energy" on page 110](#)
- ["Accessing or Updating Billing Information in Siebel Energy \(End User\)" on page 111](#)
- ["Entering Payment Against an Outstanding Balance in Siebel Energy \(End User\)" on page 114](#)
- ["Viewing Usage Details in Siebel Energy \(End User\)" on page 117](#)
- ["Viewing Unbilled Charges in Siebel Energy \(End User\)" on page 117](#)
- ["Process of Creating Adjustments in Siebel Energy \(End User\)" on page 118](#)
- ["Process of Making Payment Arrangements in Siebel Energy \(End User\)" on page 120](#)
- ["Requesting a Duplicate Invoice in Siebel Energy \(End User\)" on page 123](#)
- ["Updating a Billing Profile in Siebel Energy \(End User\)" on page 123](#)
- ["Additional End-User Tasks for Billing Management" on page 124](#)

## Scenario for Billing in Siebel Energy

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 an energy provider receives a call from a business customer. The customer has just received his company's December invoice for electric service and believes that his company was overcharged for monthly usage.

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 CSR finds the December invoice at the top of the customer's invoice list. She brings up an image of the invoice and notices that the customer has been charged \$300 for off-peak demand.

The CSR wants to review the electric usage and demand history to confirm the company used this much power. She first retrieves the customer's usage information for the December billing period. She then analyzes the usage and informs the customer that a demand spike occurred on December 20. She also checks to see the other invoices for previous months to determine if this demand spike is consistent. It is not. The customer realizes that December 20 was the day of his company's holiday party and this was the cause of the excess usage.

The customer asks to check his usage for the current month to make sure there will not be unexpected surprises in the next month's invoice. The CSR reviews the unbilled charges and reports that there is no unusual usage.

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 Energy:

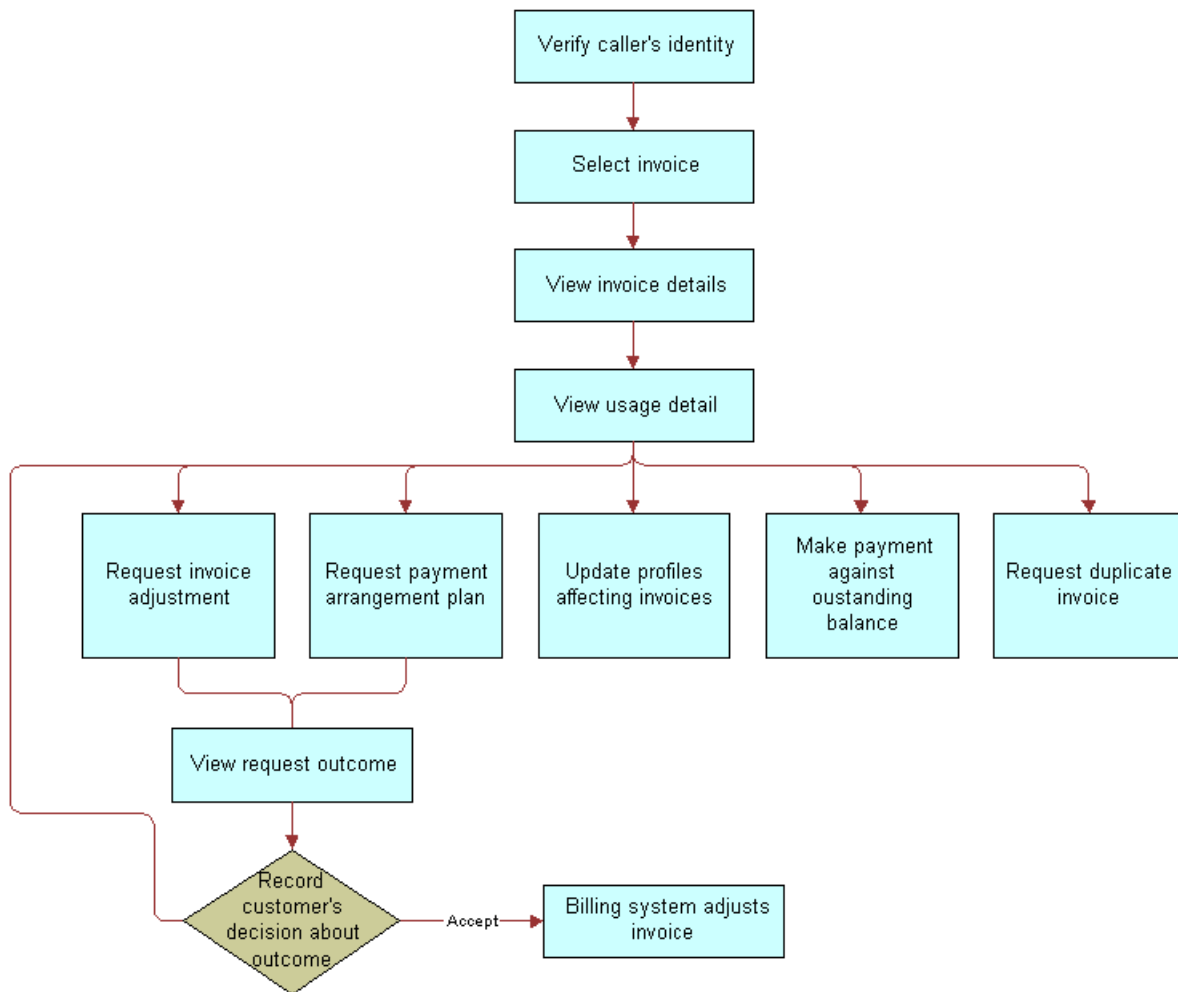


Figure 13. Example of Sequence for Billing

## Generating Credit, Fraud, and Usage Information in Siebel Energy

Siebel Energy 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 Energy 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.

**NOTE:** For Load Factor in the Usage view, you must enter the value as a percentage and *not* as a decimal value (multiply the value for used kWh or for available kWh by 100%). For example, if you would normally enter .50 as a load factor, enter 50. This makes sure that the data displays properly throughout Siebel Energy.

## Setting Up the Invoice Image Feature in Siebel Energy

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 <a href="#">Step 2</a> .
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 Energy (End User)

Siebel Energy 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 14 describes the information available in the Billing Portal view.

Table 14. 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.  <b>Pay button.</b> Takes end users to the Invoices screen, Payments view, where a payment has been created to settle the entire account balance.  <b>Refresh button.</b> Updates the information with the most current data.
Invoice History	Displays information from the Invoices screen. Information is read-only.  <b>Invoice # hyperlink.</b> Takes end users to the Invoices screen, Line Items view.
Payment History	Displays the payment history for the account. Information is read-only.  <b>Payment # hyperlink.</b> 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.  <b>Request # hyperlink.</b> Takes end users to the Adjustment Requests view, Line Items subview.
Additional Info	<b>Billing Profile hyperlink.</b> Takes end users to the Accounts screen, Profiles view, Billing Profile form.  <b>Usage Detail hyperlink.</b> Takes end users to the Accounts More Info form, Usage Detail view.  <b>Unbilled Charges hyperlink.</b> 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 Energy 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 Energy."](#)

### *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 service ID in the Service 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 Energy" on page 110](#).

### *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 Energy (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 115](#), 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 14 on page 112](#).
- 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 Energy (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 Energy (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 14 on page 112](#).

### *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.
NonRecurring Charge	Current period's nonrecurring charges.

Field	Comments
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 Energy (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 118](#)
- 2 ["Viewing an Adjustment Request Outcome" on page 119](#)
- 3 ["Recording a Customer's Decision About Adjustment Outcome Terms" on page 120](#)

For more information about integrating the billing component with an external billing system, see [Chapter 16, "Defining Integration Workflows for Siebel Energy."](#)

### 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 Energy \(End User\)" on page 118](#).

**NOTE:** End users can also begin this procedure from the Billing Portal view. For information, see [Table 14 on page 112](#).

#### *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 Energy 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 Energy.

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 Energy \(End User\)”](#) on page 118.

### ***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 Energy \(End User\)"](#) on page 118.

### *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 Energy (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 arrangement, perform the following tasks:

- 1 ["Requesting a Payment Arrangement \(End User\)"](#) on page 121
- 2 ["Viewing the Outcome of a Payment Arrangement Request \(End User\)"](#) on page 121
- 3 ["Recording a Customer's Decision About Payment Arrangement Terms \(End User\)"](#) on page 122



For more information about integrating the billing component with an external billing system, see [Chapter 16, “Defining Integration Workflows for Siebel Energy.”](#)

## 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 Energy \(End User\)”](#) on [page 120](#).

### *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 Energy receives the outcome of the request, which is generated by the external billing system.

This task is a step in [“Process of Making Payment Arrangements in Siebel Energy \(End User\)”](#) on [page 120](#).

### *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 Energy \(End User\)](#)" on [page 120](#).

#### ***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 Energy (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 Energy (End User)

When billing a customer, Siebel Energy 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 Energy."](#)

# 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 *Siebel Applications Administration Guide*.

# 12 Work Orders in Siebel Energy

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

This chapter includes the following topics:

- [“Scenario for Work Orders in Siebel Energy”](#)
- [“Creating a Work Order in Siebel Energy \(End User\)” on page 126](#)
- [“Adding an Activity to a Work Order in Siebel Energy \(End User\)” on page 127](#)
- [“Creating Work Order Line Items in Siebel Energy \(End User\)” on page 127](#)
- [“Adding Work Order Terms in Siebel Energy \(End User\)” on page 128](#)
- [“Additional End-User Tasks for Work Order Management in Siebel Energy” on page 129](#)

## Scenario for Work Orders in Siebel Energy

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) for an energy service provider takes an order for a new small commercial customer, requiring electric service, gas service, and a facility submetering service. The order created by the CSR includes three line items, one for each service. The CSR provides a quote to the customer, who accepts it and asks that the order be placed.

In the Order Summary view, the CSR submits the order to the back-office systems. The energy service provider must notify the distribution companies for electric and gas services, so submitting the order creates work orders for these services. In this case, the order is separated into three separate work orders, which are then submitted to the various providers for activation:

- Electric service—provided by the electric distribution company
- Gas service—provided by the gas distribution company
- Submetering service—provided by an outsource partner

The customer calls back a week later to see if her account has been switched over. A different CSR takes the call and is able to search the account to find any open orders. When the CSR finds the appropriate order, he drills into the hyperlink to find the work orders associated with the order. Although the electric and gas services have been switched, he sees that the submetering work order is still open due to a backlog in the appropriate meters. From the associated notes and activities, he is able to tell the customer that the new submetering service should be installed within the next three days.

Figure 14 shows the sequence of procedures that an end user might follow to manage work orders.

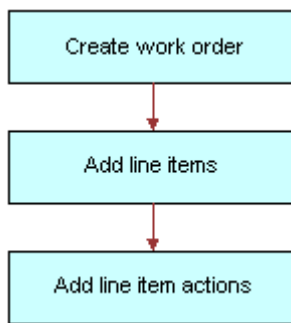


Figure 14. Example of Sequence for Work Orders

## Creating a Work Order in Siebel Energy (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.

Field	Comments
Last Name	Contact for the order.
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 Energy (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 Energy (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 Energy (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 Energy

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 *Siebel Fundamentals*.



# 13 Service Requests and Trouble Tickets in Siebel Energy

Siebel Energy 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

This chapter includes the following topics:

- [“About Service Requests and Trouble Tickets in Siebel Energy”](#)
- [“Scenario for Service Requests and Trouble Tickets in Siebel Energy” on page 132](#)
- [“Setting up Service Requests and Trouble Tickets in Siebel Energy” on page 134](#)
- [“Creating a Trouble Ticket Record in Siebel Energy \(End User\)” on page 135](#)
- [“Assigning a Trouble Ticket in Siebel Energy \(End User\)” on page 135](#)
- [“Associating Parent and Child Trouble Tickets in Siebel Energy \(End User\)” on page 136](#)
- [“About Trouble Ticket Solutions” on page 137](#)
- [“Resolving Trouble Tickets in Siebel Energy \(End User\)” on page 137](#)
- [“Using the Customer Satisfaction Survey in Siebel Energy \(End User\)” on page 138](#)
- [“Analyzing Trouble Tickets Data in Siebel Energy \(End User\)” on page 139](#)
- [“Additional End-User Tasks for Trouble Ticket Management in Siebel Energy” on page 139](#)

## About Service Requests and Trouble Tickets in Siebel Energy

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 outage management system that is integrated with Siebel Energy automatically creates a trouble ticket record in the Siebel Energy 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 Energy or moved into Siebel Energy 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 outage management systems that are integrated with Siebel Energy

## Trouble Ticket Referral

Trouble tickets can be referred from Siebel Energy to trading partner software through integration with an electronic bonding gateway, using Siebel Enterprise 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 *Siebel Applications Administration Guide*.

# Scenario for Service Requests and Trouble Tickets in Siebel Energy

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.

During a typical day in a customer service organization, a group of Customer Service Representatives (CSRs) respond to customer phone calls and assign thirty trouble tickets. Twenty of the trouble tickets are solved using existing solutions, which the CSRs associate with the trouble tickets. Ten of the trouble tickets require new solutions, which the CSRs create after performing the necessary research. Between them, the CSRs make two mistakes when they click the wrong part of the user interface during an operation. They note their mistakes in email messages to the manager and ask the manager to correct them.

At the end of the day, the manager performs routine administrative work on the solutions that were created during the day, starting with correcting the two errors. In one error, a CSR accidentally associated a solution with the wrong product defect; the manager corrects this by dissociating them. A different CSR incorrectly associated a solution with a resolution document; the manager resolves the problem by dissociating them.

Next, the manager reviews each of the new solutions in turn. She performs a query for the solutions that were created during the day and examines the first record. She checks that it is associated with a trouble ticket and then reads the solution. Being familiar with this type of problem, the manager recalls a similar solution that may be useful for a CSR to know about. She locates the similar solution and associates the two records.

The manager also recalls a technical document on the company's network that might help to explain the problem. She locates the document, creates a new resolution document record, attaches the document to the record, and associates the record with the solution. She is now satisfied with the solution, so she changes its status to Final and makes sure that it is only visible internally.

The manager reviews the second solution and checks that it is associated with a trouble ticket. This solution is incomplete so the manager leaves the status as Draft. She informs the CSR who created the solution that this problem is related to, and should be associated with, a known product defect, and asks the CSR to research it more thoroughly.

The manager checks that the third solution is associated with a trouble ticket and reads the resolution documents associated with it. One of the resolution documents is an internal technical document that was recently revised and should be replaced. The manager dissociates the solution from the document, locates the revised version on the network, adds it to the database, and associates it with the solution. She then changes the status of the solution to Final.

The manager reviews each of the remaining newly created solutions in a similar manner.

Figure 15 shows the sequence of procedures that end users might follow to manage trouble tickets.

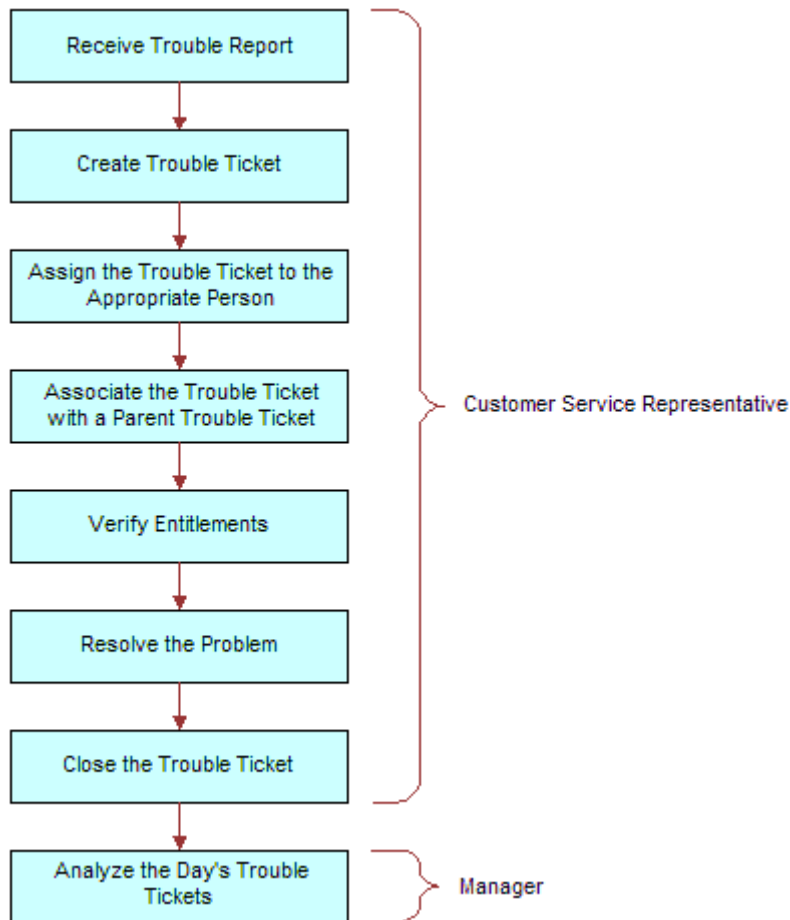


Figure 15. Example of Sequence for Trouble Tickets

## Setting up Service Requests and Trouble Tickets in Siebel Energy

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 Energy (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 Energy (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 Energy (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 Energy 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 Energy, the term *solution* specifically means a record in the Siebel Energy 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 Energy (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 *Siebel 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 Energy (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 *Siebel 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 Energy (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 Energy

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 Energy,"](#) and [Chapter 5, "Contacts in Siebel Energy."](#)

## 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 Energy."](#)

## Communication with Field Service Agents

End users may need to contact a field service agent. Siebel Energy 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 *Siebel Fundamentals*.

# 14 Credit Management in Siebel Energy

Credit management functionality frequently resides in third-party back-office credit systems. Siebel Enterprise Application Integration (eAI), which is part of Siebel Energy, 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 Energy can interpret late payment or nonpayment messages that the credit system generates.

As a basis for credit management, Siebel Energy provides information in the form of credit alerts. A *credit alert* is a Siebel Energy 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.

This chapter includes the following topics:

- [“About Credit Management in Siebel Energy”](#)
- [“Scenario for Credit Management in Siebel Energy” on page 142](#)
- [“Reviewing and Adding a Credit Alert in Siebel Energy \(End User\)” on page 144](#)
- [“Adding an Activity to a Credit Alert in Siebel Energy \(End User\)” on page 146](#)
- [“Contacting the Customer About a Credit Alert \(End User\)” on page 146](#)
- [“Entering Payment Information in Siebel Energy \(End User\)” on page 146](#)
- [“Process of Creating Account Adjustments or Payment Plans in Siebel Energy \(End User\)” on page 147](#)
- [“Closing a Credit Alert in Siebel Energy \(End User\)” on page 151](#)
- [“Additional End-User Tasks for Credit Management in Siebel Energy” on page 151](#)

## About Credit Management in Siebel Energy

Siebel Energy 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 Energy 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 Energy" on page 43](#).
- **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 Energy

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 electrical services for its offices. The owner usually pays the bill on time. However, the latest bill for electrical 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 Energy. The message causes Siebel Energy to create a credit alert.

Siebel Energy 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 Energy 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 Energy, sets the credit alert's Status to Pending, and records the details of the conversation in the Comments field.

Siebel Energy 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.

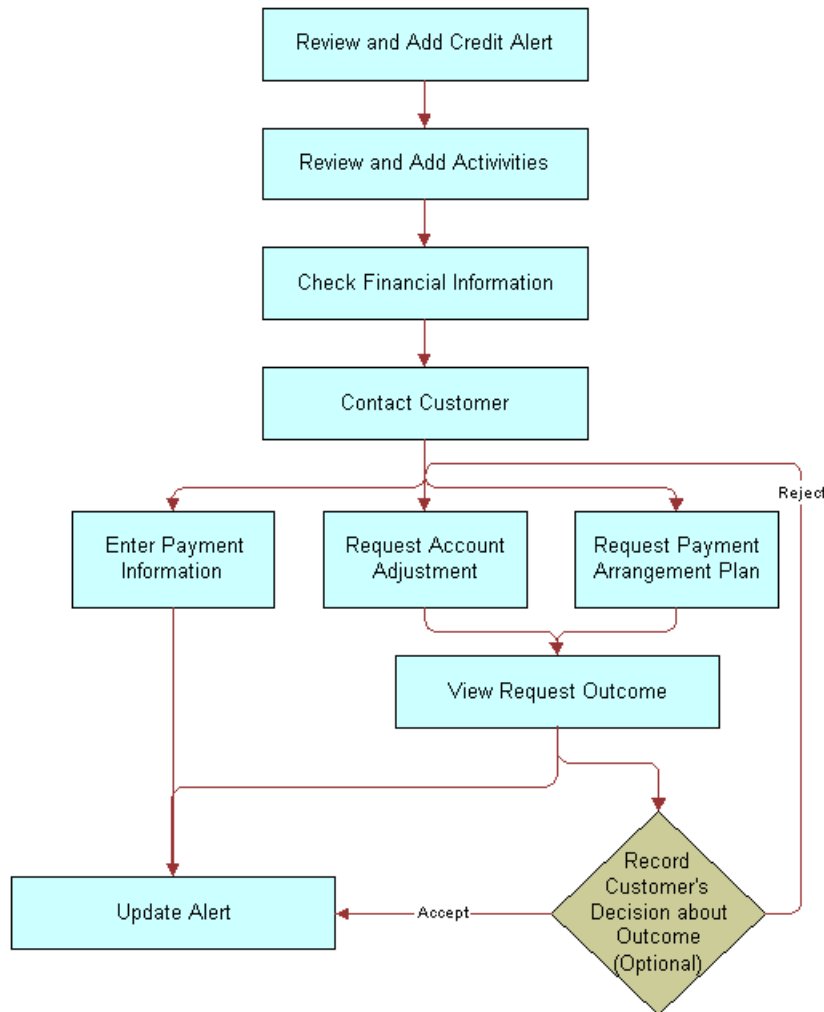


Figure 16. Example of Sequence for Credit Management

## Reviewing and Adding a Credit Alert in Siebel Energy (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 Energy 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 11, "Billing in Siebel Energy."](#)

**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 Energy. 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 Energy.
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 Energy (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 Energy (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 Energy \(End User\)”](#) on page 114.

## Process of Creating Account Adjustments or Payment Plans in Siebel Energy (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 Energy 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 Energy.

**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 148
- 2 [“Viewing Account Adjustment or Payment Plan Request Outcomes \(End User\)”](#) on page 149
- 3 [“Recording Customer Decisions About Account Adjustments or Payment Plans \(End User\)”](#) on page 150

## 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 Energy \(End User\)”](#) on page 147.

### *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 Energy.

This task is a step in [“Process of Creating Account Adjustments or Payment Plans in Siebel Energy \(End User\)”](#) on page 147.

### *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 Energy \(End User\)"](#) on page 147.

### *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 Energy.
- 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 Energy.
- 5 If the customer rejects the outcome, discuss the options again and submit another request.

## Closing a Credit Alert in Siebel Energy (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 Energy

For descriptions of other, more general procedures related to credit management, see *Siebel Field Service Guide* and *Siebel 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 Energy”](#) on page 43.



# 15 Fraud Management in Siebel Energy

*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:

- Illegal tapping of utility service points
- 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 usage patterns that may indicate fraud.

Traditionally, companies have used legacy fraud management systems to identify and manage fraud.

This chapter includes the following topics:

- [“About Fraud Management in Siebel Energy”](#)
- [“Scenario for Fraud Management in Siebel Energy \(End User\)” on page 154](#)
- [“Viewing Fraud Alerts in Siebel Energy \(End User\)” on page 155](#)
- [“Following Up with the Customer about a Fraud Alert \(End User\)” on page 156](#)
- [“Changing Fraud Thresholds in Siebel Energy \(End User\)” on page 157](#)
- [“Updating the Fraud Alert in Siebel Energy \(End User\)” on page 157](#)
- [“Additional End-User Tasks for Fraud Management in Siebel Energy” on page 157](#)

## About Fraud Management in Siebel Energy

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 usage details.

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.

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 Energy functions as the front-office application for managing fraud. Your company’s back-office fraud management systems send fraud lists to Siebel Energy for follow-up. Customer service representatives (CSRs) go through the lists and contact the customers to check if they used the services 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.

To help you resolve cases of suspected or obvious fraud, Siebel Energy 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 Energy (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 your residential customers. A customer has a contract for residential electric and gas services.

Your fraud management system finds that the meter readings at the customer's location show typical gas usage but no electricity usage. Such a pattern may mean a problem with the electric meter, a theft of energy, or a gas leak in an unoccupied residence. The fraud management system generates a fraud alert for the customer's account, with the fraud level set to Suspected, fraud type set to Theft, and fraud event set to No Electric Usage. The fraud message is forwarded to Siebel Energy. 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 Energy 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 examines the fraud alert. The CSR also checks for any other fraud alerts raised against the account in the last 12 months to see if it has a history of fraud. This turns out to be the first fraud alert against the account.

The CSR looks up contact information for the customer's account in Siebel Energy and telephones the customer, intending to ask if the premises are occupied. The person who answers the phone is hesitant and claims that the premises are "infrequently" occupied. The CSR suspects that this is a case of electricity theft. The CSR updates the fraud alert's status and attaches appropriate comments.

Siebel Energy transmits this information to the fraud management system. The CSR's fraud management department then starts its formal investigation and dispatches a field service agent to the premise location.

Figure 17 shows a possible sequence for managing fraud.

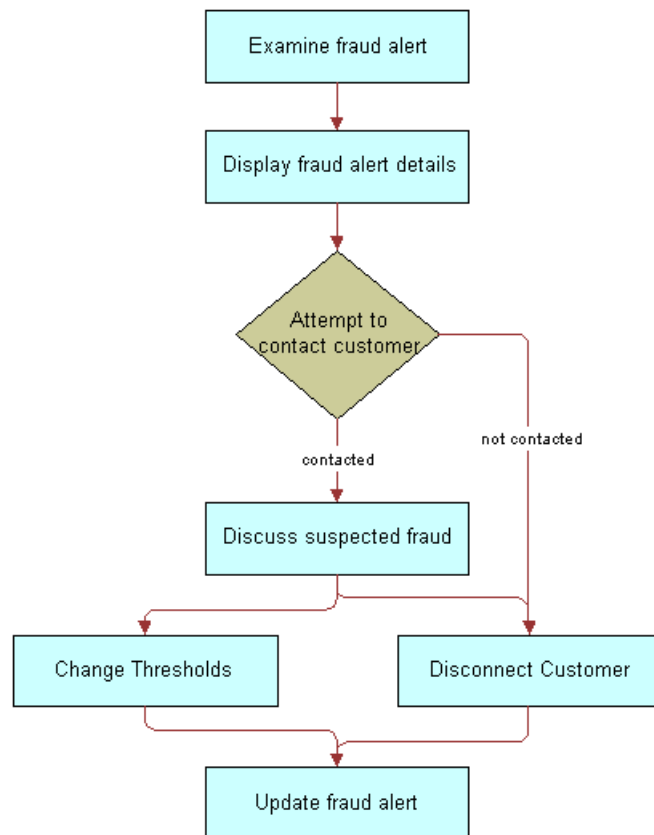


Figure 17. Example of Sequence for Fraud Management

## Viewing Fraud Alerts in Siebel Energy (End User)

When a back-office application flags an account for fraud, Siebel Energy 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 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 Energy 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 Energy (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 Energy."](#)

## Updating the Fraud Alert in Siebel Energy (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 Energy

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 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*.

# 16 Defining Integration Workflows for Siebel Energy

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 Energy 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 Energy, 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 Energy and other applications manually. To automate the integration between Siebel Energy and other applications manually, you normally use both Siebel Business Process Designer and Siebel Enterprise Application Integration (eAI).
- **UAN integration.** Oracle's 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 Energy 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 Framework: Workflow 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.

This chapter includes the following topics:

- ["Terminology for Integration Workflows in Siebel Energy" on page 160](#)
- ["Scenarios for Defining Integration Workflow in Siebel Energy" on page 160](#)

- [“Sample Integration Workflows for Siebel Energy” on page 164](#)
- [“Sample Integration Workflow: CUT Send Account Data” on page 173](#)
- [“Sample Integration Workflow: CUT Receive Account Data” on page 174](#)

## Terminology for Integration Workflows in Siebel Energy

This section describes some terms used in this chapter in the context of workflow processes.

**Siebel eAI.** Siebel Enterprise 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 Energy 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 Business 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 Energy. 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 Energy 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 Energy

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 Energy. 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 Energy 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 Energy, 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 Energy.

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 Energy. 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 Energy 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 Energy, 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 Energy.

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 Energy. 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 Energy 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 Energy, 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 Energy.

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 Energy 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 Energy, 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 Energy.

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 Energy 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 Energy 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 Energy. 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 Energy 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 Energy 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 Energy using the CUT Receive Fraud Alert Data workflow process. Updates to fraud alert information stored in the back-office system are communicated to Siebel Energy 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 Energy using the CUT Receive Credit Alert Data workflow process. Updates to credit alert information stored in the back-office system are communicated to Siebel Energy 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 Energy, 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 Energy

End users create or modify a phone number in an external application, and the phone number data is synchronized with Siebel Energy 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 Energy 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 Energy

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 Framework: Workflow 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 15 on page 165](#)).

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 15 shows the steps for the CUT Send Account Data workflow process.

Table 15. 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 16 shows the steps for the CUT Get Account Data workflow subprocess.

Table 16. 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 17 shows the steps for the CUT Receive Account Data workflow process.

Table 17. 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 18 shows the steps for the CUT Send Service Profile Data workflow process.

Table 18. 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 19 shows the steps for the CUT Get Service Profile Data workflow subprocess.

Table 19. 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 19. 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 20 shows the steps for the CUT Receive Service Profile Data workflow process.

Table 20. 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 21 shows the steps for the CUT Get Sales Order Data workflow process.

Table 21. 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 22 shows the steps for the CUT Send Sales Order Data workflow process.

Table 22. 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 23 shows the steps for the CUT Receive Sales Order Data workflow process.

Table 23. 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 24 shows the steps for the CUT Get Work Order Data workflow process.

Table 24. 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 24. 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 25 shows the steps for the CUT Send Work Order Data workflow process.

Table 25. 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 26 shows the steps for the CUT Receive Work Order Data workflow process.

Table 26. 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 27 shows the steps for the CUT Get Trouble Ticket Data workflow process.

Table 27. 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 28 shows the steps for the CUT Send Trouble Ticket Data workflow process.

Table 28. 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 29 shows the steps for the CUT Receive Trouble Ticket Data workflow process.

Table 29. 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 29. 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 30 shows the steps for the CUT Receive Fraud Alert Data workflow process.

Table 30. 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 31 shows the steps for the CUT Receive Credit Alert Data workflow process.

Table 31. 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 32 shows the steps for the CUT Get Phone Number Data workflow process.

Table 32. 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 33 shows the steps for the CUT Send Phone Number Data workflow process.

Table 33. 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 34 shows the steps for the CUT Receive Phone Number Data workflow process.

Table 34. 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 34. 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](#).

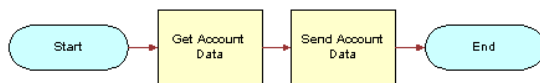


Figure 18. CUT Send Account Data Workflow

### 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](#).

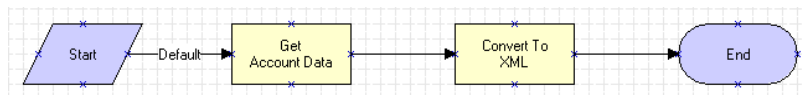


Figure 19. CUT Get Account Data Subprocess Workflow

### 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.

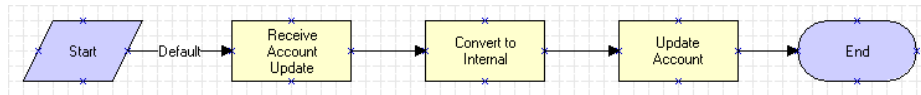


Figure 20. CUT Receive Account Data Workflow Process

## 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 Business applications.

The CUT Receive Account Data workflow process has these additional properties:

- **Account Message.** Contains the object in its Siebel Energy hierarchical format when converted. It must be in this format before it can be inserted or updated in Siebel Energy.
- **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.



# 17 Oil Well Management

This chapter describes Siebel Energy's capabilities for managing wells. It includes the following topics:

- "About Oil Well Management" on page 177
- "Scenario for Oil Well Management" on page 178
- "Setting Up Products for Oil Well Management" on page 179
- "Fields of the Well List" on page 181
- "Adding New Leases" on page 182
- "Adding New Wells and Equipment" on page 183
- "Adding or Modifying a Well Address" on page 184
- "Creating Preventive Maintenance Plans for Oil Wells" on page 185
- "Creating Well Service Jobs (End User)" on page 185
- "Dispatching and Performing Well Service Jobs (End User)" on page 187
- "Working with Partners on Oil Well Management" on page 188

## About Oil Well Management

Oil field service companies provide services for oil and gas companies at the well site.

The Siebel Well Management module allows oil field service companies to do the following:

- Oil field service administrators can enter and manage information about customer leases, wells, and equipment.
- Dispatchers can initiate new jobs and can schedule, and dispatch field workers to perform those jobs.
- Field workers who are performing jobs can track their schedules and equipment and generate invoices.
- Salespeople can use the information about customers leases, wells, and equipment to develop new jobs and to retain customers.

This chapter covers only the setup tasks that are specific to Siebel's Well Management module. In addition, you must perform the following tasks that are common to many Siebel applications:

- **Set up accounts and employees.** You must enter information about your customer accounts and the contacts at those accounts. You must also enter information about your employees and give your employees access to the Siebel application. For more information, see *Siebel Applications Administration Guide*.

- **Set up partners.** If your field service employees work with field service employees of partner companies, you must set up the partner portal and give the partner company access to it. For more information, see *Siebel Partner Relationship Management Administration Guide* and *Siebel Partner Relationship Management Administration Guide Addendum for Industry Applications*.
- **Set up activities.** You must create activities and activity templates (lists of multiple activities) that represent the actions that field service personnel perform during jobs. When the dispatcher creates a new job, the dispatcher assigns these activities to the field service personnel. For more information about setting up activities, see the section about field service activities in *Siebel Field Service Guide*.

Many tasks for oil well management are the same as tasks for other types of field service. These tasks are covered in *Siebel Field Service Guide*.

## Scenario for Oil Well Management

A field administrator at an oil field service company receives a phone call from a customer, who requests an oil field service, such as a water haul. The administrator first looks up the information about the well that the service will be performed on. If the company has never performed work on that particular well, the administrator must set up the new well before proceeding.

For an existing well, the administrator locates the correct well in the Wells screen using fields such as the Account, County, API#, and Owner Well #. Once the well is located, the administrator creates a service request for the well. The Type, Area, and Subarea fields on the service request are used to capture information such as the line of business and service type.

After creating the Service Request header, the administrator selects an Activity Plan, which generates the specific work tickets or activities necessary to perform the work, which will be given to the dispatcher and field engineer. The work tickets include the skills required, recommended equipment and parts, and steps to complete the work.

Some more complex jobs, such as wireline or workover jobs, may also require order and order line item information to be captured. In this case, an Order is created from the service request. Order line items can then be captured.

The dispatcher receives the work tickets in the unscheduled activities queue on the Dispatch Board. As work tickets arrive, the dispatcher schedules the work tickets for the proper day and time to an available field engineer. The dispatcher may use the Assignment Score button on the dispatch board to evaluate the best skilled resources for a particular work ticket.

The field engineer performing jobs may use a mobile laptop or handheld computer. In either case, the engineer syncs the device before heading out from the field office for the day, which transfers all the engineer's activities for that day to the device. The engineer can view these activities using the My Activities view of the Activities screen. During the day, the field engineer will sync periodically to receive new work tickets and update the status of existing work tickets.

The field engineer uses the Activity screen to manage work tickets. When starting a new work ticket, the engineer changes the status to *Enroute* and travels to the site. To start the job, the engineer changes the status to *In Progress*, and clicks Start on the Time Tracker. While performing the job, the engineer may review information on the work ticket, such as steps, recommended equipment, and well information. After the job, the engineer may use the Time Tracker view of the work ticket to close out the time for the job, and then use the Auto-Invoice button on the Invoice view to generate an invoice for customer review and approval.

## Setting Up Products for Oil Well Management

Before oil field service administrators can use Well Management to enter information about customers, the Siebel administrator must create products representing wells, leases, and well equipment.

You must set up these products in advance, in order to allow oil field service administrators to enter information about specific customers' leases, wells, and equipment.

For more information about setting up products, see *Siebel Product Administration Guide*.

### Setting Up Wells as Products

The Wells Screen displays Products that have the value *Well* selected in the Type field.

The Siebel administrator must use the Administration - Product screen to create products with the type of Well. Then, when administrators create a new record in the Wells screen, they will be able to choose these products in the Completion Type/Product field of the Well record.

It is recommended that you create a product with the type of Well for each completion type. Examples of completion types are:

- **Oil well.** Used to produce oil.
- **Gas well.** Used to produce natural gas.
- **Injection well.** Used to inject either gas (such as nitrogen) or water, in order to stimulate production of natural gas or oil.
- **Disposal wells.** Used to dispose of water that is produced with oil.

The completion types you use may differ, depending on your business model.

#### *To set up wells as products*

- 1 Navigate to the Administration - Product screen.
- 2 Create a new product, as described in *Siebel Product Administration Guide*.
  - a In the Name field, enter a completion type.  
For example, enter Oil Well or Gas Well.
  - b In the Type field, select *Well*.

- c If readings are to be captured on this well, click the More Info view tab, click the Product Measurements link, and click New to associate a measurement type with the well.
- 3 Repeat [Step 2](#) to create one product record for each completion type.

## Setting Up Leases as Products

A lease typically consists of many wells and the production facilities for these wells. Each lease typically has a set of designated field personnel, including pumpers and a superintendent.

It is recommended that you create a lease by creating a product with the name of *Lease* and the type of *Well*. If you do this, oil field services administrators will be able to enter information about new leases in the Wells screen and will be able to attach wells to these leases, as described in [“Adding New Wells and Equipment” on page 183](#). Then end users will be able to use the Wells Explorer to view a hierarchy showing the wells for each lease.

**NOTE:** It is also possible to create a different hierarchy. For example, you can choose to organize leases by field. To do this, you can add a product with the name *Field* and the type *Well*, and the administrator can attach fields to leases in addition to attaching wells to fields. Then end users will be able to view a three-level hierarchy of fields, the leases in each field, and the wells in each field.

### *To set up leases as products*

- 1 Navigate to the Administration - Product screen.
- 2 Create a new product, as described in *Siebel Product Administration Guide*.
  - a In the Name field, enter *Lease*.
  - b In the Type field, select *Well*.

## Setting Up Equipment as Products

It is recommended that you use the same approach to define well equipment as products. For each type of equipment, create a product with the type of *Well*.

You can create a record for each type of equipment used by your customers that you need to track. This includes surface equipment, such as artificial lifts, tank batteries, and separators, and subsurface equipment and components of the well itself, such as casings, tubing, and the wellhead.

It is recommended that you define most types of equipment as customizable products. Most items of oil field equipment and components have components and attributes that should be recorded. For example, your company may find it useful to capture information about each well casing, such as the casing's Cement Sx or Casing Grade.

You can define customizable products for the different type of oil field equipment and define the appropriate attributes and components for each piece of equipment. Then the oil field service administrators will be able to click the Customize button to specify the attributes or components of the equipment at well sites, as described in [“Adding New Wells and Equipment” on page 183](#). After you have set it up in this way, the attributes for a well or equipment can be viewed in the Attributes view.

**To set up equipment as products**

- 1 Navigate to the Administration - Product screen.
- 2 Create a new product, as described in *Siebel Product Administration Guide*.
  - a In the Name field, enter the name of a type of equipment.  
For example, enter *Artificial Lift* or *Casing*.
  - b In the Type field, select *Well*.
  - c If appropriate, set up classes and specify the attributes or components of the product.
- 3 Repeat [Step 2](#) to create one product record for each type of equipment that your customers use.

## Fields of the Well List

The oil field service administrator records information about customers' leases, wells, and equipment in the Wells screen, using the same fields of the Well list and More Info form for all this information. Some of these fields are described in [Table 35](#).

For specifics about entering different types of information in these fields, see ["Adding New Leases" on page 182](#) and ["Adding New Wells and Equipment" on page 183](#).

Table 35. Fields for Leases, Wells, and Equipment for Oil Well Management

Field	Comments
Asset/Well #	Displays an identifying number for the well or asset. Automatically generated.
Asset/Well Name	Enter a name for the well or asset.
Owner Well Number	Enter the well number assigned by the owner or operator of the well.
API Number	Enter the well number assigned by the American Petroleum Institute.
Lease/Parent Name	Displays the name of the parent asset. Leases are parents of wells and wells are parents of equipment. The value in this field is based on the well you attach to a lease and on the equipment you attach to a well, as described in <a href="#">"Adding New Wells and Equipment" on page 183</a> .
Completion Type/Product	Select the type of product that this asset is. You can select Lease, a type of well (such as Oil Well or Disposal Well) or a type of equipment (such as Artificial List or Casing). The values that are available here depend on the products that the Siebel administrator creates, as described in <a href="#">"Setting Up Products for Oil Well Management" on page 179</a> .
Owner	Select the company that owns the well.
Operator	Select the company that operates the well.

Table 35. Fields for Leases, Wells, and Equipment for Oil Well Management

Field	Comments
Original Cost	Enter the initial cost of the well or equipment.
Status	Select the status for the well. Options include active, unavailable, in transit, reserved.
Operating Status	Select the operating status of the well. Options include Producing, Shut-in, Plugged, Drilling, Injection, Abandoned, Workover.
Registered	Enter the date that the equipment or well is registered.
Depth	Enter the depth of the well (the total depth drilled by the drill bit).
Elevation	Enter the well elevation at the surface of the well.
Footage/Mileage	Enter the footage and mileage. Footage is the distance in feet to the edge of the section, with the section edge (such as North) identified. Mileage is the distance in miles and the direction to the nearest city.
Township	Enter the township. A township is a survey unit, normally a quadrangle with approximately six miles on each side.
Range	Enter the range. A range is a group of sections within a township.
Section	Enter the section. A section is a subdivision of a township, normally a quadrangle with one mile on each side.
Quarter Section	Enter the Quarter Section. A quarter section is a quarter of a section.
PBTD	Enter the plug back total depth. PBTD is the depth of the well to the cement plug placed at the bottom of the producing zone. It is less than the total depth of the well.
ID	Enter the inside diameter of the well.
OD	Enter the outside diameter of the well.

## Adding New Leases

The oil field services administrator uses the well screen to set up leases, wells, and equipment. Each lease contains multiple wells.

When you have a new customer or when an existing customer calls with work on a lease that the oil field services company has not worked on before, the oil field service administrator works with the customer to enter information about the lease.

You should enter information about leases before you enter information about the wells and equipment at that lease.

### *To add a new lease*

- 1 Navigate to the Wells screen.
- 2 Add a new record to the Well list.

- 3 In the Completion Type/Product field, select Lease.
- 4 Complete the other necessary fields in the Well list and the More Info form, as described in [“Fields of the Well List” on page 181](#).

## Adding New Wells and Equipment

The oil field services administrator uses the Well screen to enter information about new wells and equipment.

When a customer calls with work on a well that the oil field services company has not worked on before, the oil field services administrator works with the customer to enter necessary information about the well and about the equipment at that well.

After this information is entered, employees of the oil field services company can use the Wells Explorer to view this information hierarchically. You can view the wells at each lease and the equipment at each well. The oil field services administrator is responsible for maintaining this hierarchy.

For more information about installing assets and setting up asset hierarchies, see the section about assets in *Siebel Field Service Guide*.

Before you add a new well, the lease for the well should be entered in the Well list. In most cases, the new well is at a lease where you are already working on other wells, so you do not have to add the lease. However, if this is a new lease as well as a new well, you must add the lease, as described in [“Adding New Leases” on page 182](#).

### Adding New Wells

First, add information about the new well.

#### *To add a new well*

- 1 Navigate to the Wells screen.
- 2 Add a new record to the Well list.
- 3 In the Completion Type/Product field, select the type of well that this is.  
For example, you might select *Oil Well*, *Gas Well*, or *Disposal Well*.
- 4 Complete the other necessary fields in the Well list and the More Info form, as described in [“Fields of the Well List” on page 181](#).

### Attaching Wells to Leases

To allow employees to use the Wells Explorer to view leases and wells hierarchically, you must attach the well to a lease. Then the well will appear under this lease in the Explorer’s hierarchy and in the Components view.

### *To attach a well to a lease*

- 1 In the Well list, use a query to find the appropriate lease.
- 2 Click the Transactions view tab.
- 3 In the Transactions list, add a new record.
- 4 In the Asset/Well # field, click the select button, and use the dialog box to select the appropriate well.

## **Adding New Equipment**

Add information about all the equipment at the new well that is relevant to the services you provide to this customer.

### *To add new equipment*

- 1 Add a new record to the Well list.
- 2 In the Completion Type/Product field, select the type of equipment that this is.  
For example, you might select *Artificial Lift* or *Casing*.
- 3 Complete the other necessary fields in the Well list and the More Info form, as described in [“Fields of the Well List” on page 181](#).
- 4 If this equipment has components or attributes, click Customize to specify more information about the equipment.

## **Attaching Equipment to Wells**

To allow employees to use the Wells Explorer to view wells and equipment hierarchically, you must attach the equipment to a well. Then the equipment will appear under this well in the Explorer’s hierarchy.

### *To attach equipment to a well*

- 1 In the Well list, use a query to find the appropriate well.
- 2 Click the Transactions view tab.
- 3 In the Transactions list, add a new record.
- 4 In the Asset/Well # field, click the select button, and use the dialog box to select the appropriate equipment.

Add all the equipment for this well.

## **Adding or Modifying a Well Address**

When you create a new well, you enter the well address, including its county, state, latitude, longitude, and directions to the well.



To enter this address or to modify it, you must click the select button in the County field for the well to display the Pick Well Address dialog box. Well address fields can only be entered or modified in this dialog box. Elsewhere, they are read-only.

#### ***To add or modify a well address***

- 1 Navigate to the Wells screen.
- 2 In the Well list, in the Well County field of the well whose address you are entering, click the select button.
- 3 In the Pick Well Address dialog box, add or modify information about the wells county, state, latitude, longitude, and directions to the well, and click Close.

## **Creating Preventive Maintenance Plans for Oil Wells**

A yard manager may work with a customer to set up preventive maintenance plans for their wells using the Preventive Maintenance view of the Wells screen, so that oil field service activities such as salt water hauls can be scheduled at periodic intervals.

After you set up a preventive maintenance plan, service requests and activities will be generated automatically when it is time for your employees to perform preventive maintenance services.

To create a preventive maintenance plan for a well, you must:

- Set up the preventive maintenance plan. One plan can be used for one or more wells.
- Associate the preventive maintenance plan with the well.

For more information about setting up preventive maintenance plans, see the section about preventive maintenance in *Siebel Field Service Guide*.

#### ***To associate a preventive maintenance plan with a well***

- 1 Navigate to the Wells screen.
- 2 In the Well list, click the Asset/Well # field of the well you want to associate the plan with.
- 3 Click the Preventive Maintenance view tab.
- 4 In the Preventive Maintenance view, in the link bar, click Plans.
- 5 In the Plans list, add a new record and select the preventive maintenance plan for this well.

## **Creating Well Service Jobs (End User)**

When a customer calls with a new job for a well, a dispatcher creates a new service request record representing the job and new Order record, representing the work ticket. Depending on your business model, you may create one or both of these records.

The job and work ticket both include information about the well to work on. Line items are added to the work ticket for items such as the equipment used for the job (trucks, rigs, and so on) and rentals such as tools or frac tanks. These line items link back to the various equipment assets and employees, so that the yard manager can easily see which jobs and work tickets have been performed by a particular piece of equipment or crew.

For more information about creating service requests, see *Siebel Field Service Guide*.

For more information about creating orders, see *Siebel Field Service Guide* and *Siebel Order Management Guide*.

### **To create a well service job**

- 1** Navigate to the Wells screen.
- 2** In the Well list, select the well that the work will be done on.
- 3** Create the service request representing the job:
  - a** Click the Service Request view tab.
  - b** Add a new Service Request record and complete the necessary fields.
  - c** Click the SR# field of the new service request.  
The Service Request screen appears.
  - d** In the Service Request screen, fill out additional details of the Service Request, as necessary.
- 4** Create the activities for the service request:
  - a** Click the Activity Plan view tab.
  - b** In the Activity Plan view, click New.
  - c** Choose an activity plan template.
  - d** Click the Activity view tab to see the new activities.
  - e** To immediately dispatch this activity, click the hyperlink on the activity status to go to the dispatch board and schedule the activity.
- 5** If necessary, create the Order representing the work ticket:
  - a** In the Service Request screen, click the Orders view tab.
  - b** Add a new record to the Orders list and complete the necessary fields.
  - c** Click the Order#.  
The Orders screen appears.
  - d** In the Orders screen, enter additional details about the order, including line items representing equipment and rentals.

## Dispatching and Performing Well Service Jobs (End User)

When the Service Request or Order record is completed, the Siebel application generates the activities that workers must perform to do this job, as described in “[Creating Well Service Jobs \(End User\)](#)” on page 185. The Activity records are linked to the well where the work will be performed.

The dispatcher schedules these activities on the dispatch board, assigning the activities to specific time slots for specific workers.

After the dispatcher schedules the job, members of the crew can see the new activities assigned to them in the My Activities view. The crew looks at the Well record associated with the job to locate the well. Then the crew accepts the job and drives to the well.

When it arrives at the well, the crew updates the status of the Activity record to indicate that work has started. As the crew performs the work, employees examine the appropriate safety steps on the activity record.

When the job is complete, the crew updates the status of the Activity record to indicate that the work is completed. Then, the crew generates an invoice for the customer at the well site. The invoice includes information about the operator, the operator address, the work performed, and the equipment installed at the well. The customer examines and approves the invoice.

For more information, see the sections on scheduling, dispatching, and invoices in *Siebel Field Service Guide*.

### Entering Information about Readings

If the crew must perform well tests for the job, they enter the results in the Readings view of the Well screen.

#### *To enter the results of readings*

- 1 Navigate to the Wells screen.
- 2 In the Well list, select the well.
- 3 Click the Readings view tab.
- 4 In the Readings list:
  - a Select the appropriate measurement type for the reading.
  - b Click New to create a new Readings record.
  - c Enter the actual reading in the Reading field and comments as needed in the Comment field.

## Working with Partners on Oil Well Management

A customer may want the oil field service company to work with a partner company on a job. You can use the Partner Portal to coordinate your employees and employees of the partner company.

First, you must set up Siebel Partner Relationship Management.

Then, the dispatcher at the oil field service company can allow the operations manager at the partner company access to view the Service Request record representing the job and the Order record representing the work ticket through the Partner Portal. The operations manager at the partner company can check the status of the job to know when the services of the partner company are needed at the well site and can use this information to schedule partner company employees.

The dispatcher at the oil field service company can also add the appropriate partner field service engineers to the Job and Work Ticket. These partner employees will be able to see the information about the job through the Partner Portal.

For more information about setting up and using Siebel Partner Relationship Management, see *Siebel Partner Relationship Management Administration Guide* and *Siebel Partner Relationship Management Administration Guide Addendum for Industry Applications*.

# A

## Technical Reference for the Price Comparison Feature

This appendix provides detailed information about the Price Comparison feature in Siebel Energy. It supplements the basic concepts, business scenarios, and procedures described in [Chapter 10, "Price Comparison in Siebel Energy."](#)

Specifically, this appendix details each of these components, which make up the pricing calculator:

- SmartScript to collect user inputs (see ["SmartScript for Price Comparison" on page 189](#))
- Two primary workflows:
  - SIS OM PC Comparison workflow (see ["SIS OM PC Comparison Workflow" on page 205](#))
  - SIS OM PC Enrollment workflow (see ["SIS OM PC Enrollment Workflow" on page 208](#))
- Two primary methods called by the workflows:
  - Bill Decomposer (see ["Bill Decomposer Method" on page 197](#))
  - Comparison Generator (see ["Comparison Generator Method" on page 197](#))
- Other Siebel workflows and methods

This appendix includes the following topics:

- ["SmartScript for Price Comparison"](#)
- ["SIS OM Pricing Calculator Business Service" on page 195](#)
- ["SIS OM PC Comparison Workflow" on page 205](#)
- ["SIS OM PC Enrollment Workflow" on page 208](#)
- ["SIS OM PC Competitive Pricing Report Process Workflow" on page 214](#)

## SmartScript for Price Comparison

The SIS OM SmartScript functionality can be conceptually broken into five parts:

- Business component classes that invoke the SIS OM SmartScript
- SIS OM SmartScripts (one standard and one high interactivity version)
- SIS OM SmartScript engine classes
- The EPC Admin VBC business component
- SIS OM PC Workflows that use SmartScript answers collected by the SIS OM SmartScripts

This section describes all these parts followed by user property descriptions and a graphic showing the SmartScript text.

**CAUTION:** The values described in this section should *not* be changed.

## Business Component Classes

These business component classes are used to invoke the SIS OM SmartScript:

- Method SISOMCreateQuote in class CSSSIABCQuote

In Siebel eSales, this method is called using the Compare Price link on the Home page. Invoking this method from these standard interactivity applications invokes the standard interactivity SmartScript.

In Siebel Energy, this method is invoked from the PC Price Comparison view. Invoking this method from this high interactivity application causes the high interactivity SmartScript to run.

**NOTE:** In Siebel Energy, this class is used by the Quote business component. When this method is invoked from the PC Price Comparison view, there is a link between the Opportunity and Quote business components, where the Opportunity is the parent. In this case, the current Opportunity row ID and Opportunity name are passed as input to the SmartScript when this method is called. The SmartScript then passes these values to the workflow that is invoked when the SmartScript Finish button is clicked.

- Method SISOMRunPCReport in class CSSSISOMBCProductRelationship

This method can be used to run the SIS OM SmartScript in report mode. The method is invoked when the CP Reports button from the Product Relationship view in Siebel Energy is clicked.

**NOTE:** This method should not be used when the application is in standard interactivity mode.

**NOTE:** Both methods call the RunSmartScript method in the SIS OM PC Service business service to start the SIS OM SmartScript Engine.

## SIS OM SmartScript

There are two versions of the SIS OM SmartScript.

**SIS OM PC Comparison Smart Script - HI.** This is the high interactivity version used in Siebel Energy.

**SIS OM PC Comparison Smart Script - LI.** This is the standard interactivity version used in Siebel eSales and Siebel Partner Relationship Management (Siebel PRM) for Siebel Energy.

**NOTE:** In standard interactivity mode, SmartScript questions that use dynamic answers must be broken into separate SmartScript pages whenever the answer from one SmartScript is used as the input for the next SmartScript question.

## SIS OM SmartScript Engine Classes

These two classes make up the SIS OM SmartScript Engine:

- CSSSWESISOMFrameWebCallScriptPlayer, used by the SIS OM Smart Script Player Applet
- CSSSISOMBCVCallScriptPlayer, used by the business component SIS OM Smart Script Player

**NOTE:** When you configure using Siebel Tools, both engine classes and their associated applet and business component must be used together for SIS OM SmartScript Engine to work properly.

## SIS OM PC Workflows

There are two SIS OM PC workflows provided out-of-the-box that are invoked by the SIS OM SmartScript.

**SIS OM PC Competitive Pricing Report workflow.** This workflow is invoked when the CP Reports button is clicked in the Product Relationship view in Siebel Energy.

**SIS OM PC Comparison Process workflow.** This workflow is called in Siebel Energy when the CP Reports button is clicked in the PC Price Comparison view. For Siebel eSales for Siebel Energy, this workflow is called from the Compare Price link on the Home page.

For more information on these workflows, see [“SIS OM PC Competitive Pricing Report Process Workflow” on page 214](#) and [“SIS OM PC Comparison Workflow” on page 205](#).

## EPC Admin Virtual Business Component

The EPC Admin virtual business component is used to specify data sources (that is, LOVs and business components) where SmartScript answers for a particular question can be found. For more information, see *Siebel SmartScript Administration Guide*.

## SIS OM SmartScript Player User Properties

The following business component user properties, used by the SIS OM Smart Script Player business component, are used to enable the following SIS OM PC specific functionality.

### Off Page Answer Branching

This set of user properties allows a SmartScript to branch to a different SmartScript page, using a SmartScript answer from another page.

**SIS OM Branch Question.** Specifies which SmartScript question contains the answer used for off page branching.

**SIS OM Branch Answer.** Specifies which SmartScript answer triggers branching. This value is in language independent code.

**SIS OM Branch Answer LOV.** Specifies the LOV used in conjunction with user property SIS OM Branch Answer to find the language dependent value.

**SIS OM Branch Trigger Answer.** The value of this user property is used to find the SmartScript question that contains the off answer branch. The SmartScript question must have this value specified as its default answer.

### Dynamic Answers

This functionality allows the SmartScript to dynamically find, using a business service, the possible SmartScript answers for the Rate Plan and Supplier questions for both the electricity and gas questions.

**SIS OM PC Service Name.** Name of the business service that contains the methods used to get the Rate Plan (Get Area Rate Plan Names) and the Supplier (Get Area Supplier Names). The value of this user property should *not* be changed.

**SIS OM Question Service Type.** Specifies which question is used to get the Service Type (Electricity or Gas). The Service Type is used as input to the Get Area Rate Plan Names and Get Area Supplier Names methods.

**SIS OM Question Electric Service Area.** Specifies which SmartScript question contains the electricity Service Area question. The Service Area is used as input to the Get Area Rate Plan Names and Get Area Supplier Names methods.

**SIS OM Question Electric Supplier Name.** Specifies which SmartScript question contains the electricity Supplier Name question. The answers displayed by this SmartScript question come from calling the SIS OM PC Service business service's method and Get Area Supplier Names.

**SIS OM Question Electric Rate Plan.** Specifies which SmartScript question contains the electricity Rate Plan question. The answers displayed by this SmartScript question come from calling the SIS OM PC Service business service's Get Area Rate Plan Names method.

**NOTE:** This method takes the Supplier Name, as well as the Service Type and Service Area, as input, so the Supplier Name SmartScript question must come before the Rate Plan question for a particular Service Type.

**SIS OM Question Gas Service Area.** Specifies which SmartScript question contains the gas Service Area question. The Service Area is used as input to the Get Area Rate Plan Names and Get Area Supplier Names methods.

**SIS OM Question Gas Supplier Name.** Specifies which SmartScript question contains the gas Supplier Name question. The answers displayed by this SmartScript question come from calling the SIS OM PC Service business service's method and Get Area Supplier Names.

**SIS OM Question Gas Rate Plan.** Specifies which SmartScript question contains the gas Rate Plan question. The answers displayed by this SmartScript question come from calling the SIS OM PC Service business service's Get Area Rate Plan Names method.

**NOTE:** This method takes the Supplier Name, as well as the Service Type and Service Area, as input, so the Supplier Name SmartScript question must come before the Rate Plan question for a particular Service Type.

## Report Mode

These user properties are used when the SmartScript is in report mode. The SmartScript is in report mode when the SmartScript is invoked from the Relationship view New button (method invoked SISOMRunPCReport using class CSSSISOMBCProductRelationship).

**SIS OM Report Mode: No Answer Validation #.** Specifies which SmartScript questions do not need to be answered when in report mode. If a SmartScript question is left blank and it uses this user property, then the system will operate as if All SmartScript answers were selected for this question.

**SIS OM Report Mode: On Finish View.** Specifies which view is displayed after the report workflow is started.

**SIS OM Report Mode: SIS OM Finish Workflow.** Specifies which workflow is called to generate the report when the SmartScript Finish button is clicked.



### General User Properties

**SIS OM Finish Workflow.** Specifies which workflow is called when the SmartScript Finish button is clicked.

## SIS OM Pricing Calculator Business Service

For more information on this business service, see [“SIS OM Pricing Calculator Business Service” on page 195.](#)

The following user properties are broken down by business service methods.

### CP Report Create Quotes Method

The following user properties are used by the CP Report Create Quotes method, which is used to create the data set used when generating a report.

**Dual Fuel Service Type.** Specifies the language independent code used to specify the dual fuel Service Type.

**Service Type Question Name.** Specifies which SmartScript question in the SmartScript answer table contains the Service Type.

**Electric Region Question Name.** Specifies which SmartScript question in the SmartScript answer table contains the electricity Region (Service Area).

**Electric Service Type.** Specifies the language independent code used to specify the electricity Service Type.

**Electric Supplier Question Name.** Specifies which SmartScript question in the SmartScript answer table contains the electricity Supplier.

**Electric Tariff Question Name.** Specifies which SmartScript question in the SmartScript answer table contains the electricity Tariff (Rate Plan).

**Gas Region Question Name.** Specifies which SmartScript question in the SmartScript answer table contains the electricity Region (Service Area).

**Gas Service Type.** Specifies the language independent code used to specify the gas Service Type.

**Gas Supplier Question Name.** Specifies which SmartScript question in the SmartScript answer table contains the gas Supplier.

**Gas Tariff Question Name.** Specifies which SmartScript question in the SmartScript answer table contains the gas Tariff (Rate Plan).

### Run SmartScript Method

The following user properties are used by the Run SmartScript method as defaults if these values are not specified as input to this method.

**SIS OM ScriptName - HI.** Specifies the default SIS OM SmartScript to run if the application is in high interactivity mode.

**SIS OM ScriptName - LI.** Specifies the default SIS OM SmartScript to run if the application is in standard interactivity mode.

**SIS OM ViewName.** Specifies the default view that contains the SIS OM SmartScript Engine.

Figure 21 shows the SmartScript text for the Price Comparison feature.

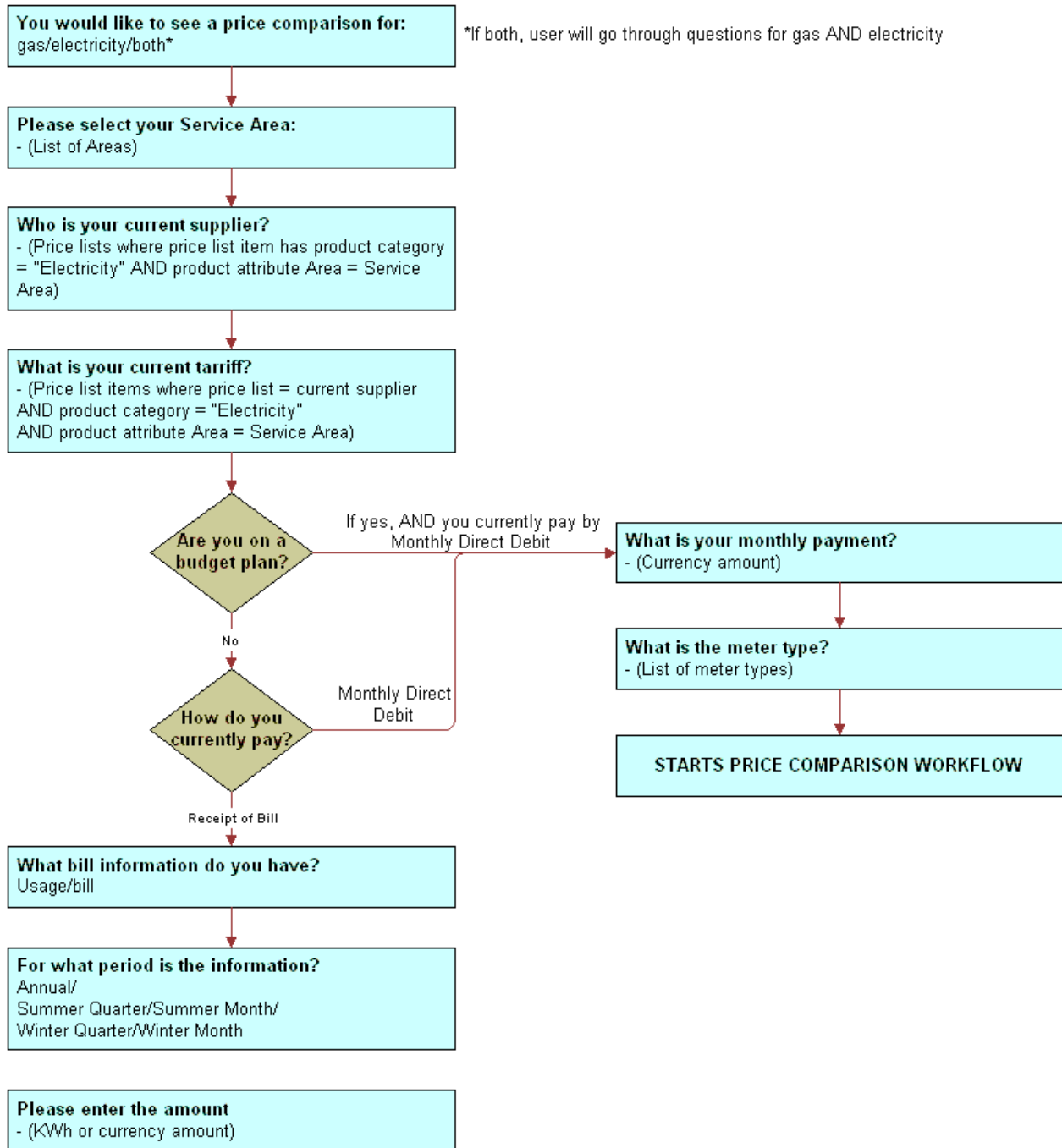


Figure 21. SmartScript Workflow for Price Comparison

# SIS OM Pricing Calculator Business Service

The SIS OM Pricing Calculator (PC) business service is a set of methods that implements the back-end calculation engine for the pricing calculator. Different workflows, which provide the business flow of this functionality, invoke the methods.

The two primary methods, Bill Decomposer and Comparison Generator, decompose a utility bill from a prospective customer into the usage breakdown and use that data to determine the comparable internal rate plans that best meet the customer's criteria.

More specifically, Bill Decomposer receives a PC Competitor quote that represents the utility bill from a competitor as input. Based on the details of competitors' rate plans stored in the Siebel database, Bill Decomposer then reverse-engineers the utility bill information to deduce the usage breakdown of this prospective customer. It stores the result in the PC Competitor quote.

The quote is then passed to Comparison Generator, which looks up the internal rate plans to locate those that meet the customer's requirements. Comparison Generator then creates a PC Comparison quote for each of those matching rate plans and uses the Pricing Engine to calculate the potential savings available to prospective customers, if they switch to the rate plans.

## User Properties for Pricing Calculator Methods

Pricing Calculator methods use these user properties:

- **XA Name - Area.** Name of the product attribute used to store the service area where the rate plan is being offered.
- **XA Name - Usage Type.** Name of the product attribute used to store the usage breakdown category of the rate plan. Out of the box, the value of this property is Usage Type.
- **Usage Type *n*.** Valid values for the Usage Type attribute specified by the XA Name - Usage Type user property.

For example:

Name	Value
Usage Type 1	Peak
Usage Type 2	Off Peak
Usage Type 3	Threshold

**NOTE:** For instructions on adding a new usage type, see ["To add a new usage type for the pricing calculator"](#) on page 196.

- **Threshold Usage Type.** Value of the Usage Type attribute that is handled as the threshold usage (that is, the number of units charged at a specified price before applying other pricing rules). Out of the box, the value is Threshold.

- **Peak.** Name of the field of the SIS OM PC Usage Profile business component that is used to store the Peak category of usage breakdown.
- **Off Peak.** Name of the field of the SIS OM PC Usage Profile business component used to store the Off Peak category of usage breakdown.
- **Must Match XA n.** Names of product attributes that an internal rate plan must possess in order to be qualified as a match to the current rate plan used by the prospective customer.

For example:

Name	Value
Must Match XA 1	MeterType
Must Match XA 2	Region

- **PC Type n.** Names of all the basic (non-dual) service types of products used in the Pricing Calculator functionality.

For example:

Name	Value
PC Type 1	Electricity
PC Type 2	Gas

- **Dual Fuel Service Type.** Name of the service type of products designated for dual fuel discount processing.
- **SIS OM ViewName.** Default view to use when displaying the PC SmartScript. It is used by the Run SmartScript method.
- **SIS OM AppletName.** Default applet to use when displaying the PC SmartScript. It is used by the Run SmartScript method.
- **SIS OM ScriptName - HI.** Default SmartScript script to use in high interactivity mode. It is used by the Run SmartScript method.
- **SIS OM ScriptName - LI.** Default SmartScript script to use in standard interactivity mode. It is used by the Run SmartScript method.

### ***To add a new usage type for the pricing calculator***

- 1 Add the new value to the attribute specified by the user property XA Name - Usage Type.
- 2 Add a new user property *Usage Type n* to specify this new value.
- 3 Add both a new field to the SIS OM PC Usage Profile business component and a new column to its underlying table for the data storage.
- 4 Add a new user property with this new usage type as the name and the Business Component field name added above as the value.

## Bill Decomposer Method

This method is part of [“SIS OM Pricing Calculator Business Service.”](#)

This method decomposes a utility bill provided by a prospective customer into the usage breakdown. The calculation is based on a number of billing parameters derived from the information on the utility bill.

### Arguments

*PCMultiQuotes*

[in/out] List of SIS OM Quote integration object instances that are used to store the utility bill information provided by a prospective customer. The usage breakdown is also written back into this quote structure as output. (Required)

### Returns

List of SIS OM Quote integration object instances that contain the usage breakdown.

### Remarks

The usage breakdown is represented in a quote integration object as the Quantity field of a usage sub-line item with the Usage Type attribute set to a specific value (for example, Threshold, Peak, Off Peak).

### See Also

[“SIS OM PC Comparison Workflow”](#) on page 205.

## Comparison Generator Method

This method is part of [“SIS OM Pricing Calculator Business Service.”](#)

This method locates the comparable internal rate plans that match the rate plan currently provided to the prospective customer by a competitor. It creates a quote of type PC Comparison for each of the matching internal rate plans, setting the Quantity field to the usage breakdown obtained from the PCMultiQuotes input (which is usually generated from the Bill Decomposer Business Service method).

### Arguments

*PCMultiQuotes*

[in] List of SIS OM Quote integration object instances that are used to store the utility bill information provided by a prospective customer, along with the usage breakdown calculated by the Bill Decomposer method. (Required)

*Opportunity*

[in] Name of the opportunity object under which the generated PC Comparison quotes should be stored. (Required)

*PriceList*

[in] Name of the Price List that contains the collection of internal products from which matching rate plans should be located. (Required)

*OpportunityRevenueAmt*

[out] Summation of the total bill amount for each of the utility bills represented in the PCMultiQuotes input argument.

### Returns

*OpportunityRevenueAmt*

Total bill amount the prospective customer is paying a competitor for.

### Remarks

The usage breakdown is represented in a quote integration object as the Quantity field of a usage sub-line item with the Usage Type attribute set to a specific value (for example, Threshold, Peak, Off Peak).

### See Also

["Bill Decomposer Method" on page 197](#) and ["SIS OM PC Comparison Workflow" on page 205](#).

## Update Status Method

This method is part of ["SIS OM Pricing Calculator Business Service."](#)

This method searches for all quotes with a certain type for a given opportunity and updates a user-specified field in those quotes.

### Arguments

*Opportunity Id*

[in] ID of the opportunity for which the quotes are to be updated. (Required)

*QuoteType*

[in] Type of the quotes for which the user wants to query. (Required)

*FieldName*

[in] Name of the field in the quote business component that the user intends to update. (Required)

*FieldValue*

[in] Value to be set to the field in the quote business component that the user intends to update. (Required)

### Returns

*None.*

### Remarks

In the out-of-the-box use of this method, the value of Opportunity Id is passed through the Named Method that invokes the SIS OM PC Enrollment workflow, within which the other values of QuoteType, FieldName and FieldValue are set.

### See Also

["SIS OM PC Enrollment Workflow"](#) on page 208.

## Get Area Rate Plan Names Method

This method is part of ["SIS OM Pricing Calculator Business Service."](#)

This method locates available rate plans provided by any company (supplier) within a service area.

### Arguments

*Supplier Name*

[in] Name of the company whose rate plans are needed. (Optional)

*Service Area*

[in] Region within which the rate plans are needed. (Optional)

*Service Type*

[in] Type of service for search. Possible inputs are Gas, Electricity, or Dual Fuel. (Required)

### Returns

List of rate plans that match the criteria.

### Remarks

The list of rate plans is returned in a string in this structure: Plan 1, Plan 2, and so on.

## Get Area Supplier Names Method

This method is part of ["SIS OM Pricing Calculator Business Service."](#)

This method returns the list of supplier names for a given service type in a given service area.

### Arguments

*Service Area*

[In] Region within which the rate plans are needed. (Optional)

*Service Type*

[In] Type of service for search. Possible inputs are Gas, Electricity, or Dual Fuel. (Required)

### Returns

List of supplier names that match the criteria.

### Remarks

The list of supplier names is returned in a string in this structure: Company 1, Company 2, and so on.

## Run SmartScript Method

This method is part of ["SIS OM Pricing Calculator Business Service."](#)

This method is used to run the pricing calculator's SmartScripts.

### Arguments

*Script Name*

[in] Name of the SmartScript to run. (Optional)

If this parameter is not supplied, then the business service user property SIS OM ScriptName - HI is used to find the default SmartScript when running in high interactivity mode. When running in standard interactivity mode, the business service user property SIS OM ScriptName - LI is used to find the default SmartScript. For more information, see ["User Properties for Pricing Calculator Methods" on page 195](#).

*Applet Name*

[in] Name of the applet used to display the SmartScript. (Optional)

If this parameter is not supplied, then the business service user property SIS OM AppletName is used to find the default applet. For more information, see ["User Properties for Pricing Calculator Methods" on page 195](#).

*View Name*

[in] Name of the view used to display the SmartScript. (Optional)

If this parameter is not supplied, then the business service user property SIS OM ViewName is used to find the default view. For more information, see ["User Properties for Pricing Calculator Methods" on page 195](#).

*Currency Code*

[in] Sets the current code used by the SmartScript. (Optional)

*Language Code*



[in] Sets the language code used by the SmartScript. (Optional)

*Script Id*

[in] Used to "rerun" a previous SmartScript session. (Optional)

#### Returns

*None*

## Convert PC Quote to Quote Method

This method is part of ["SIS OM Pricing Calculator Business Service."](#)

This method converts a Price Comparison (PC) Quote into a regular quote. The quantity for usage products is reset to "1," which is the number of items to be ordered.

#### Arguments

*Account*

[in] Name of the account for the PC Quote. (Optional)

*QuoteId*

[in] Quote Id of the PC Quote that is to be converted to a regular quote. (Required)

*SiebelMessage*

[out] Property set output that represents the regular quote. (Optional)

*AutoSync*

[in] True or false value used to synchronize the regular quote to the database. For performance reasons, this is usually not specified and the regular quote is synchronized to the database after other operations that follow this step.

#### Returns

*SiebelMessage*

Property set output that represents the regular quote.

#### See Also

["SIS OM PC Enrollment Workflow"](#) on page 208.

## Convert PC Input to PC Quote Method

This method is part of ["SIS OM Pricing Calculator Business Service."](#)

The answers from a SmartScript session are taken as the Pricing Calculator input and are converted into a Competitor Quote. Multiple quotes are created as appropriate, based on the SmartScript answers.

### Arguments

*PCMultiQuotes*

[out] List of SIS OM Quote integration object instances that are used to store the utility billing information provided by a prospective customer. (Required)

*Opportunity*

[in] Name of the opportunity object under which the generated PC Comparison quotes will be stored. (Required)

*OpportunityId*

[in] ID of the opportunity object under which the generated PC Comparison quotes will be stored. (Required)

*RunId*

[in] RunId of the SmartScript session where the answers are stored. This typically will be a process property that is set internally when the SmartScript session is finished. (Required)

### Returns

*PCMultiQuotes*

List of SIS OM Quote integration object instances that are used to store the utility billing information provided by a prospective customer.

### See Also

["SIS OM PC Comparison Workflow" on page 205.](#)

## Setup Question FieldMap Method

This method is part of ["SIS OM Pricing Calculator Business Service."](#)

This method determines the type of the question, the name of the business component, and the field where the answer to a specific SmartScript question should be stored. This step is required before the PC Input to PC Quote conversion method is called.

The syntax for the arguments is: *type-buscomp-field*, where *type* is a value of PC Type *n* user properties.

### Arguments

*Electricity-Quote Item-Product*

*Electricity-Quote Item XA-Meter Type*

*Electricity-Quote Item XA-Payment Method*

*Electricity-Quote Item-Usage CxTotal*

*Electricity-Quote-Bill Period*

*Electricity-Quote-PC Bill Info*

*Electricity-Quote-PC Budget Plan*

*Electricity-Quote-Price List*

*Electricity-Quote-Region*

*Gas-Quote Item XA-Meter Type*

*Gas-Quote Item XA-Payment Method*

*Gas-Quote Item-Product*

*Gas-Quote Item-Usage CxTotal*

*Gas-Quote-Bill Period*

*Gas-Quote-PC Bill Info*

*Gas-Quote-PC Budget Plan*

*Gas-Quote-Price List*

*Gas-Quote-Region*

[in] A list of mapping arguments that are mapped to a corresponding question name. The list should be defined whether a customer chooses to answer all questions at runtime or not. The argument values are the question names. (Required)

### Returns

*None*

### See Also

["SIS OM PC Comparison Workflow" on page 205.](#)

## Delete Existing PC Quotes Method

This method is part of ["SIS OM Pricing Calculator Business Service."](#)

This method deletes existing PC Quotes for a given opportunity.

### Arguments

*Opportunity*

[in] Name of the opportunity for which all the existing PC Quotes should be deleted. (Required)

### Returns

*None*

### Remarks

The Delete PC Quotes Search Spec user property of the Quote business components specifies the search specification to be used by the method to determine which quotes to delete.

### See Also

["SIS OM PC Comparison Workflow" on page 205.](#)

## CP Report Create Quotes Method

This method is part of ["SIS OM Pricing Calculator Business Service."](#)

This is an intermediate step in the generation of the Competitive Pricing report. It takes input from a SmartScript session and reads the Pricing Calculator Relationship entries. It replaces some of the SmartScript answers and generates a quote for each In-House entry in the Relationship table, as well as a matching quote for each "like-for-like" Competitor entry.

Since this method invokes Convert PC Input to PC Quote internally, its arguments are formed as for that method, and passed through. CP Create Quotes directly uses only the RunId of the SmartScript session.

### Arguments

*PCMultiQuotes*

[out] A list of SIS OM Quote integration object instances that are used to store the utility billing information provided by a prospective customer. (Required)

*Opportunity*

[in] The name of the opportunity object under which the generated PC Comparison quotes will be stored. (Required)

*OpportunityId*

[in] The Id of the opportunity object under which the generated PC Comparison quotes will be stored. (Required)

*RunId*

[in] The RunId of the SmartScript session where the answers are stored. This typically will be a process property that is set internally when the SmartScript session is finished. (Required)

### Returns

*PCMultiQuotes*

A list of SIS OM Quote integration object instances that are used to store the utility billing information provided by a prospective customer.

## Get Next RowId Method

This method is part of "SIS OM Pricing Calculator Business Service."

This method generates a unique system RowId that can be used to populate required fields in business components.

### Arguments

*RowId*

[out] The system-generated RowId is returned.

## SIS OM PC Comparison Workflow

The SIS OM PC Comparison Process is called by a SmartScript session. The SmartScript session is invoked by clicking the New button in the SIS OM PC Opportunity Price Comparison view or by clicking the Compare Prices link on Oracle's Siebel eSales Home Page, as shown in Figure 22.

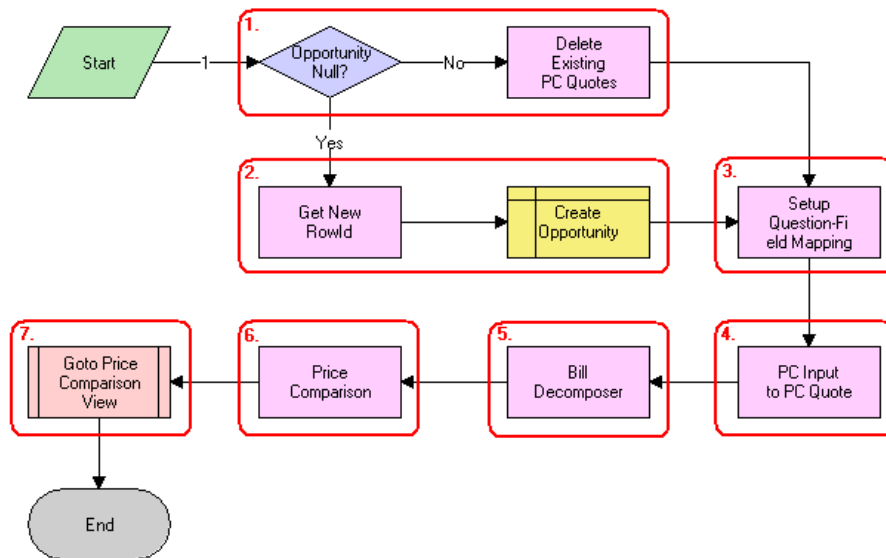


Figure 22. SIS OM PC Comparison Process

This workflow does the following:

- 1 A check is made to determine whether an opportunity exists for the Price Comparison. If an opportunity exists, all existing quotes that meet the specified criteria will be deleted. Out-of-the-box quotes of type PC Comparison, PC Like for Like, and PC Competitor will be deleted.

- 2 If an opportunity does not exist, a new opportunity is created.
- 3 The SmartScript session questions are mapped to fields of a quote.
- 4 The answers from the SmartScript session are converted into a competitor quote using the mapping created in the previous step.
- 5 The Bill Decomposer method uses the competitor quote information to calculate the user's annual usage.
- 6 The Price Comparison method generates a comparison quote for each product offered by the company that meets the criteria specified by the user. The usage amounts calculated by the Bill Decomposer step are used to calculate the projected annual bill given the pricing of the product.
- 7 The comparison quotes are displayed in the Opportunity Price Comparison view. For more details, see ["SIS OM Goto Price Comparison View Workflow" on page 207](#).

Table 36 lists the SIS OM PC Comparison Workflow steps, methods, and business services.

Table 36. Business Service Methods for SIS OM PC Comparison Workflow

This Workflow Step	Calls This Method	In This Business Service
Delete Existing PC Quotes	Delete Existing PC Quotes	SIS OM Pricing Calculator Service
Get New RowId	Get Next RowId	SIS OM Pricing Calculator Service
Setup Question-Field Mapping	Setup Question Field Map	SIS OM Pricing Calculator Service
PC Input to PC Quote	Convert PC Input to PC Quote	SIS OM Pricing Calculator Service
Bill Decomposer	Bill Decomposer	SIS OM Pricing Calculator Service
Price Comparison	Comparison Generator	SIS OM Pricing Calculator Service

## SIS OM Goto Price Comparison View Workflow

The SIS OM Goto Price Comparison View workflow is invoked as a subprocess of the SIS OM PC Price Comparison workflow, as shown in [Figure 23](#).

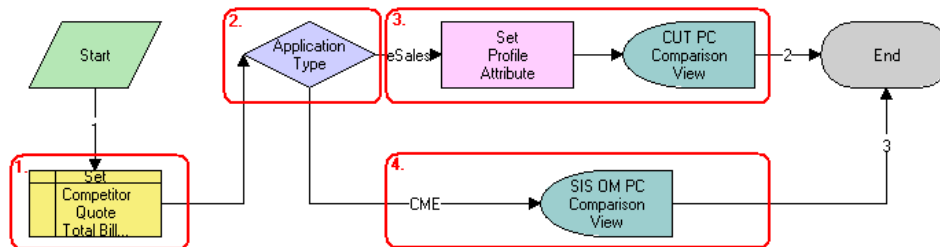


Figure 23. SIS OM Goto Price Comparison View Process

This workflow does the following:

- 1 The Primary Revenue Amount of the Opportunity is set to the total bill amount, passed as an input to the workflow.
- 2 The application that is invoking the workflow is checked.
- 3 If the application is eSales, the Opportunity Id is stored as a profile attribute and the CUT Opportunity PC Price Comparison View (eSales) is displayed.
- 4 Otherwise, the SIS OM Opportunity PC Price Comparison View is displayed.

[Table 37](#) lists the Goto Price Comparison Workflow steps, methods, and business services.

Table 37. Business Service Methods for Goto Price Comparison View Workflow

This Workflow Step	Calls This Method	In This Business Service
Set Profile Attribute	Set Profile Attribute	SIS OM Product Manipulation Toolkit Service

## SIS OM PC Enrollment Workflow

The SIS OM PC Enrollment workflow is invoked by clicking the Enroll button in the SIS OM PC Opportunity Price Comparison View or the CUT Opportunity PC Price Comparison View (eSales), as shown in [Figure 24](#).

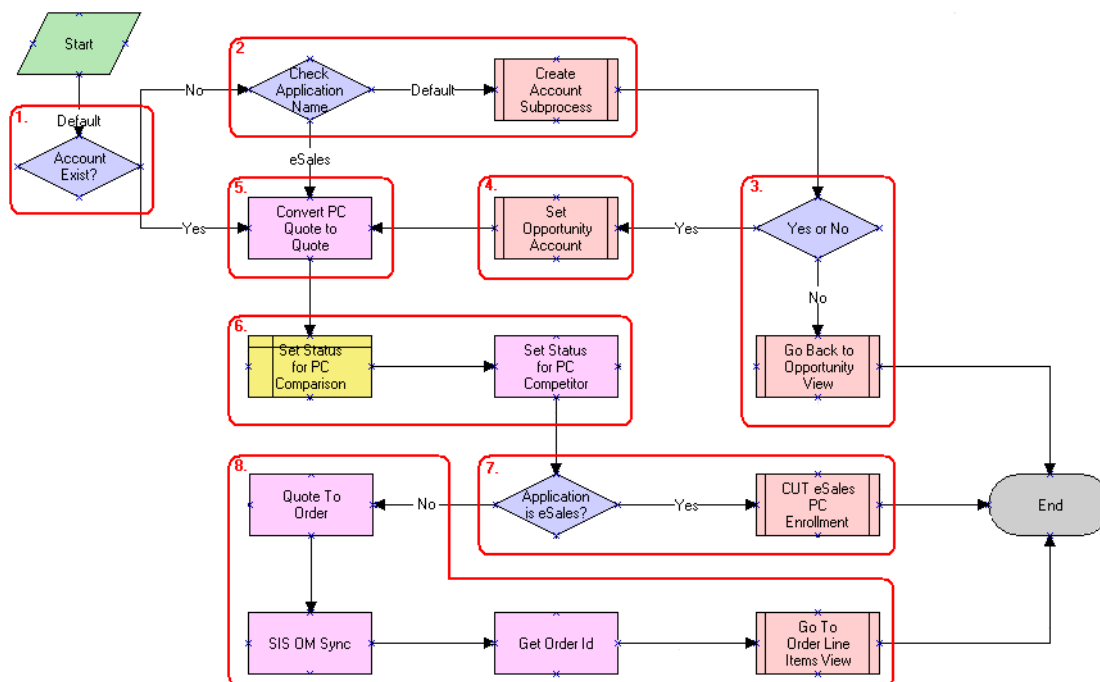


Figure 24. SIS OM PC Enrollment Process

This workflow does the following:

- 1 A check is made to determine whether an account is associated with the opportunity.
- 2 If an account does not exist and the application that invoked the workflow is not eSales, the SIS OM PC Account Entry view is displayed to allow the user to create a new account. For more details, see [“SIS OM PC Create Account Subprocess Workflow” on page 209](#).
- 3 A check is made to see whether an account was created. If an account was not created, the user is returned to the SIS OM PC Opportunity Price Comparison view. For more details, see [“SIS OM PC Go To Opportunity View Workflow” on page 210](#).
- 4 If the user created a new account, the account is associated with the opportunity. For more details, see [“SIS OM PC Set Opportunity Account Workflow” on page 210](#).
- 5 The comparison quote is converted to a regular quote that can be progressed through the order life cycle.
- 6 The Status of the comparison and competitor quotes is set to Order Placed.
- 7 If the application that invoked the workflow is eSales, the comparison quote is merged with the shopping cart. For more details, see [“CUT eSales - PC Enrollment Workflow” on page 211](#).



- 8 If the application is not eSales, the quote is converted to an order and the order is displayed in the Order Line Item view. For more details, see “SIS OM PC Go to Order Entry - Line Items View (Sales) Workflow” on page 211.

Table 38 lists the SIS OM PC Enrollment Process steps, methods, and business services.

Table 38. Business Service Methods for SIS OM PC Enrollment Process

This Workflow Step	Calls This Method	In This Business Service
Convert PC Quote to Quote	Convert PC Quote to Quote	SIS OM Pricing Calculator Service
Set Status for PC Competitor	Update Status	SIS OM Pricing Calculator Service
Quote to Order	Convert Product Instance	SIS OM Product Manipulation Toolkit Service
SIS OM Sync	Synchronize	SIS OM Product Manipulation Toolkit Service

## SIS OM PC Create Account Subprocess Workflow

The SIS OM PC Create Account Subprocess is invoked as a subprocess of the SIS OM PC Enrollment workflow, as shown in Figure 25.

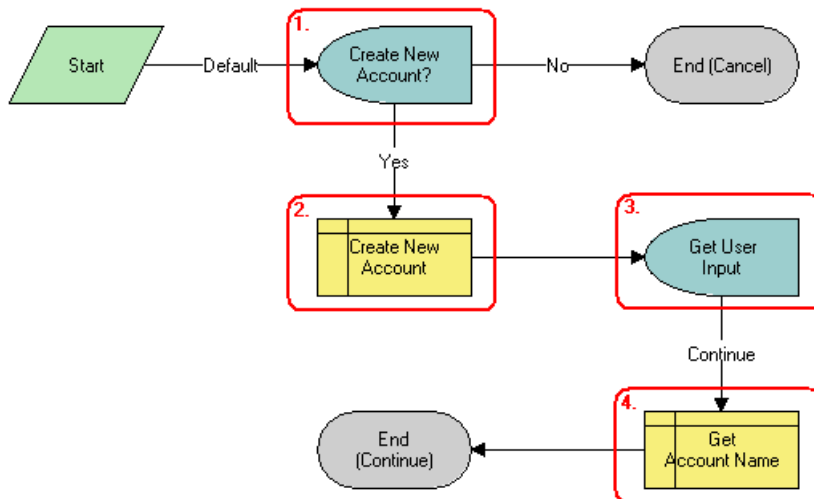


Figure 25. SIS OM PC Create Account Subprocess

This workflow does the following:

- 1 The SIS OM PC Account Entry Selection View is displayed and the user is asked whether a new account should be created. If the user clicks No, an account is not created and the subprocess is terminated.
- 2 If the user clicks Yes, a new account is created.
- 3 The SIS OM PC Account Entry View is displayed to allow the user to enter the details of the account. The user clicks Continue.
- 4 The name of the account is retrieved and returned to the calling workflow.

## SIS OM PC Go To Opportunity View Workflow

The SIS OM PC Go To Opportunity View workflow is invoked as a subprocess of the SIS OM PC Enrollment workflow, as shown in [Figure 26](#).



Figure 26. SIS OM PC Go To Opportunity View

This workflow does the following:

- The SIS OM PC Opportunity Price Comparison view is displayed.

## SIS OM PC Set Opportunity Account Workflow

The SIS OM PC Set Opportunity Account workflow is invoked as a subprocess of the SIS OM PC Enrollment workflow, as shown in [Figure 27](#).

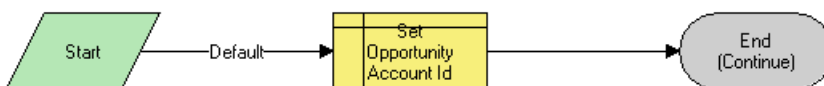


Figure 27. SIS OM PC Set Opportunity Account

This workflow does the following:

- The Account Id specified by the process property is associated with the Opportunity.

## SIS OM PC Go to Order Entry - Line Items View (Sales) Workflow

The SIS OM PC Go to Order Entry - Line Items View (Sales) is invoked as a subprocess of the SIS OM PC Enrollment workflow, as shown in [Figure 28](#).

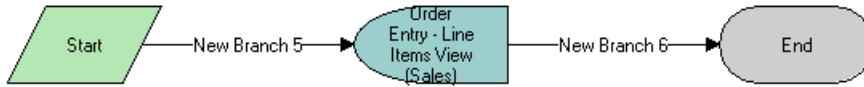


Figure 28. SIS OM PC Go to Order Entry - Line Items View (Sales)

This workflow does the following:

- Navigates to the Order Entry - Line Items View (Sales).

## CUT eSales - PC Enrollment Workflow

The CUT eSales - PC Enrollment workflow is invoked as a subprocess of the SIS OM PC Enrollment workflow, as shown in [Figure 29](#).

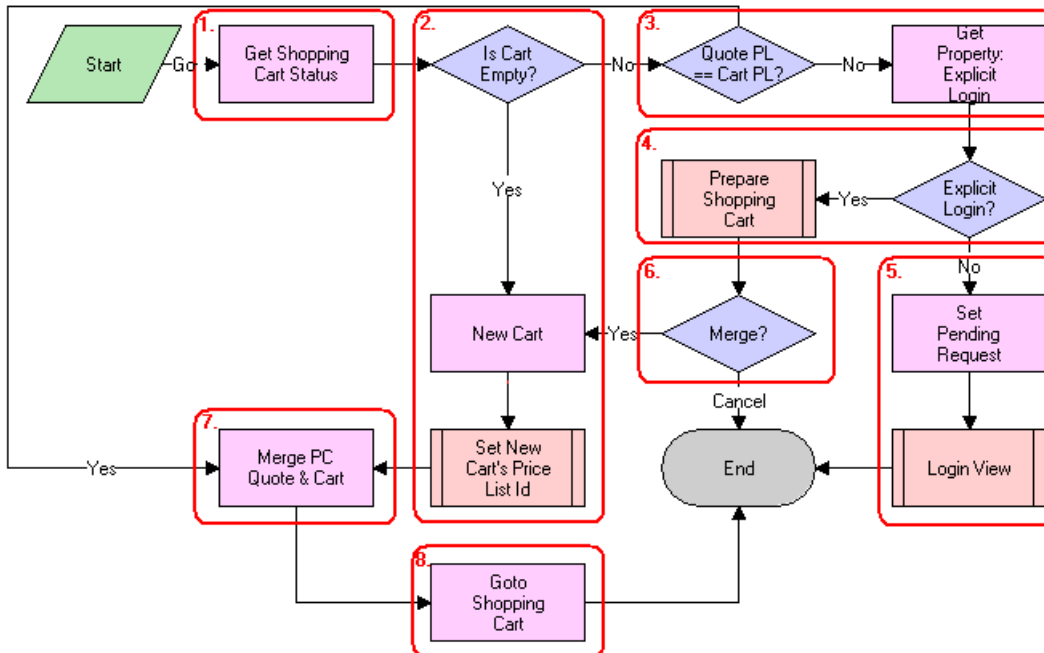


Figure 29. CUT eSales - PC Enrollment Process

This workflow does the following:

- 1 The status of the shopping cart is checked.
- 2 If the cart is empty, a new cart is created and the cart's price list is set to the Price Comparison internal price list. See ["CUT eSales - Set Shopping Cart Price List Workflow" on page 213](#) for more details.
- 3 If the cart is not empty, the cart's price list is compared to the price list of the comparison quote selected by the user. If the price lists are different, a check is made to see if the user explicitly logged in.
- 4 If the user logged in, the Save Cart Confirmation view is displayed to allow the user to specify how to handle the existing cart. See ["CUT eSales - PC Prepare Cart Process Workflow" on page 213](#) for more details.
- 5 If the user is not logged in, a request is made to display the CUT Opportunity PC Price Comparison View (eSales) on log in, and the Login View is displayed. The workflow terminates.
- 6 If the user chose not to save or discard the existing cart, the workflow is terminated.
- 7 If the comparison quote's price list and the cart's price list are the same, or a new cart was created, the comparison quote line items are added to the cart.
- 8 The Shopping Cart view is displayed.

[Table 36](#) lists the CUT eSales - PC Enrollment Process steps, methods, and business services.

Table 39. Business Service Methods for CUT eSales - PC Enrollment Process

This Workflow Step	Calls This Method	In This Business Service
Get Shopping Cart Status	GetShoppingCartStatus	CUT OET Service
Get Property: Explicit Login	GetPropValue	Shopping Service
New Cart	NewCartHeader	CUT OET Service
Set Pending Request	Set Pending Request	Shopping Service
Merge PC Quote & Cart	MergeCxObj	CUT OET Service
Goto Shopping Cart	GotoView	CUT OET Service

## CUT eSales - Set Shopping Cart Price List Workflow

The CUT eSales - Set Shopping Cart Price List process is invoked as a subprocess of the CUT eSales - PC Enrollment Process workflow, as shown in [Figure 30](#).



Figure 30. CUT eSales - Set Shopping Cart Price List

This workflow does the following:

- The cart's price list is updated to the specified value.

## CUT eSales - PC Prepare Cart Process Workflow

The CUT eSales - PC Prepare Cart Process workflow is invoked as a subprocess of the CUT eSales - PC Enrollment Process workflow, as shown in [Figure 31](#).

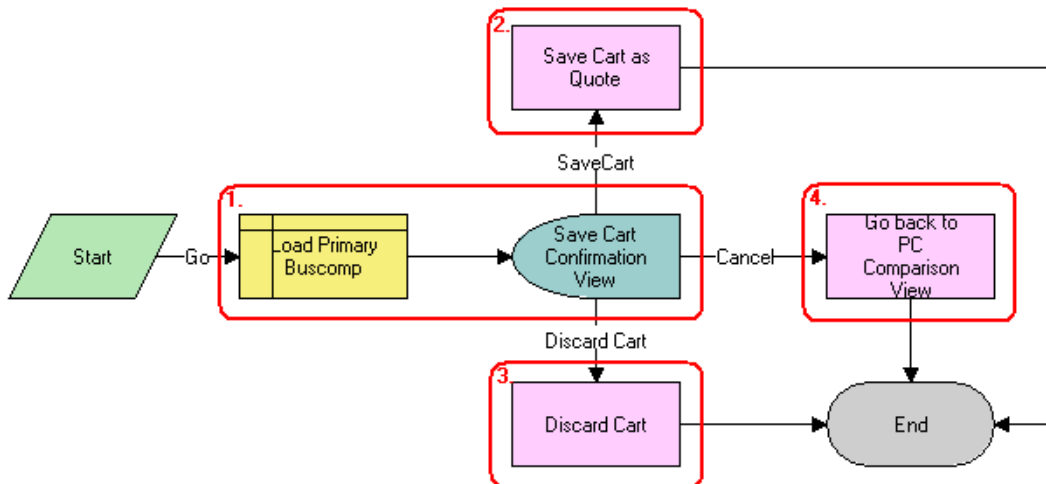


Figure 31. CUT eSales - PC Prepare Cart Process

This workflow does the following:

- 1 The current shopping cart is loaded and the Save Cart Confirmation view is displayed.
- 2 If the user chooses Save, the cart is saved.
- 3 If the user chooses Discard, the cart is discarded.

- 4 If the user chooses Cancel, the CUT Opportunity PC Price Comparison View (eSales) is displayed and the calling workflow is terminated.

Table 40 lists the CUT eSales - PC Prepare Cart Process Workflow steps, methods, and business services.

Table 40. Business Service Methods for CUT eSales - PC Prepare Cart Process

This Workflow Step	Calls This Method	In This Business Service
Save Cart as Quote	SaveCartAsQuote	Shopping Service
Discard Cart	DiscardCart	Shopping Service
Go Back to PC Comparison View	GotoView	CUT OET Service

## SIS OM PC Competitive Pricing Report Process Workflow

The workflow is called by a SmartScript session that is invoked by clicking the CP Report button in the Product Comparison > Relationships view, as shown in Figure 32.

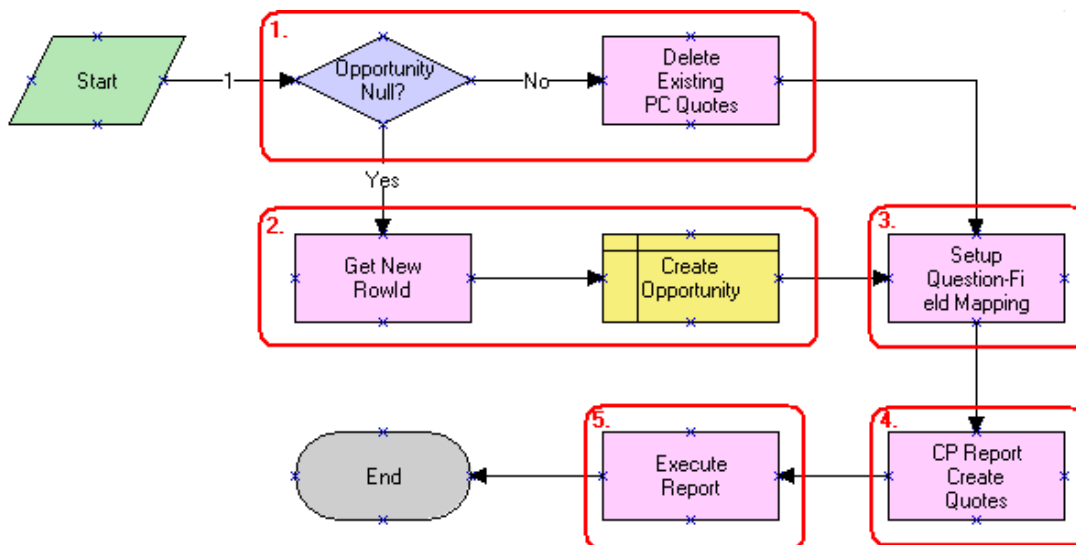


Figure 32. SIS OM PC Competitive Pricing Report Process Workflow

This workflow does the following:

- 1 A check is made to determine whether an opportunity exists for the Price Comparison. If there is an opportunity, all existing price comparison quotes are deleted.
- 2 If an opportunity does not exist a new opportunity is created.

- 3 The SmartScript session questions are mapped to fields of a quote.
- 4 The answers from the SmartScript session are converted into a competitor quote using the mapping created in the previous step.
- 5 Using the answers from the SmartScript session the data is generated for the report.
- 6 The report is executed using the data set generated by the previous step.

Table 41. Business Service Methods for SIS OM Competitive Pricing Report Process Workflow

This Workflow Step	Calls This Method	In This Business Service
Delete Existing PC Quotes	Delete Existing PC Quotes	SIS OM Pricing Calculator Service
Get New RowId	Get Next RowId	SIS OM Pricing Calculator Service
Setup Question-Field Mapping	Setup Question Field Map	SIS OM Pricing Calculator Service
CP Report Create Quotes	CP Report Create Quotes	SIS OM Pricing Calculator Service
Execute Report	Execute Report	Report Service





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