SIEBEL CALL CENTER USER GUIDE

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Contents

Introduction

Chapter 1. Product Overview

Chapter 2. Accounts

Chapter 3. Contacts

Chapter 4. Households

Chapter 5. Prospects

Chapter 6. Service Requests

Chapter 10. Quality and Change Requests

Chapter 11. Siebel eMail Response and Send eMail

Chapter 12. Campaigns and SmartScripts

Introduction

This guide describes how to use Siebel Call Center. It is intended for end users. However, managers and administrators of Siebel applications should read this book to understand the impact of their configuration and implementation decisions.

Although job titles and duties at your company may differ from those listed in the following table, the audience for this guide consists primarily of employees in these categories:

Call Center Administrators	Persons responsible for setting up and maintaining a call center; duties include designing and managing computer telephony integration, SmartScripts, and message broadcasts.
Call Center Agents and Customer Service Representatives	End users of Siebel applications who deal mainly with customer questions, but may also participate in marketing campaigns.
Marketing Administrators	Persons responsible for setting up and maintaining a marketing department; duties include designing and managing marketing campaigns, product marketing information, and product distribution lists.
Siebel Application Administrators	Persons responsible for planning, setting up, and maintaining Siebel applications.
Siebel Application Developers	Persons who plan, implement, and configure Siebel applications, possibly adding new functionality. A developer is typically someone from the Information Services department.

How This Guide Is Organized

This guide provides information necessary for understanding and using Siebel Call Center.

Chapters of this guide focus on typical business tasks concerning individual customers, customer organizations, customer households, prospective customers, requests for service, organizing and tracking individual activities, and so on. Most chapters concentrate on business tasks that are accomplished using a single screen in Siebel Call Center, such as the Accounts screen or the Contacts screen.

Additional Resources

As you use this guide, you may find it helpful to refer to the related resources listed in the following paragraphs.

Additional Documentation

The following guides contain material that is related to the information in this guide:

- *Applications Administration Guide*
- *Application Services Interface Reference*
- *Fundamentals*
- *Global Deployment Guide*
- *Siebel Communications Server Administration Guide*
- *Siebel Data Quality Administration Guide*
- *Siebel eMail Response Administration Guide*
- *Siebel Marketing Guide*
- *Siebel Sales User Guide*
- *Siebel Field Service Guide*
- *Siebel SmartScript Administration Guide*
- *Siebel Tools Reference*

Other Resources

You may also find it helpful to view documentation updates stored on Siebel SupportWeb. For information about accessing documentation updates, see the Other Information section on the home page of the *Bookshelf* CD-ROM.

Revision History

Siebel Call Center User Guide, Version 7.5 Rev. A

January 2003 Bookshelf

Table 1. Changes Made in Rev. A for January 2003 Bookshelf

Topic	Revision
"Call Center Communications Toolbar" on page 17	Revised text.
Chapter 1, "Product Overview" "Managing the Customer Dashboard" on page 19	Amplified information detailing dashboard access to other functional areas.
"Displaying and Populating the Customer Dashboard" on page 19	Replaced general reference to the communications toolbar, with reference to Siebel CTI. Edited text in note to reflect current functionality. Changed reference to communications server to Siebel CTI. Modified Customer Dashboard icon reference in the procedure, To Display the Customer Dashboard. Modified Step 1 in the procedure, To Display the Customer Dashboard.
"Siebel eMail Response and Customer Communications" on page 116	Added note in procedure to document that draft is created if you exit from outbound communications screen without canceling the email response.

Additional Changes

- Removed What's New in This Release information from Introduction chapter.
- Removed Appendix A. The views are referenced in specific topics.

1 Product Overview

This chapter describes the typical Siebel Call Center environment, introducing the home page, the communications toolbar, and message broadcasting. It provides background information and procedures for using the customer dashboard and the Siebel Search Center. The chapter concludes with a discussion of how Siebel Call Center supports interaction with customers throughout the presales and the postsales interaction stages.

Call Center and the Support Organization

Call Center and customer support software helps sales, telesales, and customer service representatives to better understand and address the needs of their customers.

Siebel Call Center allows agents to handle service, support, and sales interactions across a broad range of communication channels such as telephone, email, fax, pager, wireless messaging, voice over IP, Web collaboration, and chat. These channels are integrated, allowing each agent to become a customer-contact manager, supporting a range of products and services and presenting tailored offerings designed to meet customers needs.

Siebel Call Center provides an array of service and telesales functionality in a single application. Support personnel can provide both sales and service assistance to customers across multiple channels within their contact centers. Siebel Call Center also manages customer and account profiles, product knowledge, purchase histories, opportunities, service requests, and service-level agreements.

Call Center Home Page

When an agent logs in to the Siebel Call Center application, the first screen the agent sees is determined by the value of the Startup Screen user preference. If this preference has not been set, the agent sees the home page.

The home page is a combination of lists and forms that provide a snapshot of the most important information agents need to manage their day and workload. This information is customizable, depending on the personal preferences of each agent, and may include content such as My Calendar, My Activities, My Service Requests, My Campaigns, and My Contacts.

Agents can change the appearance of the home page by using the controls that appear in the upper-right corner of each list or form. Using the controls, agents can show or hide the detailed records for each content area. They can also use the edit layout function to control what content appears on the home page, and the order in which the content appears. Changes remain in effect until the agent makes new changes.

NOTE: The home page displays only the views for which an agent has permissions, based on their profile.

Figure 1 shows the home page, including lists of service requests, activities, and a calendar for the current user. For more information about how to edit the layout of the home page, see *Fundamentals*.

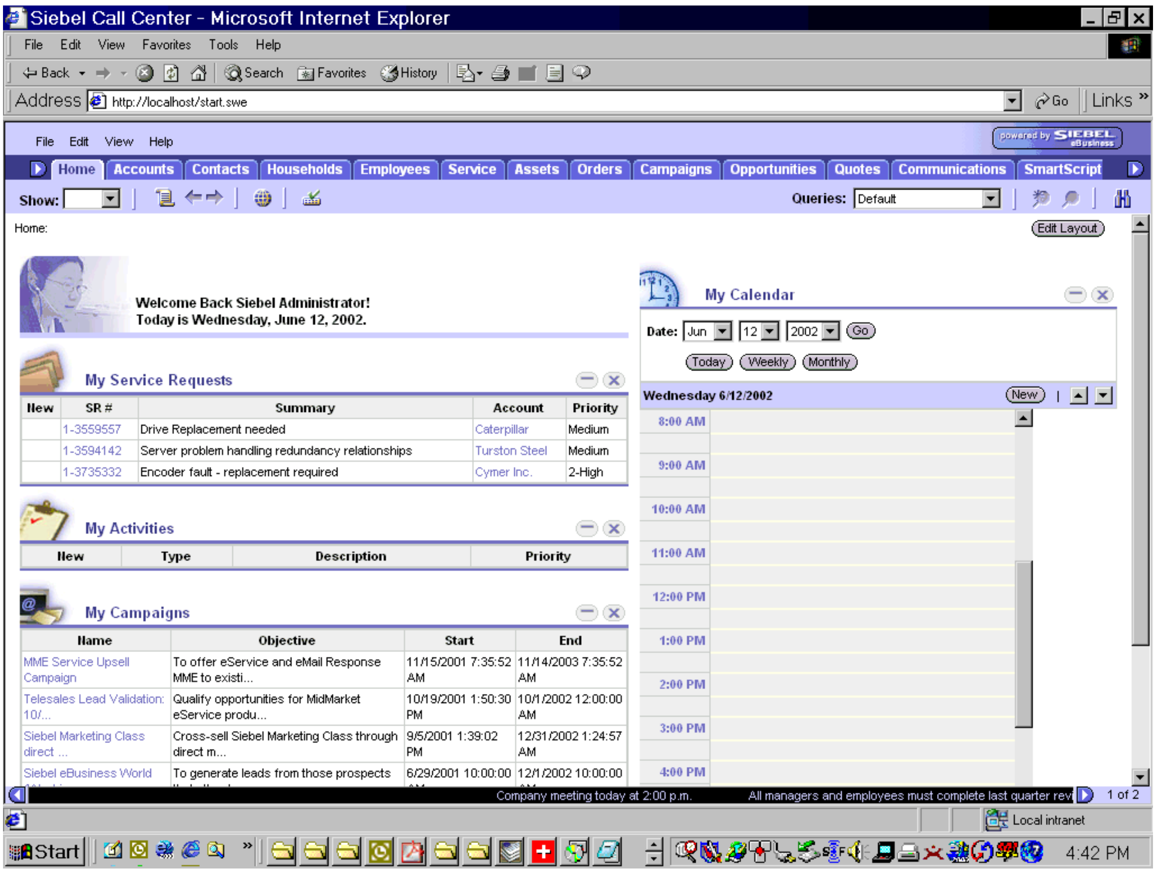

Figure 1. Home Page

Call Center Communications Toolbar

The communications toolbar helps agents to manage inbound and outbound interactions over multiple channels, including voice, email, Web text chat, and wireless.

Using the communications toolbar, agents can initiate outbound work items and accept inbound work items. In addition, agents may place work items on hold or transfer items to other agents using either blind transfer, consultative transfer or conference transfer capabilities.

Agents can also log in to or out of the work queue and set their work mode to ready state to accept incoming work items. The toolbar lets agents manage multiple simultaneous work items including combinations of emails, phone calls, and Web calls.

When a work item is sent to an agent, the Accept Incoming Work Item icon flashes with the appropriate symbol, such as a phone symbol for a phone call. The timer on the left side of the toolbar tracks the handling time for the currently active work item.

Figure 2 shows the communications toolbar. The toolbar includes icons for accepting a work item, initiating a work item, releasing a work item, transferring a call, and so on. It also includes information about how long the active work item has been assigned to you and how long you have been working on it. For more information about the communications toolbar, see *Siebel Communications Server Administration Guide*.

Figure 2. Communications Toolbar

Call Center Message Broadcasting

The message bar provides message broadcasting, a method of communicating information electronically to agents and others. It may display company information or critical statistics from the phone switch, such as the number of calls in the queue or the average call handling time.

The broadcast messages appear as scrolling text in the broadcast bar at the bottom of the application. The arrows at either end of the message bar control the direction in which the text scrolls. Messages can be displayed in different colors to indicate the importance of each message. The information in the message bar can be sent to specific individuals, a group of people, or to all users.

To stop the message bar from scrolling, place the cursor on the message bar. To begin scrolling again, move the cursor away from the message bar.

NOTE: This is the default behavior for the application. It may be changed by an administrator.

A counter, positioned to the right of the message bar, indicates how many broadcast messages there are and which message is scrolling across the screen, for example, 2 of 4. Figure 3 shows the message bar and counter.

Figure 3. Message Bar

Managing the Customer Dashboard

The customer dashboard gives agents quick access to key customer data throughout the life cycle of a call, as well as a persistent region of the page containing the key data as they navigate through the application.

The dashboard displays different information depending on how Siebel Call Center is configured, and which application context is present when the agent populates or updates the dashboard. Figure 4 shows the fields that the dashboard displays when it is populated from the Contacts screen. These fields include Customer Name, Work Phone #, Account, Email Address, and so on.

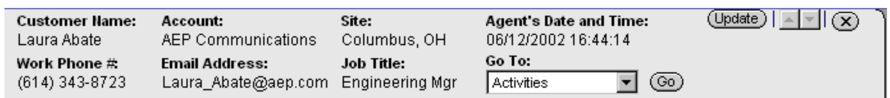

Figure 4. Customer Dashboard Showing Contact Information

The dashboard also provides access to information on assets, activities, entitlements, campaigns, opportunities, orders, service requests as well as information relating to customers and other contacts.

For information about configuring the dashboard, see *Siebel Tools Reference*. For information about configuring communication events or commands to update the dashboard, see *Siebel Communications Server Administration Guide*.

Displaying and Populating the Customer Dashboard

When open, the dashboard appears in the upper frame of the application area. The information displayed in the dashboard can be populated using Siebel CTI, using SmartScript, by clicking the Update button in the dashboard, or by clicking the Set Customer Dashboard button in the Search Center while a contact record is displayed.

NOTE: The dashboard is read-only, and only displays customer information when it is open. Siebel CTI only populates the dashboard when it is open. The dashboard toolbar button opens the dashboard.

As a good business practice, agents should always open the customer dashboard before answering calls, so that the customer information is visible for reference, provided the organization uses Siebel CTI and it is configured to populate the dashboard.

The following procedures describe how to display the dashboard and how to manually populate the dashboard with data.

To display the customer dashboard

Use one of the following methods to display the customer dashboard:

- In the Call Center application toolbar, click the Open Customer Dashboard icon.
- In the application-level menu, choose View > Open Customer Dashboard.

To populate the dashboard with information from the current record

1. Navigate to the screen, view, and record.
2. Display the customer dashboard, as described in "To display the customer dashboard."
3. In the dashboard, click Update to display information from the selected record.

Using the Dashboard for Quick Navigation

The dashboard allows the agent to navigate to information related to data that is displayed in its fields. For example, when the dashboard contains contact information, the agent can use it to navigate to areas of the application that handle activities, activity plans, agreements, assets, campaigns, entitlements, opportunities, orders, and service requests. When the dashboard contains other kinds of information, the agent can navigate to areas that are relevant for the types of information shown.

Transferring Dashboard Information

Under some circumstances, an agent who is handling a customer call can use the communications toolbar to transfer both the call and dashboard information to another agent. In order for the dashboard information to transfer successfully, the agent who receives the transferred call must already have the dashboard open.

Using Search Center

Siebel *Search Center* is a text retrieval tool that lets agents search for information and see the results without losing the data currently shown in the application window. Search Center is the central search hub for call center agents. They can perform broad or exact searches from anywhere within the Siebel application.

Using the Results list in the Search Center, call center agents can attach records to the main record that is active in the application window. For example, a solution record can be attached to a service request. Agents can also preview a result record or make a result record the active record in the application window. Selecting advanced search allows searching across multiple types of information with one search.

Performing a Search

Agents can perform searches to find information, (for example, to search for a relevant solution record), and see the results without losing data.

To perform a search

1. On the application toolbar, click the Search button to open the Search Center.

   The Search button is the binocular icon located in the right side of the screen.

2. Click the Search button.

   The Search Center appears in a frame in the right part of the application window.

3. From the Look In drop-down list, select the type of information you want to find.

   Different fields appear depending on the selection you make.

4. Complete the fields to define your search criteria.

5. Click Search.

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

Working with Result Records

Using the Results list in the Search Center, agents can attach other records to the main active record in the application window, preview records or external documents, and search for a contact and populate the dashboard. For example, they can attach a solution record to a service request.

NOTE: In order for the selected record to be associated with the main record as an attachment, the relationship must be established using Siebel Tools.

To attach a result record

1. In the application window, select the record to which you want to attach the result record.
2. Click the Search button and perform a search to find the record to attach.

   The records that match your search criteria appear in the Results list.
3. In the Results list, select the record to attach.
4. Click the menu button, and then choose Attach.

   The record is attached to the active record in the application window.

Customer Interaction Life Cycle

Interactions between companies and potential or existing customers typically follow a pattern called a life cycle, composed of the following stages:

- **Prospect stage.** Your company has contact information for a prospective customer, but has not determined the prospect's level of interest in your goods or services. Lists of prospects are often rented to companies for limited time periods, during which time prospect data must be kept separate from data on other possible customers who have voluntarily interacted with the company. This information is stored using the Prospect screen.
- **Candidate stage.** Your company has interacted with the prospective customer and has determined that the prospect is interested in doing business with you. At this point, prospect information is typically moved to the storage area for contact information, and the prospect is considered to be promoted to a contact.
- **Qualified stage.** Your company has determined that the contact represents a significant sales opportunity. At this point, an opportunity record is created.
- **Customer stage.** The contact has made one or more purchases from your company. The status of the contact is Active.
- **Inactive stage.** The contact has purchased from your company in the past, but has no current service agreements, and represents no current sales opportunities.
- **Marked for Deletion stage.** The contact information has ceased to be useful, typically because the contact is no longer with the account or household, or because the account no longer exists, or because your company wants no further interaction with that contact, account, or household.

Using Siebel Call Center, you can record the life cycle stage for a contact, an account, or a household, using the Status field in the appropriate screen. By indicating the life cycle stage of the record, you can make decisions on what resources to allocate to interactions with that contact, account, or household. The default Status assigned to a new contact, account, or household record is Active.

Additional information about working with Accounts, Contacts, Households, and Prospects is available in the following sections:

- For information about Accounts, see Chapter 2, "Accounts."

- For information about Contacts, see Chapter 3, "Contacts."
- For information about Households, see Chapter 4, "Households."
- For information about Prospects, see Chapter 5, "Prospects."
- For information about working with Contacts, Prospects, and Opportunities in the specific context of a marketing campaign, see Chapter 12, "Campaigns and SmartScripts."
- For additional information about Opportunities, see *Siebel Sales User Guide*.

Accounts 2

This chapter describes how call center agents can use the Accounts screen to record information about companies and other organizations that interact with your company.

Account information is closely related to information about contacts and prospects, and is similar to information about households. Later chapters in this guide provide more detailed information about how to use the Contacts, Prospects, and Households screens.

Managing Business Data with the Accounts Screen

An account can be a company representing a customer, a prospective customer, a partner, a supplier, or a competitor.

Call center agents can use the Accounts screen to organize and track data when performing the following tasks:

- Creating accounts
- Creating and associating activities with an account
- Associating contacts with an account
- Researching the following kinds of account information:
  - Service Requests
  - Contractual Agreements
  - Product Issues
  - Activity History
  - Account Status

If your organization serves mostly businesses, the Accounts screen is a good screen to use when answering general inbound phone calls. If your organization serves mostly individual consumers, or if you are answering inbound calls related to a marketing campaign, the Contacts screen is a better screen to use when answering inbound calls.

Business Scenario for Accounts

The Accounts screen and views often provide the central navigation point to help call center agents research customers and respond to inbound calls. The type of call determines which view is used by the agent in the application. The following scenarios provide examples of how the Accounts screen is used:

- The call center agent needs to see existing account information, including the products owned by the account, to assist a caller with a service request or to follow up on a service request.
- A caller contacts the call center in response to a sales campaign. Assuming the caller is unknown, the call center agent creates an new account. First, the agent records the account name, address, and other important information. Then, the agent adds a contact or enters other information about the new account. Finally, the agent associates the contact with the campaign that resulted in the call.
- A call center agent wants to enter information about a prospective account. For example, the agent may call a prospective customer to find out if the customer located requested information on the company’s Web site, and whether the customer requires any additional information. The agent adds notes that can be used by a sales representative or schedules follow-up activities to help manage the account relationship.

End-User Procedures for Accounts

This section includes the following end-user procedures for working with the Accounts screen:

- Creating an Account on page 29
- Adding Contacts to an Account on page 34
- Sending Account Information to an External System on page 35

Creating an Account

As a central object for managing customer relationships, an account record must be created for each prospective or customer account before other supporting information can be entered about the account. After an account is created, an agent can begin to add and track important details such as individual contacts, opportunities, and service requests.

To create an account

1. Navigate to the Accounts screen.
2. In the More Info form, click New, and complete the fields for the new record.

   To view additional fields, click the show more button.

   The following table describes some of the fields.

Field	Visible by Default?	Comments
Account Team	Yes	Employees assigned to work with this account. If a call center user is not a member of the Account Team, that user will not receive information about this account during Mobile Web Client synchronization.
Account Type	Yes	Indicates the relationship of the account to your company. Typical values include Customer, Competitor, Consultant, Partner, Vendor, and so on.
Address Line 1	No	First line of account address. This value appears in some Contacts screen views, as well as Account screen views, for contacts that are associated with this account.

Field	Visible by Default?	Comments
Address Line 2	No	Second line of account address. This value appears in some Contacts screen views, as well as Account screen views, for contacts that are associated with this account.
Assignment Area Code	No	Indicates account area code for Siebel Assignment Manager to use when automatically setting attributes such as Account Team memberships. Assignment Manager checks this value for matches to assignment rules.
Assignment Country Code	No	Indicates account country code for Siebel Assignment Manager to use when automatically setting attributes such as Account Team memberships. Assignment Manager checks this value for matches to assignment rules.
Currency	No	Monetary unit to be used in transactions with the account.
Current Volume	Yes	Value of the products and services that a customer has purchased, so far.
Disable Cleansing	No	When selected, prevents data quality cleansing, which verifies that the address is real and standardizes address formatting.
Domestic Ultimate DUNS	No	D&B D-U-N-S (Data Universal Numbering System) number belonging to the highest-level related member within a specific country.

Field	Visible by Default?	Comments
DUNS #	No	D&B D-U-N-S number for the account. If the account has separate operations at multiple sites, this number applies to the current site.
Expertise	Yes	Indicates expertise level or type required by the account. Siebel Assignment Manager checks this value for matches to assignment rules when automatically setting attributes such as Account Team memberships.
Global Ultimate DUNS	No	The D&B D-U-N-S number belonging to the worldwide ultimate parent company of the account.
Industries	No	Types of business engaged in by the account.
Location Type	No	Type of facility operated by the account at the specified site.
Lock Assignment	No	When selected, prevents Assignment Manager from making changes to the Account Team.
Name	Yes	Name of the account.
Organization	No	Organization within your company that is assigned to work with the account.
Parent	Yes	Company of which the account is a subsidiary.
Parent/HQ DUNS	No	D&B D-U-N-S number belonging to the company of which the account is a subsidiary or to the headquarters site of the account.
Parent Site	No	Location of the company of which the account is a subsidiary.

Field	Visible by Default?	Comments
Partner	Yes	When selected, indicates that the account selected represents an external enterprise that is a partner of your company.
PO Approved	Yes	When selected, indicates that the account may use purchase orders to buy goods or services from your company.
PO Auto-Approval Limit	No	Maximum value of goods or services the account can buy from your company using purchase orders, unless further approvals are obtained.
Potential Volume	Yes	Total estimated value of goods and services that a customer will buy.
Price List	No	List of prices to be quoted to this account.
Reference	Yes	Indicates that the account can be used as a reference for potential customers to contact.
Referenceable as of	No	Date the account became a reference.
Shipping Information	No	Text field for any special information about shipping to the account.
Shipping Terms	No	Type of shipping charges to be used with this account.
Site	Yes	Location of the account.
Stage	Yes	Phase customer has reached in the planning and deployment life cycle of the products they have purchased.

Field	Visible by Default?	Comments
Status	Yes	The current stage in the customer interaction life cycle, as described in "Customer Interaction Life Cycle" on page 23. Defaults to Active for a new account record. If set to Candidate, only Account Team members will get information concerning this account during Mobile Web Client synchronization.
Synonyms	No	Text field for alternate names for the account. For example, an account record for International Business Machines might have IBM as an entry in the Synonym field. Helpful when querying or when using Siebel Data Quality.
Territories	No	Sales territories associated with the account.

Adding Contacts to an Account

As agents work closely with prospective or customer accounts, they need to accurately maintain the contacts associated with the account. The following procedure describes how to add one or more new contacts for an account. For information about adding contacts who are not associated with accounts, see "To create a new contact" on page 42.

To add contacts to an account

1. Navigate to the Accounts screen, and select the account in the Accounts list.
2. Click the Contacts view tab.
3. In the Contacts list, add a new record, and complete the fields.
4. Click the hyperlink in the Last Name field to navigate to the Contacts screen to add additional information about the contact.

   For more information about the Contacts screen and available fields for recording contact information, see Chapter 3, "Contacts."

Sending Account Information to an External System

If the Siebel administrator has set up real-time account integration between Siebel Call Center and another system in your organization, you can use the Update External System command to send new and modified account information from Siebel Call Center application to the other system.

By default, in the Accounts screen, the Update External System command triggers the business process Synchronize Account ASI. This business process sends account information to the external system, waits for a response from the external system, and then updates the Siebel database with the response.

The following procedure describes how to send information about an account from Siebel Call Center to another system. This procedure assumes that your Siebel administrator has completed the necessary work to enable real-time account integration through Application Service Interfaces (ASI). For information about ASI structures, see *Application Services Interface Reference*. For information about setting up ASIs, see *Applications Administration Guide*.

To send account and contact information to an external software system

1. Navigate to the Accounts screen, and in the Accounts list, select an account.
2. Click the Contacts view tab, and in the Contacts list, add the contacts that are associated with the account.

   If account contacts are not yet listed, follow the instructions in "To add contacts to an account" on page 39 to specify account contacts.
3. In the Contacts list, click the hyperlink in the Last Name field to display the Contact form and an Activities list for the selected contact.
4. In the Contact form, click the menu button, and then choose Update External System.

   You may observe a slight pause while the information is sent and the response from external system is received.
5. Click the thread bar to return to the Account form.
6. In the Account form, click the menu button, and then choose Update External System.

Siebel Call Center can also receive account credit information from an external system, using the Account Credit Profile view. For more information, see *Siebel Sales User Guide*.

3 Contacts

This chapter describes how call center agents can use the Contacts screen to record information about individuals who interact with your company.

Contact information is closely related to information about accounts and households, and is similar to information about prospects. Other chapters in this guide provide more detailed information about how to use the Accounts, Prospects, and Households screens.

Customer Calls and the Contacts Screen

Contacts are individuals with whom a company does business or expects to do business in the future. The Contacts screen is one of the primary places where agents work when receiving inbound customer calls, particularly for businesses that serve individual consumers. Businesses that serve other businesses may prefer to work in the Accounts screen when receiving inbound customer calls.

These tasks can be performed using the Contacts screen:

- Verifying that a contact is an existing customer
- Creating and maintaining contact profiles
- Recording or viewing information about relationships between individual contacts
- Recording or viewing information about relationships between contacts and accounts
- Recording or viewing information about the relationship between your organization and an individual contact
- Creating activities associated with a contact
- Looking up previous activity or service history for a contact

Business Scenario for Contacts

The Contacts screen and related views help call center agents to assist customers in a timely manner. For example, customers may telephone a call center to place a service request for a product. Agents typically follow these basic steps when a customer calls with a service request:

- Verify that the database contains contact information for the caller
- Gather profile information about the caller and the needed service
- Provide the needed service
- List needed or completed account activities
- Perform any necessary follow-up tasks

End-User Procedures for Contacts

The following sections include end-user procedures for working with the Contacts screen:

- Verifying an Existing Contact on page 41
- Creating a New Contact on page 42
- Profiling a Contact on page 45
- Creating a Service Request for a Contact on page 46
- Adding an Activity for a Contact on page 49
- Sending Contact Information to an External System on page 51

Verifying an Existing Contact

When receiving an inbound call, the first step is typically to verify and locate the caller using the Contacts screen or the Search Center, if the screen is not automatically populated with information. To verify the caller, perform a query in the Last and First Name fields. If the customer is in the system, you can verify the additional contact information, such as account name and address.

To find a contact using the Search Center

1. Click the Search button.

   The Search Center appears in a frame at the right side of the application window.

2. In the Look In drop-down list, select Contacts.

   Several search fields appear, including Last Name, First Name, Account, and CSN (a unique number for each customer). The administrator may configure the search fields differently according to the requirements or needs of your organization.

3. Complete the fields to define your search.

   You can use Boolean operators and keywords that are not case-sensitive.

4. Click Search.

   The records that match your search appear in the Results list. You may also set the dashboard with the contact's information by clicking the Set Customer Dashboard button in the Search window.

5. Click the hyperlink in the Last Name field of the record in the Results list to display the contact record and its related activities.

Creating a New Contact

If the caller's contact information is not already in the system, the information can be added. This procedure is preferred when the contact is an individual consumer who is not associated with an account. For information about creating contacts for specific accounts, see "To add contacts to an account" on page 34.

To create a new contact

1. Navigate to the Contacts screen, and in the More Info form, click New.
2. Complete the necessary fields

   Click the show more button to display additional fields.

   The following table describes some of the fields.

Field	Visible by Default?	Comments
Account	Yes	Business or organization represented by the contact.
Account Status	No	The current stage in the customer interaction life cycle, as described in "Customer Interaction Life Cycle" on page 23. Defaults to Active for a new account record.
Address Line 1	Yes	Automatically populated using the value of Address Line 1 for the account associated with this contact. Separate contact addresses can be entered using the Contacts > Addresses view tab.
Address Line 2	Yes	Automatically populated using the value of Address Line 2 for the account associated with this contact. Separate contact addresses can be entered using the Contacts > Addresses view tab.
Comments	No	Text field for any additional notes you want to record about the contact.
Contact Method	No	Method by which the contact prefers to receive information.

Field	Visible by Default?	Comments
Contact Team	No	Employees responsible for interacting with the contact.
Disable Cleansing	No	When selected, prevents data quality cleansing, which verifies that the address is real and standardizes address formatting.
Employee Flag	No	When selected, indicates that the contact is an employee of your company. Includes the contact in picklists for fields such as Contact Team and Account Team.
Household	No	Residential group or other group of economically affiliated individual consumers to which the contact belongs. Typically used instead of Account if your company's goods and services are being offered to residential groups, rather than to businesses. For more information about households, see Chapter 4, "Households."
Household Status	No	The stage in the customer interaction life cycle, as described in "Customer Interaction Life Cycle" on page 23. Defaults to Active for a new Household record. Automatically populated if Status has been set in Household screen.
Lock Assignment	No	When selected, prevents Assignment Manager from making changes to the Contact Team.
Organization	No	Organization within your company that is assigned to work with the contact.
Registration Source	No	If the contact record was created by a person who entered his or her own contact information at a Web site running a Siebel customer application, this field identifies the application that was used.
Send Email Updates	No	When selected, indicates that the contact has asked to receive product information updates through email.

Field	Visible by Default?	Comments
Site	Yes	Automatically populated with the value of the Site field for the account with which the contact is associated.
Status	No	The current stage in the customer interaction life cycle, as described in "Customer Interaction Life Cycle" on page 23. Defaults to Active for a new contact record.

Profiling a Contact

After verifying the caller's information, agents typically complete a profile. Profiling a contact is the process where an agent gathers additional information about the contact and the contact's specific business or service requirement. The following procedure describes how to enter profile information about a contact.

To add profile information

1. Navigate to the Contacts screen.
2. In the Contacts list, select the contact, and then click the Profile view tab.
3. In the Profile form, complete the necessary fields.

   The following table describes some of the fields.

Field	Comments
Approval Authority	Indicates the maximum purchase amount the contact can approve.
Industry	Type of business engaged in by the contact.
Send Promotions	Indicates that the contact wants to receive promotional material.
Send Quarterly Financials	Indicates that the contact wants to receive quarterly financial reports on your company.

Creating a Service Request for a Contact

The Service Requests view associated with the Contacts screen can be used to view existing service requests or it can be used to add new ones. An agent can determine if a customer has an existing service request related to the issue by using either the Search Center or the Service Request view in the Contacts screen, and then performing a query on the information. For additional information about service requests, see Chapter 6, “Service Requests.”

To create a service request for a contact

1. Navigate to the Contacts screen, and in the Contacts list, locate the customer.
2. Click the Service Requests view tab.
3. In the Service Requests list, click New, and complete the fields.

   The following table describes some of the fields.

Field	Comments
Account	Account the contact is associated with. Automatically populated if there is an existing Account value for the contact.
Last Name	Contact’s last name. Automatically populated.
New	When an asterisk appears in the New field, it indicates that the owner has not modified the service request record since receiving the assignment.
Owner	Person in your company responsible for resolving the service request.
Site	Location associated with the contact. Automatically populated if there is an existing Site value for the contact.
SR #	A unique identifying number for the service request. Automatically populated.
Status	Status of the service request. Defaults to Open.
Summary	Overview of the service request issue.

To add information to a contact's service request

1. Navigate to the Contacts screen, and in the Contacts list, locate the customer.
2. Click the Service Requests view tab.
3. In the Service Requests list, locate the service request, and then drill down on the hyperlink in the SR # field.

   The Service screen appears, showing a Service Request form and an Activities list.
4. In the Service Request form, complete the fields as needed.

   The following table describes some of the fields.

Field	Comments
Agent Closed	Date and time an agent closed the service request.
Agent Committed	Date and time by which the assigned agent promises to resolve the service request, expressed in terms of the agent's local time. May be based on the customer's entitlement for service.
Agent Opened	Date and time an agent created the service request for the customer.
Area	General product or service category that the service request concerns.
Customer Committed	Date and time by which the assigned agent promises to resolve the service request, expressed in terms of the customer's local time. May be based on the customer's entitlement for service.
Customer Opened	Date and time the customer created the service request. Used when the customer requests service through a Web site, rather than by phone.
Priority	Level of effort and urgency the service organization should devote to resolving the service request.

Field	Comments
Severity	Intensity or nature of the problem. For example, a service request concerning a software problem might indicate whether the problem is a typographical error in the user interface, a feature malfunction, a crash, or a crash with data loss.
Subarea	More specific product or service category that the service request concerns. In conjunction with Area, this field is used to help assign the service request to an appropriate owner. The available values for Subarea depend on the value chosen for Area.
Substatus	In conjunction with Status field, provides information about the current stage in the process of addressing the service request.

Adding an Activity for a Contact

After completing a call, an agent often creates an activity record as a reminder to perform a follow-up task for the customer. The following procedure describes how to add an activity from the Contact screen. For more information about Activities, see Chapter 8, "Activities."

To add an activity for a contact

1. Navigate to the Contacts screen, and in the Contacts list, select the contact.
2. Click the Activities view tab.
3. In the Activities list, add a record and complete the fields.

   The following table describes some of the fields.

Field	Comments
Display In	Determines where the selected activity will be listed. Available values are Calendar and Activities, To Do and Activities, and Activities Only. For more information about Activities and the To Do list, see Chapter 8, "Activities." For more information about the Calendar screen, see *Fundamentals*.
Due	Date and time by which the activity should be finished.
New	When an asterisk appears in the New field, it indicates that the owner has not made any modifications to the activity record since receiving the assignment.
Owner	Person responsible for completing the activity.
Start	Date and time by which the activity should start.
Type	Type of activity being scheduled. Defaults to Appointment.

To add information to a contact activity

1. Navigate to the Contacts screen, and in the Contacts list select the contact, and then click the Activities view tab.
2. In the Activities list, select the activity record, and then drill down on the hyperlink in the Type field.

   The Activities screen appears, showing an Activity form and an Attachments list.
3. In the Activities form, complete additional fields as needed.

   The following table describes some of the fields.

Field	Comments
Contacts	Contacts associated with the activity. Automatically populated with the last name of the selected contact. Additional contacts can be added here.
Duration	Estimated time required to complete the activity. If Start and End are specified, Duration is calculated automatically by subtracting End from Start. If Start and Duration are specified, End is calculated automatically by adding Duration to Start.
Employees	One or more employees needed to complete the activity. Automatically populated with the User ID of the person who created the activity.
End	Date and Time by which the activity should end. If Start and End are specified, Duration is calculated automatically by subtracting End from Start. If Start and Duration are specified, End is calculated automatically by adding Duration to Start.
Opportunity	Sales opportunity associated with the activity.

Sending Contact Information to an External System

If the administrator has set up real-time contact integration between Siebel Call Center and another system in your organization, you can use the Update External System command to send new and modified contact information from your Siebel application to the other system.

By default, in the Contacts screen, the Update External System command triggers the business process Synchronize Contact ASI. This business process sends contact information to the external system, waits for a response from the external system, and updates the Siebel database with the response.

For information about sending a combination of account and contact information to a non-Siebel system, see "To send account and contact information to an external software system" on page 35.

The following procedure describes how to send information about a contact from Siebel Call Center to another system. This procedure assumes that the Siebel administrator has completed the work necessary to enable real-time contact integration through Application Service Interfaces (ASI).

For information about ASI structures, see *Application Services Interface Reference*. For information about setting up ASIs, see *Applications Administration Guide*.

To send contact information to an external software system

1. Navigate to the Contacts screen.
2. In the Contacts list, select a contact record.

   Follow the instructions in "To create a new contact" on page 42 to create a new record.
3. In the Contacts record, click the hyperlink in the Last Name field.
4. In the Contact form, click the menu button, and then choose Update External System.

   You may observe a slight pause while the information is sent and the external system's response is received.

Households 4

This chapter describes how call center agents can use the Households screen to record information about groups of individual consumers who interact with the agents' company.

Household information is closely related to information about contacts, and is similar to information about accounts. Other chapters in this guide provide more detailed information about how to use the Contacts and Accounts screens.

Household Contact Tracking

A household is a collection of individual consumers who are economically affiliated and who share common purchasing or service interests. Individuals may or may not be related to one another and may belong to other households. Typically, a household shares the same residential address. Siebel Call Center allows an organization to address the complexity of dynamic households by tracking all household information through the appropriate household contact. If contacts leave a household to join another, their associated information moves with them.

The Households screen displays information about customer households. You can use the Households screen and its related views to work with the following kinds of information:

- Contacts (household members)
- Activities
- Attachments
- Service Requests
- Notes
- Assets
- Opportunities
- Agreements

The Household views summarizes information that relates to all the individual contacts who are members of the household. For example, you might want to view a list of all the service requests from a particular household, regardless of which household member made the request.

The Household More Info view tab and the Household Contacts view tab allow editing, but other Household views are read-only. If you want to add activities, service requests, notes, attachments, assets, opportunities, and agreements, you must navigate to the Household Contact list and click the appropriate contact hyperlink to reach a view where you can enter the necessary information.

Business Scenario for Households

Call center agents commonly use the Households screen in a business-to-consumer setting. Viewing household information allows for cross-selling, upselling, and sell-through opportunities. Combined with Siebel Marketing and Analytics, the Households screen provides the basis for consumer segmentation and analysis.

The Households screen displays market segment information on the household as a whole, as well as a summary of information about the individual contacts who are household members. Call center agents use the Households screen to identify and capture demographic information about a household, and also to review assets, products, activities, and contact information associated with the household. This information helps the agent assess the customer's data and history to better meet the customer's needs.

End-User Procedures for Households

This section describes the following end-user procedures for working with the Households screen:

- Adding a Household Record on page 57
- Adding Contacts to a Household on page 59
- Adding Activities to Household Records on page 62
- Storing and Viewing Information About Households on page 63
- Sending Household Information to an External System on page 65

Adding a Household Record

Use the following procedure to add a household record.

To add a household

1 Navigate to the Households screen.

2 In the Households list, add a record, and then complete the fields.

The following table describes some of the fields,

Fields	Comments
Address	Automatically populated with the address of the primary household contact.
Category	Indicates the value of the household to your organization. Available values are Platinum, Gold, Silver, and Standard.
City	Automatically populated with the city where the primary household contact resides.
Created	Date and time the record was created. Automatically populated.
Created By	User ID of the person who created the record.
Head of Household	The main decision-maker for the household. Available values are all the contacts for the household.
Household #	Unique indentifier for the household. Automatically populated.
Income	Total income from all members of the household.
Name	A name that identifies the household. Typically this is the last name of one or more contacts who are members of the household.
Organization	The organization that interacts with the household.
Revenue	Revenue your organization obtains from this household.
Segment	Indicates general economic class of the household, or home-ownership status. Typical values are White Collar, Blue Collar, Rural, Own Residence, and Renter.
Size	Total number of people in the household.

Fields	Comments
State	Automatically populated with the state where the primary household contact resides.
Status	The current stage in the customer interaction life cycle, as described in “Customer Interaction Life Cycle” on page 23. Defaults to Active for a new household record.
Team	Employees assigned to work with this household. If a call center user is not a member of the household team, that user will not receive information about this household during Mobile Web Client synchronization.
Type	Types of people that make up the household. Typical values include Family - Children, Family - No children, Family - Senior Citizen, and Single.
Wealth	Estimated total wealth of the household.
Zip Code	Automatically populated with the zip code of the primary household contact.

Adding Contacts to a Household

Contacts are individuals associated with a household. Agents can specify one person in the household as the head of household and then identify the others as spouse, child, or dependent parent.

To add contacts to a household

1. Navigate to the Households screen, and in the Households list, select the household to which the contacts will be added.
2. Click the Contacts view tab.
3. In the Contacts list, use one of the following methods to specify the contact you want to add:
   - To add an existing contact to the household, click Add, select the contact from the Add Contacts dialog box, and click OK.
   - To add a new contact to the household, click New.
4. Complete the fields for the record.

   The following table describes some of the fields.

Field	Comments
Alias	Contact’s nickname.
Date Entered	Date that the contact became a member of the household.
Date Exited	Date that the contact left the household.
Employee Flag	Indicates that the contact is an employee of your company.
Income	Contact’s income.
Households	One or more households in which the contact is a member.
Primary	When selected, designates the current contact as the main decision-maker for the household.
Relationship	Indicates the role of the contact within the household.

To specify an address for the household contact

1. Navigate to the Households screen, select the household in Households list, and then click the Contacts view tab.
2. In the Contacts list, select the contact and drill down on the hyperlink in the Last Name field.

   The Contact form and an Activities list appears.
3. Click the Addresses view tab, and in the Addresses list, add a record and complete the fields.
4. Click the thread bar to return to the Household Contacts view, and then scroll down to display the Household Contacts More Info form.
5. In the More Info form, click the select button in the Address field to display the Contact Addresses dialog box.

6 In the Contact Addresses dialog box, select the row and the Primary check box for the contact's main address, and then click OK.

7 In the More Info form, complete additional fields.

The following table describes some of the fields.

Field	Comments
Account	Business or organization associated with the contact.
Address	Contact's address or addresses. The procedure for entering addresses to be displayed in this field is described in Step 2 on page 60.
Email	Contact's email address.
Site	Site of the account associated with the contact.

NOTE: In the Households screen, a contact's address is the residential or personal address. In the Contacts screen, the address displayed in the Contact form and the Contact More Info form is the address of the account associated with the contact. The Addresses view tab for the Contacts screen holds the list where a contact's other addresses can be specified. Household addresses can only be selected from these individual contact addresses.

Adding Activities to Household Records

Add activity records to household records to track appointments, meetings, email messages, and other tasks related to households. The following procedure describes how to add an activity from the Household screen. For more information about Activities, see Chapter 8, "Activities."

To add an activity for a household

1. Navigate to the Households screen, and in the Households list, select the household to which the activity will be added.
2. Click the Contacts view tab.
3. In the Contacts list, select the contact, and then drill down on the Last Name hyperlink.

   The Activities view for the Contacts screen appears.
4. In the Activities list, add a new record and complete the fields.

   The fields are described in "Adding an Activity for a Contact" on page 49.

Storing and Viewing Information About Households

The following types of information can be indirectly related to a household by associating the information with the contact record for any member of the household:

- Attachments
- Notes
- Opportunities
- Service Requests
- Agreements
- Assets

The Household screen’s views that correspond to these types of information are read-only. The information must be stored and modified using Contact screen views.

To store additional information related to a household contact

1. Navigate to the Households screen, and in the households list select the household.
2. Click the Contacts view tab, and in the Contacts list select the household contact with whom additional information will be associated.
3. Click the Last Name hyperlink to display the Contacts screen.
4. Click the appropriate view tab for the type of information you want to add:
   - Attachments
   - Notes
   - Opportunities
   - Service Requests
   - Agreements
   - Assets
5. In the view tab list, add a new record and complete the fields.

If the contact who is associated with Attachments, Notes, Opportunities, Service Requests, Agreements, or Assets leaves the household, the information stays accessible through the Household screen if Siebel Call Center users register the contact's departure by adding an exit date to the Household Contact record. If a user deletes the Household Contact record for the departing contact, the information associated with that contact is no longer associated with the contact's former household.

To view additional information related to a household

1. Navigate to the Households screen, and in the household list, select the household.
2. Click the view tab for the type of information you want to view:
   - Attachments
   - Notes
   - Opportunities
   - Service Requests
   - Agreements
   - Assets

   The corresponding list appears.

Sending Household Information to an External System

If the Siebel administrator has set up real-time household integration between Siebel Call Center and another system in your organization, agents can use the Update External System command to send new and modified household information from your Siebel application to the other system.

By default, in the Households screen, the Update External System command triggers the business process Synchronize Household ASI. This business process sends household information to the external system, waits for a response from the external system, and updates the Siebel database with the response.

The following procedure describes how to send information about a household from Siebel Call Center to another system. This procedure assumes that the Siebel administrator has completed the work necessary to enable real-time household integration through Application Service Interfaces (ASI). For information about ASI structures, see *Application Services Interface Reference*. For information about setting up ASIs, see *Applications Administration Guide*.

To send household and contact information to an external software system

1. Navigate to the Households screen, and in the households list, choose a household.

   Follow the instructions in the procedure “To add a household” on page 57 to create a new household record.

2. Click the Contacts view tab, and choose a contact from the list.

   If household contacts have not yet been added, follow the instructions in “To add contacts to a household” on page 59 to specify household contacts.

3. In the contact record, drill down on the hyperlink in the Last Name field.

   The Contact form and an Activities list appears.

4. In the Contact form, click the menu button, and then choose Update External System.

   You may observe a slight pause while the information is sent and the external system’s response is received.

5. Click the thread bar to return to the Household form.
6. In the Household form, click the menu button, and then choose Update External System.

   You may observe a slight pause while the information is sent and the external system’s response is received.

Prospects 5

This chapter describes the differences between prospects and contacts, and provides an overview of the general process for working with prospect data. It also provides cross-references to sources of further information about prospects.

For information about performing administrative tasks related to list management, including lists of prospects, see *Siebel Marketing Guide*. This chapter assumes that a Siebel administrator has already imported prospect data from an externally obtained list, and has associated prospects with campaigns.

For information about end-user procedures for managing prospects, see Chapter 12, “Campaigns and SmartScripts.”

For information about working with contact data, see Chapter 3, “Contacts.”

Prospect Qualification and Promotion

Prospects are prospective contacts, individuals who are potential customers or who are involved in a business activity in some other way. Prospects may be promoted to contacts, with associated accounts and opportunities.

Organizations usually purchase or rent lists of prospects from third parties with the objective of targeting prospects with offers during marketing campaigns. Because of legal requirements which constrain the use of purchased or rented lists, prospect information is kept separate from contact information, and must be deleted after a specified period of time.

A prospect can be promoted to a contact as soon as the person expresses an interest in doing business with your organization. Legal requirements for what constitutes interest vary, but the following are typical ways for a prospect to qualify as a contact:

- By requesting information from your organization
- By visiting your organization’s Web site
- By visiting your organization’s display area at a trade show
- By expressing interest during an outbound telemarketing phone call

Typically, a call center agent telephones a prospect during a marketing campaign, assesses the prospect’s level of interest in the company’s goods and services, and records the prospect’s response. Depending on the response and the campaign, the agent may modify the prospect's profile information, record the prospect's response, create a follow-up activity, or create an opportunity record for this prospect. Creating an opportunity record automatically promotes a prospect to contact. A prospect can also be promoted to contact without creating an opportunity record. For more information about working with prospects during campaigns, see Chapter 12, “Campaigns and SmartScripts.”

Business Scenario for Prospects

An organization's administrator has imported a list of prospective customers who will be telephoned during the company's Special Holiday Offer marketing campaign. As part of setting up the campaign, the administrator assigns a specified portion of the list of prospects to each of the 20 call center agents. The calls must be made before the end of the month.

A call center agent receives a list of prospects, and begins calling them. For each call the agent notes whether or not the prospect is reached. For each prospect the agent reaches, the agent gathers information about that person's level of interest in the organization's products and services, particularly the items included in the Special Spring Offer.

Depending on the prospect's level of interest, the agent takes any of the following actions:

- Records that the prospect is not interested and proceed to the next call.
- Promotes the record from the Prospect screen to the Contact screen.
- Schedules one or more follow-up activities related to the prospect's interest in the company's goods and services, such as sending correspondence or making an additional call as soon as requested information is available.
- Creates an opportunity record to reflect a situation which may produce revenue. Creating an opportunity record from the Prospect screen automatically promotes the currently selected prospect to become a contact.

Promotion of Prospects to Contacts

If a prospect meets screening criteria, the prospect can be promoted to a contact. When a prospect is promoted, a contact record is created with matching field information, and the prospect is removed from the list of all prospects. The new contact record inherits any activity and campaign response information that was formerly associated with the prospect record. The contact Status is set to Qualified.

If Siebel Data Quality is integrated with Siebel Call Center, and if a prospect that matches an existing contact is promoted, a message is displayed at promotion asking if the existing contact record should be used, or a new contact record created. If the agent chooses to use the existing record, the promotion will not change any account information associated with that record. If the agent chooses to create a new record, account data may be affected as described in the remainder of this chapter, depending on the specific data values involved. For information about data quality matching, see *Siebel Data Quality Administration Guide*.

For all prospect promotions, account Status is set to Qualified. For all prospect promotions *except* those where the user receives a Data Quality message and chooses to use a matching existing contact record, the effect of the promotion on other account data depends on whether the prospect's Account Name and Account Site fields match those of an existing account record. Table 2 shows the outcome for various data combinations.

Table 2. Effects of Prospect Promotion on Account Data

<table>
<tr><th colspan="2" rowspan="2"></th><th colspan="3">Prospect Account Value</th></tr>
<tr><th>Specified and Matches Existing Account</th><th>Specified but Does Not Match Existing Account</th><th>Unspecified</th></tr>
<tr><th rowspan="3">Prospect Site Value</th><th>Specified and Matches Existing Account's Site</th><td>The promoted prospect is associated with the existing account.</td><td>Not applicable</td><td rowspan="2">A new account is created using the prospect's last name as the Account Name value.</td></tr>
<tr><th>Specified but Does Not Match Existing Account's Site</th><td>A new account is created for this account name and site.</td><td>Not applicable</td></tr>
<tr><th>Unspecified</th><td colspan="2">A new account is created using the prospect's personal address as the account address.</td><td>No account is created and no account is associated with the promoted prospect.</td></tr>
</table>

For information about promoting prospects during marketing campaigns, see Chapter 12, "Campaigns and SmartScripts." For information about promoting prospects from administrative screens, see *Siebel Marketing Guide*.

Service Requests 6

This chapter provides information about using Siebel Call Center to record, track, and address customer requests for information or assistance. It incudes procedures for creating a service request record, assigning the service request to an appropriate service representative, associating activities with the request, and closing a request that has been resolved.

Tracking Customer Assistance with Service Requests

A service request (SR) is a customer request for information about, or assistance with, products or services bought from a company. Service request records track customer requests and accompanying responses, and they are the central data object for managing and resolving complex service issues.

Service requests allow agents to create, assign, and manage customer service issues. Service requests provide access to the customer's assets, profile, open issues, related product issues, and service agreement information, and they can include short and extended descriptions of the problem, problem categories, levels of severity and priority, and status tracking with the opening and closing date and time. Each service request can also include many important details such as related activities, related attachments, and relevant solutions.

Use the Service Requests screen to perform the following activities:

- View, create, and update service requests
- Enter information about activities related to a service request
- View information associated with a service request, including attachments, solutions, and decision issues
- Log Change Requests associated with a service request
- Conduct customer satisfaction surveys associated with a service request
- Create and view status of service orders
- View audit trail information for a service request
- View graphical analysis charts of summary service request information

Call Center Service Request Process

Call center agents or customer service representatives typically perform the tasks required to process a service request.

This is an example of a typical service request process.

1. **Receive Incoming Call**. A customer calls to report a problem with a product or service.

2. **Receive and Open Request.** The agent opens a service request, enters or verifies customer and product information, and records a description of the problem.

3. **Verify Service Level and Enter Details.** The agent then checks to see if the customer has a service agreement for the level of service needed to resolve the problem. The agent verifies that the agreement has not expired, and the person on the phone is an approved contact. If the customer does not have the appropriate level of service, the agent cancels the service request and routes the call to the appropriate department.

4. **Assign the Request.** When an agent is unable to resolve the problem over the phone, that agent can route the service request to other agents who have more expertise.

Business Scenario for Service Requests

A customer calls to report that she is having problems installing the software that she purchased from the software organization. The customer service representative (CSR) opens a new service request, enters the customer and product information, and records the customer's description of the problem. The application associates key information with the service request, which gives the CSR access to the customer's profile.

Next, the CSR checks to see if the customer has a service agreement entitling her to the level of service needed to fix this request, verifies that the entitlement has not expired, and the customer is an approved contact. After the entitlement is verified, the committed response time is automatically calculated and appears in the service request.

The CSR is able to resolve the customer's problem, and provides solution details during the telephone conversation with the customer. The customer verifies that the solution is successful, and the CSR sends the customer a technical summary of the problem and the solution for future reference.

Call Center Service Request Cycle

Service requests vary in difficulty, type of resolution, and impact on the organization. The typical service request cycle involves initiating a service request, resolving the customer service issue, and then tracking and analyzing the requests for process improvements.

Customer Requests

Depending on how an organization is structured, agents can receive a service request through many different channels. These channels may include:

- Direct telephone calls, often routed to the agent through an Automated Call Distributor (ACD)
- Email requests
- Internet requests logged automatically by customers over the Internet
- Postings made to user groups

Initiating a Service Request

When opening a new request, certain information is typically necessary to begin processing the request, including:

- Customer name
- Company name
- Nature of the request
- Product or asset name

Based on the information gathered from the customer, the agent can determine how to proceed with the request.

Identifying the Customer

When a customer telephones a call center or service center, the agent must determine if the caller is an existing or new customer. To verify a customer, go to the Contacts or Accounts screen and perform a query on the information about the customer. This query may also be performed through the Search Center.

If the customer exists in the system, the agent can review the requests that have already been entered for this customer. If the customer does not already exist in the system, the agent can add the customer.

NOTE: For customers using the Siebel Communications Server, this customer search can take place automatically when the call is received, presenting the agent with relevant contact information through an automated screen pop.

Creating a New Service Request

For new service issues, the agent enters the service request from the Service screen.

To create a service request

1. Navigate to the Service Requests screen and select All Service Requests from the Show drop-down list.
2. In the Service Requests list, create a new record.
3. Complete the fields and save the record.

Verification of Service Entitlements

Agents determine if a customer is entitled to service by navigating to the Service screen's More Info view and clicking the Verify button.

The Pick Entitlements dialog box displays a list of entitlements. If nothing appears in the Entitlements list, it could mean one of two things:

- The customer has not contracted to receive support
- The customer has used the allotted entitlements

If there are entitlements listed in the dialog box, select an entitlement and click OK.

NOTE: The Entitlements screen and view are read-only. To enter information, use the Agreements screen. For more information on agreements and entitlements see *Siebel Field Service Guide*.

Providing Service Request Details

After an agent has confirmed the customer's entitlements and initiated a service request, he or she must enter the details so the service request can be processed and the issues resolved.

To supply details to an open service request

1. Navigate to the Service Requests screen, and from the Show drop-down list, select All Service Requests.

2. In the Service Requests list, select the service request and drill down on the SR # hyperlink.

   NOTE: If you have already verified the customer's entitlement, you should already be on the service request, and do not have to follow steps 1 through 3.

3. In the Service Requests form, complete the necessary fields, and then save the record.

NOTE: The Siebel application is configured to prevent users from deleting service requests to protect historical data.

Assigning the Service Request

A service request is assigned to an agent after the details have been entered, and it has been determined that the issue cannot be resolved by the receiving agent.

There are two methods for assigning a service request:

- Manual assignment
- Assign with assistance

Manually Assigning Service Requests

Service requests can be assigned to other agents who have the expertise to resolve the particular service issue. Service requests can also be reassigned to balance the workload among agents.

To assign a service request manually

1. Navigate to the Service Requests screen, and from the Show drop-down list select All Service Requests.
2. In the Service Requests list, select the service request.
3. Click the More Info view tab, and in the Owner field, click the select button.
4. From the Pick Service Request Owner dialog box, select the person to whom the request will be assigned, and then click OK.
5. Save the record.

Using Assignment Manager to Assign Service Requests

The assign with assistance method requires an agent to use Assignment Manager. Assignment Manager automatically designates a customer service representative or call center agent based on skill level and availability.

To assign a service request with assistance

1. Navigate to the Service screen, and from the Show drop-down list, select All Service Requests.
2. In the Service Requests list, select the service request to assign.

3. Click the More Info view tab, and in the More Info form, click the menu button and choose Assign.

NOTE: Assignment Manager either automatically assigns the service request to a representative or presents a list of potential assignees based on skills and other rating criteria. If the list of eligible assignees appears, select one and close the assignment window.

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4. In the Employees dialog box, query for the agent to whom the SR will be assigned, and click Assign.
5. Save the record.

Associating Activities with a Service Request

After creating the service request and supplying the product information, an agent can associate follow-up activities with the service request to assist the customer and close the request in a timely manner.

To associate activities with a service request

1 Navigate to the Service Requests screen, and from the Show drop-down list select All Service Requests.

2 In the Service Requests list, select the service request, and then click the Activities view tab.

3 In the Activities list, add a record.

4 In the record, complete the fields, and then save the record.

NOTE: Activities cannot be updated, and new activities cannot be appended to a closed service request.

Closing a Service Request

After an agent has added the solution to the service request, the request can be closed, indicating to other agents that the problem is resolved.

An agent may resolve an open service request based on existing solutions. The solution is often attached to the service request for use by other agents in resolving similar service issues. For more information, refer to Chapter 7, “Solutions and Resolution Searching.”

To close a service request

1. Navigate to the Service screen, and from the Show drop-down list select My Service Requests.
2. In the Service Requests list, select the service request.
3. In the Status field, choose Closed from the drop-down list.
4. Save the record.

NOTE: When selecting Closed, the system automatically sets the Sub Status field to Resolved and includes the current date and time in the Closed field.

Solutions and Resolution Searching 7

This chapter describes how to locate information that may help to resolve service requests, the process of storing this type of information for use with future service requests, and how to make the information available to customers searching for solutions online.

Solutions as a Service Request Research Tool

After the service request is assigned to a customer service representative (CSR), the assigned CSR begins to research a solution to the problem.

The Solutions screen allows agents to store, organize, associate, and search items in the knowledge database. The knowledge database categorizes and stores successful resolutions to similar problems, and provides published workarounds to common problems.

After successfully resolving a problem, the CSR can associate the solution with the service request as a reference. Associated solution can be made available to customers who used the call center or a self-service eService Web site to check the status of service issues. Associating the solution to the service request also makes it possible to resolve similar service requests without performing extensive research.

Business Scenario for Solutions

A customer service representative researches a service request by investigating Related SRs, Decision Issues, and by using the Search Center to find relevant resolution documents such as white papers, articles, or technical documentation.

After the CSR locates an appropriate resolution document, the representative previews the information, and then the CSR selects associates the document with the service request as an attachment. The next time a CSR encounters a similar service issue, the solution document is available to help with the resolution process.

Researching and Using Solutions

The first step in finding a solution to a service request is to determine if a solution exists for this problem or a problem with similar attributes.

Customer service representatives can add a new solution, or view an existing solution to a service request using the Service Request screen's Solutions view.

Searching for Related Solutions Information

CSRs can search all solutions for related information using the Solutions screen. Records that match the criteria appear in the Solutions list and are returned in order of relevance to your query criteria. Click the record navigation buttons to view each record in the result list.

To manually search for a solution from the Solution screen

1. Navigate to the Solutions screen, and from the Show drop-down list, select All Solutions.
2. In the Solutions list, click Query, and then define your query criteria by completing the fields.
3. Click Go to run the query.

Associating a Solution with a Service Request

After a solution for a service request is located, or a new solution is created, the solution is associated with the service request.

To associate a solution with a service request

1. Navigate to the Service Requests screen, and from the Show drop-down list, select All Service Requests.
2. In the Service Requests list, query for the service request, and then click the Solutions view tab.
3. In the Solutions list, add a record.
4. In the Add Solutions dialog box, query and select the solution, and then click Add.
5. Save the solution record.

Using Search to Locate Service Solutions

After verifying that the service request is an active record, the customer service representative researches the SR using Search.

To search for a solution using the Search

1. Click the Search button.

   The Search dialog box appears in a frame in the right part of the application window.

2. From the Look In drop-down list, select the type of information you want to find.

   For example, you may select Smart Answer. Different fields appear depending on the selection you make.

3. Complete the fields to define your search criteria.
4. Click Search.

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

5. Select the relevant solution, and click Preview to view the information.

Adding New Solutions to the Database

The administrator, or a customer service representative with the appropriate responsibility can add new solutions to the database for others to use.

To manually add a solution

1. Navigate to the Solutions screen, and from the Show drop-down list, select All Solutions.
2. In the Solutions list, add a record and complete the fields.
3. Save the solution.

Adding Activities to Service Requests

After the customer service representative has successfully resolved a service request, the CSR associates the research and work with the service request as activities.

To add a activity to a service request

1. Navigate to the Service screen, and from the Show drop-down list, select My Service Requests.
2. In the Service Request list, click the Activities view tab.
3. In the Activities list, add a record and complete the fields.
4. Save the activity record.

NOTE: If dedicated activity plans are set up, Activity Plans can be used instead of individual activities. For more information on activities, refer to Chapter 8, "Activities."

Adding Attachments to an Activity

While working with a list of activities, agents can click the Activity Type hyperlink which provides more detail about the activity. The activity form contains details about the activity. The Attachment list offers access to external references or files related to the activity. These files can be copied into the Siebel application.

To add an attachment to an activity

1. Navigate to the Service screen, and from the Show drop-down list, select My Service Requests.
2. In the Service Requests list, select the service request, and then click the Activities view tab.
3. In the Activities list, add a new record, and then click the hyperlink in the Type field.

   The Activities form appears, with the Attachments view tab selected as the default.
4. In the Attachments list, add a new record, and then in the Attachment Name field, click the select button.
5. In the Add Attachment dialog box, click the Browse button.
6. In the Choose file dialog box, navigate to the file, and then click Open.
7. In the Attachments list, save the attachment.

Activities 8

This chapter describes the use of activity records in Siebel Call Center, primarily for tracking tasks related to service requests. For information about tracking tasks that are related to marketing campaigns, see Chapter 12, "Campaigns and SmartScripts."

Activities functionality is closely related to Calendar functionality, which is described in *Fundamentals*.

Activities and Templates

Activities are tasks that are required or have been performed for the customer. In a customer service environment, activities are often associated with a service request and represent steps taken to resolve a customer issue. Activity templates are available representing predefined groups of sequential activities required to resolve or diagnose specific issues. These templates provide a quick method of creating consistent activity sequences representing best practices for addressing customer issues.

Activities are also used to represent tasks in nonservice situations such as scheduling and recording meetings, appointments, and interactions with customers and prospects. If one task leads to follow-up tasks, it is possible to associate follow-up activity records with a parent activity record.

Activities can be viewed in several different locations, including the following:

- **My To Do List in the Activities screen.** This list shows all the user's activities, regardless of status. Access this list by navigating to the Activities screen and choosing My To Do List from the Show drop-down list.
- **My To Do's in the Calendar screen.** This list displays a subset of the data displayed in the My To Do List in the Activities screen, activities that have not been completed. For general information about using the Calendar screen, see *Fundamentals*.

Business Scenario for Activities

A service department representative use the Activities screen to manage personal tasks and tasks associated with contacts, service requests, solutions, accounts, and opportunities.

After reviewing a to-do list in the Calendar screen, the service representative notices that the first scheduled activity is to follow up on a faxed service request from a customer account requesting a solution to a problem.

Because the service team uses activities to track the service request progress for the account, the service representative is able to prepare for a follow-up phone call by reviewing past activities associated with the customer.

The service representative notes that since the last phone call, another representative has sent literature which solves the company's problem. The service representative prepares for the follow-up call based on this information. As team members accomplish their activities, they mark them as done, providing key status information. After speaking with the customer the service representative logs an activity, records the details of the conversation with the customer, and then closes the request.

End-User Procedures for Activities

As agents work with activities to resolve customer service issues, consider these suggestions:

- Determine if work has already been performed to resolve the request
- Record new activities performed to help resolve the request
- If appropriate, use an existing activity plan with a proven sequence of activities to help resolve the request
- As activities are completed, set the activity's status to Done.

The following sections include information about working with activities:

- Researching a Service-Related Activity on page 95
- Adding an Activity to a Customer Request on page 96
- Assigning an Activity to a Team Member on page 98
- Using an Activity Plan to Resolve Customer Issues on page 100
- Associating a Follow-Up Activity with a Parent Activity on page 101
- Sharing Activity Information on page 102

Researching a Service-Related Activity

For existing service requests, agents can quickly research the history of related activities using the Service Requests screen. The Activities Detail view provides a comprehensive set of completed and scheduled activities for the service request.

To view existing activities for a service request

1. Navigate to the Service Requests screen, and from the Show drop-down list, select My Service Requests.
2. In the Service Requests list, select the service request, and then click the Activities view tab.

   The Activities list represents every scheduled task for the selected service request as well as the service request history.
3. In the Activities list, select the activity, and then drill down on the hyperlink in the Type field.

   The Activity form and Attachments list appear. You can view additional details about the activity, or add additional details, such as supporting attachments using either the form or the list.

Adding an Activity to a Customer Request

When working with a service request, the agent must record all research and other work performed to resolve the request. This comprehensive history can be helpful to others working with the particular service request, contact, or account. It also forms a valuable resolution record that may be used by others in the future to avoid duplication of effort.

Activities related to a service request are recorded on the Service Requests screen.

To add activities to a service request

1. Navigate to the Service Requests screen.
2. From the Show drop-down list, select My Service Requests.
3. In the Service Request list, select the service request, and then click the Activities view tab
4. In the Activities list, add a record, and complete the fields.

   An activity number is automatically generated. The account and contact information are automatically entered from the information in the selected service request.

   The following table describes some of the fields.

Field	Comments
Account	Account that requested service. Automatically populated based on the Account value of the selected service request.
Attachments	Indicates whether there are attachments associated with this activity. This field does not appear by default in the Service Activities view, but can be displayed through the use of the Columns Displayed command.
Description	Brief note describing the needed or completed activity.
Display In	Determines whether the activity will be displayed in the Activity screen, in the Activity screen and the Calendar screen, or in the Activity screen and the To Do applet. An activity cannot appear in both the Calendar and the To Do applet. Defaults to Calendar and Activities.
Due	Date and time by which the activity should be completed.

Field	Comments
Employees	One or more employees assigned to complete the activity. Defaults to the User ID of the activity creator. This field is not displayed by default in the Service Activities view, but can be displayed through the use of the Columns Displayed command, or by clicking the Type hyperlink to navigate to the Activities screen.
New	Automatically selected when ownership is changed from the activity creator to another user. Automatically cleared when the new owner views activity details by clicking the hyperlink in the Type field.
Owner	User ID of the person assigned to complete the activity. Defaults to the User ID that created the activity.
Priority	Importance of the activity.
Private	When selected, the activity becomes visible only to the users listed in the Employees field and the Siebel administrator. This field is not visible by default in the Service Requests Activities view. It can be displayed by changing the Columns Displayed settings or by clicking the Type hyperlink to navigate to the Activities screen, and then clicking the show more button.
Start	Date and time when the activity should start.
Status	Current status of the activity.
Type	General category of the activity. Defaults to a hyperlink with the value of Appointment. Clicking the hyperlink displays the Attachments view of the Activities screen, where the value of Type can be changed and additional activity characteristics can be specified.

Assigning an Activity to a Team Member

When creating a new activity, it may be necessary to assign it to another team member who handles specific requests or types of tasks. When the activity is assigned it appears in the assigned user's My Activities list.

NOTE: When the Category field for an activity is set to certain specific values, any existing entries are automatically cleared from the Owner and Employee fields, in order to let Assignment Manager select the best available resources for the activity. The Category and Employee fields are not visible by default in the Service Requests Activities view, but both are visible in the Activities screen when the show more button has been clicked for the Activities form or More Info form. The specific Category values that clear the Owner and Employee fields are Diagnostic, Field Engineer Activity, Other, Preventive Maintenance, and Repair Activity.

The following procedure describes how to assign an activity manually.

To assign or reassign an activity

1. Navigate to the Service screen, and from the Show drop-down list, select All Service Requests.
2. In the Service Requests list, select the service request associated with the activity you want to assign.
3. Click the Activities view tab.
4. In the Activities list, select the activity you want the representative to be reassigned or assigned to, or create a new one, as described in "To add activities to a service request" on page 96.
5. In the Type field, click the hyperlink to display the Activities Attachments view.
6. In the Activities form, click the show more button.
7. In the Employees field, click the select button.

8 In the Employees dialog box, select the record of an employee who is already listed, or add another employee to the list by completing the following substeps:

  a In the Employees dialog box, click New.

  b In the Add Employees dialog box, select the employee you want to associate with the activity, and then click OK to return to the Employees dialog box.

9 Select the Primary field for the employee you want to assign the activity to, and then click OK.

In the main window, both the Employees field and the Owner field display the new value.

NOTE: The Owner value can also be entered or selected directly in the Owner field. If you use either of these methods, any previously assigned Owner is deleted from both the Owner and Employee fields, and the new Owner is automatically added to the Employee field as Primary.

Using an Activity Plan to Resolve Customer Issues

An activity plan defines the activities needed to implement a project or goal, or to resolve issues that frequently occur. For example, if a service-oriented activity plan is associated with a service request, the plan might include standard set of activities required to resolve the SR.

Activity plans use activity templates that establish the list of activities to be completed. Activity templates, created by administrators, may have various levels of details pertinent to each member of a team, such as requisitioning parts and tools, steps involved in the service activities, or special directions or instructions. For information about activity plan administration, see *Applications Administration Guide*.

After an agent chooses an activity plan, the steps are in place to help the agent diagnose and resolve the customer's issues, and the agent can move to the next customer call. Either an administrator or Assignment Manager can assign the activities to the appropriate users.

To add activities associated with an activity plan

1. Navigate to the Service screen, and from the Show drop-down list, select My Service Requests.
2. In the Service Request list, select the service request, and then click the Activity Plans view tab.
3. In the Activity Plans list, add a record, and in the Template field, select the appropriate activity template for the service request.
4. In the Planned Start field, enter the start date and time for activities related to the service request.
5. Save the Activity Plan.

   Activities associated with the plan are automatically generated and appear in the Activities subview.

Associating a Follow-Up Activity with a Parent Activity

Any activity may be associated with a parent activity. For example, an activity such as a conference call might result in a number of follow-up activities. To record the relationship, the conference call activity would be specified as the parent activity for each of the follow-up activities.

To associate a follow-up activity with a parent activity

1. Navigate to the Activities screen, and in the Activities list, select the child activity.
2. In the Parent Activity field, click the select button.

   If necessary, click the show more button in either the Activity form or the More Info form to display the Parent Activity field.
3. In the Activities dialog box, query to locate and select the parent activity, and then click OK.

Sharing Activity Information

An agent can grant permission to other users to view the agent's activity records. These users may also have permission to create, modify, and delete the agent's activity records. The following procedures describe how to grant this permission, and how to work with other activity records that you have permission to view or modify.

NOTE: A user can modify or delete a specific activity record if anyone who is listed in that activity's Employee field has granted that user permission to modify and delete activities.

To grant permission for another user to work with your activity records

1. Navigate to the Calendar screen, and from the Show drop-down list, select Calendar Access List.
2. In the Calendar Access list, click New.
3. In the Add Employees dialog box, query to locate and select the employee to whom you want to grant access, and then click OK.

   For more information about Query, see *Fundamentals*.
4. Select the check box in the Allow Updates field.

   Selecting the check box allows the user to modify, delete, and add activity records for you.

   If you want the user to be able to view your activity records, but not modify the records, make sure the Allow Updates check box is *not* selected.

The following procedure describes how to work with another user's activity records, if that user has granted you permission to do so.

To work with another user's activity records

1 Navigate to the Activities screen, and from the Show drop-down list, select Others' Activities.

2 In the drop-down list in the header of the Activities list, select the user whose activities you want to work with, and then click Go.

If the user accessing the records has been granted permission to add and modify these records, the New button in the Activities list is available, and the user can work with these records as though they were his own. If the user has *not* been granted permission to make changes, the New button is inactive.

RMAs and Service Orders 9

This chapter describes how to handle service requests that involve returning products for replacement, refund, or repair.

Depending on the nature of an organization’s business, successful resolution of customer service issues may often require the creation of a service order or return merchandise authorization (RMA). Before an item can be returned, the organization usually requires a return authorization. The RMA authorizes the return and initiates the process by which the customer receives a replacement item, refund, or repair. Service orders (SOs) do not necessarily require returned merchandise, but do require the ordering of service products or service packages defined by the support organization.

Multiple types of customer return service orders are supported:

- RMA advance exchange is supported when a replacement part is shipped immediately and the defective part is returned later
- RMA repair and return is supported when the defective part is received and repaired and then shipped back to the customer
- RMA return is supported when the defective or good part is received but no replacement or repair is required

The call center agents have immediate access to all order handling and bill information for each shipment, and can enter and track RMAs, as well as service orders.

Business Scenario for RMAs and Service Orders

A customer contacts a retail organization to return or repair an item that was purchased from the company.

The service representative creates a service order specifying the type of service transaction that is required, as well as information on pricing and requested shipment dates.

After receiving an RMA from the service representative, the customer may perform any of the following actions:

- The customer returns a part for repair, and the part is fixed and returned to the customer.
- The customer returns a part, and the service department sends the customer a replacement part.
- The call center agent contacted by the customer dispatches a service representative to replace the part.

Processing a Return Order

If the customer must return the item for repair or replacement to close the service request, the service representative must authorize the return. The RMA allows the customer to receive a replacement item, refund, or have their item repaired.

To process a return order

1. Navigate to the Service Requests screen, and from the Show drop-down list, select My Service Requests.
2. In the Service Requests list, select the service request associated with the return, and then click the Orders view tab.
3. In the Orders list, add a new record and complete the fields.

   The Type field indicates what actions must be performed for this service transaction. Examples are RMA Return, Repair Order, Sales Order.

   The Status field default to Pending; change the status as necessary. The Site field is automatically completed when associated with an account.
4. Save the order record.

Generating a Service Order

When generating a service order, each part number or individual service product is treated as a separate line item.

Adding Line Items

A new record must be created for each line item.

To add a line item to an order

1. Navigate to the Service Requests screen, and from the Show drop-down list, select My Service Requests.
2. In the Service Requests list, select the service request to which the line item will be added, and then click the Orders view tab.
3. In the Orders list, click the Order # hyperlink of the order to which you wish to add.

   The Line Items list and Totals form appear with the Service Order form.
4. In the Line Items list, add a record, complete the fields, and then save the record.

   The Line #, Sequence, and Qty fields default to 1 and the Status field defaults to Pending. Modify the values in these fields as needed.

Approving an RMA to Complete the Order

Agents must approve an RMA before it can be processed.

To approve an RMA

1. Navigate to the Service Requests screen, and from the Show drop-down list, select My Service Requests.
2. In the Service Requests list, select the service request, and then click the Orders view tab.
3. In the Orders list, select the order for which the RMA will be approved.
4. In the Order record, select the check box in the Approved field, and save the record.

   If the Approved field is not visible, click the menu button, choose Columns Displayed, and add the Approved field.

Quality and Change Requests 10

This chapter describes ways to record information about product quality and to track requests for changes to product functionality. It includes information about associating change requests with service requests, activities, and attachments.

Change Management and the Quality Screen

Organizations can track change requests related to products, service requests, and solutions, and manage the change process using the Quality screen.

Service professionals can record change requests against a product or a specified component of a product, allowing the organization to assess the quality of a product. Using change management, product managers can prioritize problems, identify problem trends, correct defects during any stage of the product cycle, and estimate correction costs.

Change management also keep customers current about the status of defect corrections and schedules for replacement products.

Use the Quality screen and corresponding views to:

- Create, manage, and maintain change request records
- Create and view the activities associated with a change request
- Keep customers informed about schedules for fixing and replacing defective products
- View change requests associated with service requests
- Create and view attachments associated with change requests
- View a comprehensive change request history for a product
- View charts to review important change request status information in a graphical format
- Create solutions and associate them with product change requests

Business Scenario for Quality and Change Requests

Product quality information can be used by the service organization to help diagnose and resolve customer problems. For example, if a product has a known defect, this information needs to be documented in a place that can be used by others.

When a customer calls with a problem, the service representative can look up any related quality issues that may be contributing to the customer needs, often reducing the time spent researching and resolving the problem. If a resolution is not available, any work performed to resolve the issue is captured in the associated activities list. This change request and activity history is used to keep the customer informed of the request status, and the resolution.

Tracking quality issues also helps an organization discover possible problem areas. For example, if customers are calling with a common complaint about a product, the organization will know immediately that a problem exists and can implement a timely solution.

Associating a Change Request with a Service Request

Associating a new change request with an existing service request that documents a product defect helps the organization assess the impact the defect is having on customers.

To associate a change request with a service request

1. Navigate to the Service screen, and from the Show drop-down list, select My Service Requests.
2. In the Service Requests list, select the service request, and then click the Change Requests view tab.
3. In the Change Requests list, click New.
4. In the Add Change Request dialog box, select the change request, and then click Add.
5. In the Change Request record, update the Type, Status, and Severity fields if necessary, and then save the record.

Managing Changing Requests

The Quality screen can be used to consistently track and augment the important information associated with a change request. If a change request related to the issues does not exist, a new change request is created to keep the information in the system current. Attachments and activities views are used to provide additional information about a change request.

Adding a Change Request

Use the following procedure to create a new change request to associate with a service request.

To add a new change request

1. Navigate to the Quality screen, and from the Show drop-down list, select My Change Requests.
2. In the Change Request list, add a new record, and then complete the fields.
3. Save the change request.

   The new change request can be associated with service requests, products, and solutions.

Associating Activities with a Change Request

It is important to track the activities taken to resolve a change request.Recording activities associated with a change request keeps service request progress information current.

To associate activities with a change request

1. Navigate to the Quality screen, and from the Show drop-down list, select My Change Requests.
2. In the Change Request list, select the change request, and click the Activities view tab.
3. In the Activities list, add a record and complete the necessary fields.
4. Save the activity record.

Associating Attachments with a Change Request

When researching and resolving a change request, an agent might find external reference material and related documents, such as repair logs or email messages that they want to associate with the change request. Associating related material to the change request keeps the relevant information in one location.

To associate attachments with a change request

1. Navigate to the Quality screen, and from the Show drop-down list, select My Change Requests.
2. On the Change Request list, select the change request, and then click the Attachments view tab.
3. In the Attachments list, add a new record.
4. In the Attachment record, click the select button in the File field.
5. In the Choose file dialog box, locate and select the file, and then click Open.

   If you want this document to be updated as changes are made to the original file, select the Update File check box.
6. Save the attachment record.

Siebel eMail Response and Send eMail 11

This chapter describes two kinds of email functionality that call center agents can use:

- Replies to inbound eMail Response messages
- Email messages created using the Send Email (F9) command

The procedures presented in this chapter are divided into three sections:

- Procedures that apply only to eMail Response replies
- Procedures that apply only to Send Email messages
- Procedures that apply to both eMail Response replies and Send Email messages

For information about administering eMail Response and Send Email, see *Siebel eMail Response Administration Guide* and *Siebel Communications Server Administration Guide*.

Siebel eMail Response and Customer Communications

Email has become a popular channel through which customers communicate their needs to organizations. Siebel eMail Response prepares an agent to respond to a high volume of inbound email. It routes inbound emails to the most appropriate agent based on the same business logic available for routing other types of customer communications.

Agents can view their inbound email queues at a glance and then, for each message, they can view related customer, account, service request, and opportunity profiles, as well as any attachments. Templates are available for use in the solutions database to compose customized replies to inbound emails.

Send Email Command Options

Using the Send Email command, call center agents can send email messages from any context within Siebel Call Center. Depending on how the Siebel administrator has configured the application, an agent can use context-specific email message templates to improve efficiency and standardize replies for types of communications that frequently occur.

Siebel Call Center supports individual user choice regarding the software used for Send Email. The software options are:

- Send Email window for Siebel applications
- User's preinstalled Microsoft Outlook email client
- User's preinstalled Lotus Notes email client

The choice of software is determined by the value of the Email Client user preference setting in Siebel Call Center. For information about setting this preference and using the Send Email command, see "End-User Procedures for Send Email" on page 129.

For information about supported versions of Microsoft Outlook and Lotus Notes email client software, see the system requirements and supported platforms documentation for your Siebel application. Release notes and system requirements and supported platforms documentation for all Siebel applications can be found on Siebel SupportWeb at http://ebusiness.siebel.com/supportweb/.

Business Scenario for eMail Response

A call center agent works at a site where customer services are available in several languages. The agent must answer incoming phone calls, resolve existing service requests, and answer inbound eMail Response messages. Beginning with an open service request from the previous day, the agent uses the Send Email command to ask a coworker for information regarding a technical issue.

By default, the organization uses the standard Siebel email client for Send Email messages generated within Siebel Call Center, but the agent prefers to use Lotus Notes and typically opens that software before logging in to Siebel Call Center. Because the agent's user preferences in Siebel Call Center specify Lotus Notes as the default email client, the Send Email command does not display the standard Siebel email client window. Instead, when the agent uses the Send Email command, the agent must click the Lotus Notes icon in the task bar to display the Lotus email client window where a new message can be created.

The agent uses the address book to select the recipient, and then chooses a message template. The recipient works in a division of the organization that is located in a different country, where a different language is used for daily business. The agent sending the email is fluent in both the language used at the local call center and the language used at the recipient's call center. Because the agent frequently handles business in both languages, she has set her user preferences to give her access to email templates in both languages. The agent chooses an appropriate template in the recipient's language, then composes and sends the message.

End-User Procedures for eMail Response

This section includes the following end-user procedures for working with eMail Response:

- Setting Communications Preferences for eMail Response on page 120
- Replying to an Inbound Email on page 122
- Adding a Solution to Email on page 125
- Creating a Service Request from an eMail Response on page 126
- Associating Opportunities with eMail Response Replies on page 128

Setting Communications Preferences for eMail Response

This section describes how to set user preferences specifically for eMail Response. Additional user preferences that affect both Send Email and eMail Response are discussed in "End-User Procedures for eMail Response" on page 119.

To set Outbound Communications preferences for eMail Response only

1 From the application-level menu, choose View > Site Map > User Preferences > Outbound Communications.

2 In the Outbound Communications form, complete the fields in the Email Response section of the form, and save the record.

   The following table describes some of the fields.

Field	Comments
Default Closing Template	Specifies a communications template (for the email channel) to use as a closing for an email reply sent using Siebel eMail Response. The template content is inserted automatically into the message. It is placed after the last text you enter, but before the thread ID and the original message, if the original message is included.
Default Greeting Template	Specifies a communications template (for the email channel) to use as a greeting for an email reply sent using Siebel eMail Response. The template content is inserted automatically at the beginning of the message.
Default Message Format	Specifies the type of formatting to use for outbound email messages that are replies to inbound eMail Response messages. Available values are HTML and Plain Text. For more information about HTML formatting, see "Using HTML Controls in Call Center Outbound Email" on page 142.

Field	Comments
Include Original Message in Reply	When selected, automatically includes the current eMail Response message in the body of any reply to that message. Includes source, destination and subject information from the header of the eMail Response message.
Remain on Same View After Send (Cancel)	When selected, continues to display the Incoming Message form, Incoming Attachments form, and Outgoing Message form after a reply to an eMail Response message is sent, but populates the forms with data from the next record in the current Communications list. When not selected, shows the Communications list after a reply to an eMail Response message is sent.

There is one additional user preference that affects eMail Response only, the Always Check Spelling Before Sending preference. For information about setting this preference, see "Setting Spell Check Preferences" on page 137.

Replying to an Inbound Email

Agents can perform the following tasks when they are replying to an inbound eMail Response message:

- View inbound email and associated information
- Create a reply
- Find and insert a solution or template
- Attach a file
- Attach literature
- Check the spelling and send the reply
- Associate an email message with a new or existing contact, service request, or opportunity

The following procedure describes how to view inbound eMail Response messages and associated information.

To view inbound email and associated information

1. Navigate to the Communications screen, and the Show drop-down list, select My Communications or All Communications.
2. In the Communications list, select the email, and then click the hyperlink in the field for the type of information you want to view:
   - To display Contact information, click the hyperlink in the Last Name field.
   - To display Service Request information, click the hyperlink in the SR # field.
   - To display Opportunity information, click the hyperlink in the Opportunity field.
3. Click the More Info tab to view additional information about the email.

   For example, the Message Sent field shows the time the email was sent by the sender, and the Message Received field shows the time the email was processed by the Communications Inbound Manager.

The following procedure describes how to reply to an inbound eMail Response message.

NOTE: The following procedure is appropriate for a user who is working in any screen in the application. However, if the user is replying to a number of eMail Response messages, it is not necessary to navigate to the My Communications view for each message. If the user has just replied to another eMail Response message, the Outgoing Message form, Incoming Message form, and Incoming Attachments list are still displayed, but the forms are populated with data from the next email in the user's My Communications queue. In this case, the user can begin typing in the Outgoing Message form immediately, without returning to the My Communications view.

To reply to an inbound eMail Response message

1. Navigate to the Communications screen, and from the Show drop-down list, select My Communications.
2. In the Communications list, select the email to which you want to respond, and then click Reply.

   The Outgoing Messages form appears, the Incoming Messages form appears, and the Incoming Attachments list appears.

   NOTE: If you navigate to the Outgoing Message form by clicking the Subject field hyperlink in the My Communication view, instead of by clicking the Reply button, then you must click Reply in the Outgoing Message form before working on the reply message.

3. In the Outgoing Messages form, select the appropriate greeting from the drop-down list.

   The greeting text is inserted at the beginning of your reply.

4. In the Outgoing Messages form, select the appropriate category from the drop-down list.

5. If the system is set up to use SmartAnswer, the Category field will be automatically populated with a percentage value indicating the highest confidence level for applicability to the current message. Systems without SmartAnswer display all the available categories in the drop-down list sorted alphabetically and preceded by a hyphen. The choice of category will determine the templates and solutions that are available. In the Outgoing Messages form, select the appropriate body template or solution from the drop-down list, if the choice of category makes templates available.
6. Enter the message text in the message composition field.
7. In the Outgoing Messages form, select the appropriate closing from the drop-down list.
8. Click Spell Checking, correct any errors, and then click Done.
9. Click Send to send the message.

   To add more information to the message by attaching a known solution, see "Adding a Solution to Email" on page 125.

   To associate the message with a particular service request, see "Creating a Service Request from an eMail Response" on page 126.

   To associate the message with a particular opportunity, see "Associating Opportunities with eMail Response Replies" on page 128.

NOTE: If you need to exit the Outgoing Messages form before sending the reply, be sure to click Cancel first. If you do not click Cancel, Siebel Call Center will store a draft of the outbound communication even though you did not send it. To view drafts for unsent email, navigate to the All Communications or My Communications screen, select the email, and from the predefined Queries list, choose drafts.

Adding a Solution to Email

After the CSR resolves the customer's inquiry, the CSR adds the solution to the email using the Search Center.

NOTE: This procedure assumes that your Siebel administrator has set up the Search Center to support searches that examine solutions.

To add a solution using the Search Center

1. Follow Step 1 through Step 8 of "To reply to an inbound eMail Response message" on page 123.
2. Click the Search Center button.
3. In the Look In drop-down list, select Solutions.
4. In the Search Center form, complete the necessary fields, and then click Search.
5. Select the solution, and then click Preview to inspect the solution.
6. Close the preview window and then click Attach.

   The solution is attached to the body of the email reply, immediately above the copy of the incoming message.
7. When you are ready to send the message, click Send.

   NOTE: Templates and solutions can be chosen for eMail Response replies either from the Outgoing Messages Form, or from the Search Center, provided that the Outgoing Messages Form is the active window when the Search Center is used. If Search Center is used, more solution and template choices may be available than from the Outgoing Messages form. For a given template choice, either method of choosing the template produces the same results. For a given solution choice, using the Search Center causes the solution to be attached to the eMail Response reply, and using the Outgoing Messages form causes the solution to be copied into the body of the eMail Response reply.

Creating a Service Request from an eMail Response

If an agent decides that an inbound eMail Response message is a service request, the agent can use the following procedure to create a service request record that is automatically populated with information from the email message. When this has been done, additional email interactions in the same email thread are also tracked as being associated with the service request.

To create a service request from an eMail Response message

1. Navigate to the Communications screen, and from the Show drop-down list, select My Communications.
2. In the Communications list, select the email for which you want to create a service request.
3. In the Pick Service Request dialog box, click New to display a Pick Service Request form populated with data from the email message.
4. In the Owner Group field, click the select button to display the Pick Service Group dialog box.
5. Select a group and click OK to return to the Pick Service Request form.
6. Click Save to return to the Pick Service Request dialog box.
7. Click OK to create the service request and return to the main window.

The following procedure describes how to associate an outbound reply with a service request, if no service request association has been inherited from the original the inbound message.

To associate a service request with a reply

1 Follow Step 1 through Step 8 of "To reply to an inbound eMail Response message" on page 123.

2 In the Outgoing Messages form, click the select button in the in the SR # field.

3 In the Pick Service Request dialog box, use one of the following methods to associate the reply with a service request

- To associate the reply with an existing service request, select the service request you want to associate with the email message, and then click OK.
- To associate the reply with a new service request, click New to display a Pick Service Request form, optionally complete the Owner Group field, click Save, and then click OK.

4 When you are ready to send the message, click Send.

Associating Opportunities with eMail Response Replies

An agent can also associate an opportunity with any reply to an eMail Response message. This informs sales representatives about the status of an outstanding issue for the account, so the sales effort can be adjusted appropriately. As with service requests, if an agent associates an eMail Response reply with an opportunity, additional email interactions in the same email thread are automatically associated with the same opportunity.

To associate an opportunity with a reply

1 Follow Step 1 through Step 8 of "To reply to an inbound eMail Response message" on page 123.

2 In the Outgoing Messages form, click the select button in the Opportunity field.

3 In the Pick Opportunity dialog box, use one of the following methods to associate an opportunity with the reply.

- To associate an existing opportunity with the reply, select the opportunity, and then click OK.
- To associate a new opportunity with the reply, click New, enter a name for the Opportunity, and then click OK.

4 When you are ready to send the message, click Send.

End-User Procedures for Send Email

The following procedures are included in this section:

- Setting Outbound Communications Preferences for Send Email on page 129
- Using the Send Email Command on page 132

Setting Outbound Communications Preferences for Send Email

This section describes how to set user preferences that only affect the Send Email command. Additional user preferences that affect both Send Email and eMail Response are discussed in "End-User Procedures for eMail Response" on page 119.

To set Outbound Communications preferences for Send Email

1. From the application-level menu, choose View > Site Map > User Preferences > Outbound Communications.
2. In the Outbound Communications form, complete the fields in the Send Email section of the form, and save the record.

3 The following table describes some of the fields.

Field	Comments
Default Message Format	Specifies the type of formatting to use for outbound email messages that are sent using the Send Email command. Available values are HTML and Plain Text. For more information about HTML formatting, see “Using HTML Controls in Call Center Outbound Email” on page 142.
Default Profile	Specifies the default communications profile for a user to use for the Send Email and Send Fax commands. The profile stores various communications settings and provides access to the communications driver that transfers information between the Siebel software and the email/fax server. For example, a profile for the Internet SMTP/POP3 Server driver handles outbound communications using the SMTP protocol. You have access to any profiles that are associated with your Siebel responsibility setting, and to any profiles that you create for your personal use by using the My Profiles view in the Communications screen. The ability to create personal communications profiles is not available for some responsibility settings. The default profile information is copied to the From field in the Send Email and Send Fax windows. You can specify a different profile by choosing another value from the drop-down list for the From field.

Field	Comments
Default Recipient Class	In some contexts, the Send Email and Send Fax commands let you choose email or fax recipients from data stored in certain fields of the current record. If you choose a recipient based on one of these current field values, the Default Recipient Class setting specifies the default choice for where recipient email or fax address information will be populated in the outbound message. Choices are To, Cc, and Bcc. For example, you might generally want to populate recipients to the To field. However, depending on your typical activities or workflow and on your company's business needs, it may be more appropriate to populate recipients to the Cc or Bcc field instead of the To field.
Email Client	Determines which of the following will be used when the Send Email command is selected: ■ Send Email window for Siebel applications ■ Microsoft Outlook email client ■ Lotus Notes email client
Siebel/Lotus Form	Specifies the user's preferred outbound email form when Email Client is set to Lotus Notes, if the user prefers a default form other than the form specified by the Siebel administrator at the server level. For information about creating outbound forms, see *Siebel Communications Server Administration Guide*.

Field	Comments
Siebel/Outlook Form	Specifies the user's preferred outbound email form when Email Client is set to Microsoft Outlook, if the user prefers a default form other than the form specified by the Siebel administrator at the server level. For information about creating outbound forms, see *Siebel Communications Server Administration Guide*.
Upon Sending Messages Generate	Specifies activity generation for messages sent using the Send Email, Send Fax, Send Wireless Message, and Send Page commands. Options are: ■ No Activity. No activity record is generated by sending an outbound message. ■ Private activities. Sets the Internal flag to TRUE for an activity record generated by sending an outbound message, so that only the message sender can view the activity record. ■ Public activities. Sets the Internal flag to FALSE for an activity record generated by sending an outbound message, so that the activity record can be viewed by other users, in addition to the message sender. The specific results of the Internal flag being set to FALSE or TRUE depend on your Siebel implementation. Consult your Siebel administrator for more information.

Using the Send Email Command

The Send Email command can be used from any screen in Siebel Call Center, and from many screens in other Siebel applications. In different contexts, different email templates can be selected from the Send Email dialog box, to standardize and improve efficiency for recurring types of communications.

Each call center user can set a user preference to determine the type of software that responds to the Send Email command. By default, the Send Email command displays the standard Send Email dialog box for Siebel applications. However, if Microsoft Outlook or Lotus Notes email client software is installed on the user's workstation, a user preference can be set to display the Microsoft Outlook email client window or the Lotus Notes email client window, depending on which software is present.

The standard functionality of the selected email client software is available while the email message is composed and sent. If the selected email client software is Microsoft Outlook or Lotus Notes, a copy of the message is placed in the user's folder for sent messages. The window for the individual message closes when the message is sent, but the email client software remains running in the background until closed.

For information about how to set the Email Client user preference, see "Setting Outbound Communications Preferences for Send Email" on page 129.

For information about the specific versions of Microsoft Outlook and Lotus Notes that are supported, see the system requirements and supported platforms documentation for your Siebel application. Release notes and system requirements and supported platforms documentation for all Siebel applications can be found on Siebel SupportWeb.

The following procedure describes how to send an email message using the Send Email window for Siebel applications.

To use the Send Email command

1. From any screen in Siebel Call Center, choose File > Send > Email from the application-level menu, or press the F9 key.

   A Recipient/Template dialog box may appear, depending on the actions you take.

2. If the Recipient/Template dialog box is displayed, complete the fields, which may include the following, and then click OK:

   - A recipient for the message, based on a current record value.

   - A template for the message, based on the current screen, view, language, and locale. Click Change Language/Locale to change these settings, which may affect available templates.

- An optional literature item or other file attachment. You will also have the option of adding attachments from the email client window that appears next.

NOTE: If you need to close the Recipient/Template dialog box before sending the email message, be sure to click Cancel, rather than the X-shaped Close icon in the upper right corner of the dialog box. If you click the Close icon instead of Cancel, Siebel Call Center may record an activity even though the email is never sent.

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3 Use one of the following methods to complete and send your email message:

- If you are using a third-party email client, complete and send the email according to the provider's instructions.
- If you are using the Send Email window for Siebel applications, complete the fields.

  The following table describes some of the fields.

Field	Comments
From	Automatically populated with the value of the Default Profile setting in the Outbound Communications view of the User Preferences screen.
To:	Email addresses for one or more intended recipients. In some contexts, this field is automatically populated with data from the currently selected record. When the To button is clicked, the address dialog box appears, listing contacts, prospects, and employees. *If you select a record in the address book, be sure to select the check box in the To field before you click OK.* If the selected record contains a valid email address, that address appears in the To: field of the Send Email window.
CC:	Optional. Email addresses for additional recipients. When the Cc button is clicked, the address dialog box is displayed. *If you select a record in the address book, be sure to select the check box in the CC field before you click OK.*

Field	Comments
BCC:	Optional. Email addresses for additional recipients. Addresses for BCC recipients are hidden from other recipients. When the Bcc button is clicked, the address dialog box is displayed. *If you select a record in the address book, be sure to select the check box in the BCC field before you click OK.*
Subject	Optional. Ordinarily indicates the general topic discussed in the email you are sending, or the purpose of the email. In some contexts, this field is automatically populated with data from the currently selected record or the selected email template.
Body	Text of the email being sent.
Attachments	Lists files that are attached to the email you are sending. Automatically populated based on your selections in the Attachments dialog box. For information about attaching a file to an email message, see "Adding Attachments, Literature, and URLs to Email" on page 139.

4 When you are ready to send the message, click Send.

End-User Procedures for eMail Response and Send Email

This section describes the following end-user procedures for working with both eMail Response and Send Email functionality:

- Setting Shared Outbound Communications Preferences on page 136
- Setting Spell Check Preferences on page 137
- Setting Spell Check Preferences on page 137

Setting Shared Outbound Communications Preferences

The outbound communications preferences that are shared by eMail Response and Send Email are related to situations where call center agents communicate with customers and other contacts using multiple languages. For information about configuring Siebel software to use multiple languages, see *Global Deployment Guide*.

To increase efficiency for call center agents who communicate with customers in multiple languages, user preferences can be set to filter the list of available email templates based on language and locale. For example, an agent uses both English and French to communicate with customers. If the Language user preference is set to French, French email templates are listed when the user selects an email template.

The Locale user preference provides a way to distinguish between templates that are appropriate for different countries that use the same language. For example, you might want templates for France and for Quebec to contain different contact information.

For information about how to associate individual email templates with specific Language and Locale settings, see *Siebel Communications Server Administration Guide*.

For information about outbound communications preferences that affect only eMail Response functionality, see "Setting Communications Preferences for eMail Response" on page 120. For information about outbound communications preferences that affect only Send Email functionality, see "Setting Outbound Communications Preferences for Send Email" on page 129.

To set shared Outbound Communications preferences

1. From the application-level menu, choose View > Site Map > User Preferences > Outbound Communications.
2. In the Outbound Communications form, complete the fields in the form; some fields are described in the following table.

Field	Comments
Language	Specifies the Language that will be used for filtering available email templates. If Language is not specified in this user preference setting, the application inherits the Language setting of the Siebel Object Manager. The user can still select the Language at run time for individual email messages.
Locale	Specifies the Locale that will be used for filtering available email templates. If Locale is not specified in this user preference setting, the application inherits the Locale setting of the Siebel Object Manager. The user can still select a Locale at run time for individual email messages.

3. Click Save.

Setting Spell Check Preferences

Siebel Spell Check can be used with the Siebel eMail Response application and the Send Email, Send Fax, Send Page, and Send Wireless Message features.

Siebel Spell Check dictionaries are available in several languages. All language dictionaries are installed regardless of the default language selected during installation. You can change your Spell Check default language in User Preferences.

An agent can add words to a custom dictionary. Custom user dictionaries are stored on the server so you can use any available workstation and still have access to the entire dictionary.

To change default spell check options

1. From the application-level menu, choose View > User Preferences.

   The Profiles view appears.

2. In the Profiles view, select Spelling from the Show drop-down list.

3 In the Spelling form, make the necessary changes, and save the form.

The follow table describes options. The changes take effect the next time an agent uses spell check.

Spell Check Preference Field	Default	Description
Ignore UPPERCASE Words	Off	When off, spell check questions words in all caps, such as SMTP or CD and asks whether they are correct.
Ignore Mixed Case Words	Off	When off, spell check questions words such as eMail and asks whether they are correct.
Ignore Internet Names	Off	When off, spell check questions words such as support@siebel.com and http://www.siebel.com/
Ignore HTML Tags	On	When on, spelling is not checked for any text enclosed in angle brackets (< >) or any text that follows an unmatched left angle bracket (<).
Ignore Words with Digits	Off	When off, spell check does not questions words such as POP3.
Always Check Spelling Before Sending	Off	When off, spell check does not check the spelling of the email body when the agent clicks Send. Applies to eMail Response reply messages. Does not apply to Send Email messages.
Report Capitalization Errors	On	When on, spell check questions capitalization errors such as PLEase.
Default Spell Checking Language	Installation language	The current default language dictionary used to check spelling. The initial default language is the language specified during the Siebel system installation. Agents may change their default language at any time. A new default spell checking language will take effect the next time an agent invokes spell checking.

Adding Attachments, Literature, and URLs to Email

To assist a customer with a problem, you can add helpful literature and other attachments to outbound email messages that are sent using either eMail Response functionality or the Send Email command and the Siebel Mail Client.

NOTE: If you are using the Send Email command with the Microsoft Outlook email client or the Lotus Notes email client, the Recipient/Template box appears when you select Send Email, before the Microsoft or Lotus window is displayed. This dialog box allows you to specify literature items to include with the email message you are about to create.

You can add more than one literature item or other attachment to an outbound email message. All currently attached files, including literature files, are listed in the dialog box that appears when you click the paper clip icon. However, only the most recently attached file is listed in the Attachments field.

Adding Attachments to Email

The following procedure describes how to add an attachment to an outbound email message.

To add an attachment to an outbound email message

1. In the Outgoing Messages form or Send Email form, click the paper clip icon to the right of the Attachments field.
2. In the Attachments dialog box, select the attachment you want to add.
3. If the file is not listed in the dialog box, click New.
4. In the File Name field, click the select button.
5. In the Add Attachment dialog box, click Browse.
6. In the Choose File dialog box, select the file, and then click Open.
7. In the Add Attachment dialog box, click Add.
8. In the Attachments dialog box, click Save, and then click Close.

   The attachment appears in the Attachments field.

Adding Literature to Email

The following procedure describes how to add literature to an outbound email message.

To attach literature to an outbound email message

1. In the Outgoing Messages from, click the Add Literature button.
2. In the Pick Literature dialog box, select the literature you want to attach and then click OK.

Adding a URL to Email

You can attach a Web page URL to an outbound email message so that the email recipient sees the URL in the body of the email message. Depending on the software the recipient uses to read email, the URL may or may not be an active hyperlink to the designated Web page. The Web page itself is not attached. The following procedure describes how to add a URL to an outbound email message.

To add a URL to an outbound email message

1. Use one of the following methods to start composing an outbound email message:
   - To compose an eMail Response reply, choose View > Site Map > Communications > My Communications from the application-level menu, select the email message to which you want to respond, and click Reply.
   - To compose a Send Email message, press the F9 key or choose File > Send > Email from the application-level menu.
2. Compose your email message as usual.
3. Click the paper clip icon that appears to the right of the Attachments field.

   The Attachments dialog box appears.
4. Click New.
5. In the File Name field, click the select button to display the Add Attachment dialog box.

6. In the URL field, enter the URL you want to include in your email message, and then click Add to return to the Attachments dialog box.

7. Click Save, and then click Close.

   The URL appears in the Attachments field. The email recipient will see the URL at the end of the body of your email message, after your text and any thread ID or original message that you include. If the applicable Default Message Format user preference is set to Plain Text, "http://" will be added automatically to the beginning of any URL that does not already include it.

Using HTML Controls in Call Center Outbound Email

Siebel Call Center includes support for HTML formatting in email messages that are viewed or composed using Siebel Call Center.

For inbound email messages that include HTML formatting, the Web browser that is used to run Siebel Call Center automatically determines how the HTML formatting will be displayed. For example, if you use a browser that supports the <BOLD> tag, Call Center shows bold text for all email text located between the <BOLD> tag and the </BOLD> tag.

For outbound email, the following Outbound Communications user preferences determine whether the message will be sent in plain text or using HTML formatting:

- eMail Response Default Message Format
- Send Email Default Message Format

If the appropriate preference is set for HTML formatting, special editing controls are available in the form where you compose your email message. These controls allow you to use supported HTML formatting, and also provide some standard editing features such as cut and paste.

For information about setting Outbound Communications user preferences, see "Setting Communications Preferences for eMail Response" on page 120 or "Setting Outbound Communications Preferences for Send Email" on page 129.

Using Editing Controls for Email Response Replies

The following procedure describes how to use the special editing controls that are available for eMail Response replies or Send Email messages when the corresponding Default Message Format preference is set to HTML.

To use special editing controls for outbound email with HTML formatting

1. Set the appropriate outbound user preference to use HTML formatting, as described in "Setting Communications Preferences for eMail Response" on page 120 or "Setting Outbound Communications Preferences for Send Email" on page 129.

2. Use one of the following methods to start composing an outbound email message:
   - To compose an eMail Response reply, choose View > Site Map > Communications > My Communications from the application-level menu, select the email message to which you want to respond, and click Reply.
   - To compose a Send Email message, press the F9 key or choose File > Send > Email from the application-level menu.
3. In the Outgoing Message form or Send Email form that appears, click in the text composition area located below the Body field.

   The special editing controls appear at the bottom of the field.
4. Compose your message using the special editing controls as needed.

   For detailed information on using the editing controls, see *Fundamentals*.

Campaigns and SmartScripts 12

This chapter provides background information and procedures for using Siebel Call Center in marketing campaigns. It includes information about making outbound calls, accepting inbound calls, using call guides and SmartScripts, recording sales opportunities and other responses, promoting prospects to contacts, and evaluating campaign effectiveness.

Campaigns Overview

Campaigns are focused efforts to create opportunities that eventually result in sales. Siebel Call Center helps you implement planned campaigns by providing the following functionality:

- Stores information about the contacts and prospects targeted by the campaign
- During campaign calls, shows information about special offers or other sales inducements to call center agents or telesales representatives, so they can provide the information to potential customers consistently and professionally
- Stores information about the outcomes of campaign calls
- Transfers campaign-generated information about sales opportunities to sales representatives

Campaigns can be conducted by making outbound calls or by receiving inbound calls. Inbound calls can come in response to advertisements, direct mailings, or other communication methods. For information about planning campaigns, see *Siebel Marketing Guide*.

Campaigns work in conjunction with customer telephony integration to automatically call the customer on the list when executing an outbound campaign or to pop-up the appropriate campaign and customer information when taking inbound calls for a campaign.

During a campaign call, an agent typically performs the following tasks:

- Verifies existing information about the current contact or prospect
- Gathers additional information about the current contact or prospect
- Communicates current offers to the contact or prospect
- Records whether or not the contact or prospect represents a sales opportunity

The following sections of this chapter provide detailed information about how to accomplish these tasks. For more information about contacts, see Chapter 3, “Contacts.” For more information about prospects, see Chapter 5, “Prospects.”

Business Scenario for Campaigns

As part of an effort to increase visibility and generate more revenue from July through September, a software company is conducting a campaign in the Western region to gather information from potential customers who have accessed the company’s Web site. The goal of the campaign is to make sure potential customers can find the information they are looking for on the Web site.

The campaign begins with a list of individuals who clicked the More Information button on the company’s Web site. The call center agents begin calling these potential customers, and following each call, they update the customer information, note the result of the call, and generate business leads for the sales department. Information is derived from the answers given by each potential customer to a series of questions.

Based on the answers given, the agent marks the potential customer’s record as information only, no interest, or promote to opportunity. If there is an opportunity, the agent creates an opportunity record and begins profiling the opportunity by asking a series of questions about the customer's needs.

Understanding Campaigns

This section provides overview information that you will need to understand the instructions provided in the "Making Outbound Campaign Calls" section. This section assumes that you are already familiar with the information in Chapter 3, "Contacts," and Chapter 5, "Prospects."

Call Guides and SmartScripts

During campaign calls, whether inbound or outbound, agents often use call guides or SmartScripts to make sure that the information given to the contact or prospect is correct, complete, and professionally delivered.

A call guide is prepared text that the agent can read or reference during the call. A SmartScript is a more flexible method of directing communication during a call—the agent asks a series of specific questions, and the SmartScript suggests different follow-up questions and statements depending on how the contact or prospect responds to each question.

Call guides and SmartScripts are prepared as part of campaign planning. For information about planning campaigns and creating call guides, see *Siebel Marketing Guide*. For information about creating SmartScripts, see *Siebel SmartScript Administration Guide*.

For information about using a call guide during a campaign call, see "To use a call guide during a campaign call" on page 153. For information about using a SmartScript during a campaign call, see "To use a SmartScript during a campaign call" on page 155.

Campaign Response Types

When a campaign is planned, the campaign is assigned a response type. The response type affects the availability of certain buttons in Campaign views, and it is used to indicate the level of detail that agents are expected to gather for certain kinds of campaign responses. Table 3 lists the purposes of each response type, and the buttons that are available for that type in the Campaign Overview view and the Campaign Contacts/Prospects view.

Table 3. Response Type Purposes and Button Availability

Response Type	Purposes	Available Buttons
Opportunity	■ Record detailed information about campaign responses that represent sales opportunities. ■ Record minimal information about campaign responses that do not represent sales opportunities. This can be done in the Campaign Overview view or the Campaign Contacts/Prospects view, without switching to the Responses screen.	■ Create Opportunity ■ View Responses
Response	■ Record detailed information about all campaign responses, whether or not they represent sales opportunities. ■ Especially appropriate for campaigns that are not expected to result in immediate sales opportunities, such as campaigns to encourage attendance at an upcoming event, or campaigns that survey existing customers on questions not directly leading to sales.	■ Create Opportunity ■ Create Response ■ View Responses

Attachments, orders, and products can be associated with either response or opportunity records. Campaigns of either response type can be set to create a response record, automatically, when an agent creates an opportunity record. Marketing managers and campaign managers use these response records to evaluate the performance of the campaign. The following paragraphs provide more detail about how agents typically interact with each response type.

Response Campaigns

When a Response campaign is in progress, the agent normally works in the Overview view of the Campaigns screen. When a contact or prospect is successfully reached, the agent clicks Create Response to display the Response screen, where detailed information about the level of interest of the contact or prospect can be recorded. After recording the response, the agent clicks the thread bar to return to the Campaigns Overview.

Opportunity Campaigns

When an Opportunity campaign is in progress, the agent also normally works in the Overview view of the Campaigns screen. When a contact or prospect is successfully reached, the agent determines the level of interest of the contact or prospect, then uses one of the following options to record the outcome:

- To record a sales opportunity, the agent clicks Create Opportunity, to display the Opportunity screen, where detailed information can be recorded. After recording the opportunity, the agent clicks the thread bar to return to the Campaigns Overview view. Clicking Create Opportunity automatically selects the Done check box in the Campaigns Overview view.
- To record anything except a sales opportunity, the agent continues to work in the Campaign Overview view, choosing appropriate settings for the Status and Call Outcome field. When finished, the agent selects the Done check box and proceeds to the next Contact or Prospect record.

Provided that the campaign has a Primary Offer, either manual or automatic selection of the Done check box automatically creates a Response record. When this occurs, the value of the Outcome field in the Campaign Overview is automatically mapped to an equivalent value in the Response Type field in the Response record. If there is no Primary Offer for the campaign, no Response record is created.

The following sections describe typical campaign tasks performed by call center agents:

Making Outbound Campaign Calls

The following procedure describes how to make an outbound call to a campaign contact or prospect. To communicate offers using call guides or SmartScripts, see "Making Offers Using Call Guides" on page 153, and "Making Offers Using SmartScripts" on page 154. To record responses for both Response and Opportunity campaign types, see "Recording Campaign Opportunities" on page 156.

NOTE: The following procedure uses the Campaign Overview view during outbound campaign calls. If you prefer, you can use the Campaign Contacts/Prospects view, instead.

To make an outbound campaign call

1. Navigate to the Campaigns > My Campaigns view.

   The Campaigns list displays active campaigns with which you are associated, based on the Start and End Dates of the campaigns.

2. In the Campaign list, select the campaign for which you want to make outbound calls.

3. Click the Overview view tab.

4. Select the record of the campaign contact or prospect to call.

5. If you are using the Siebel communications toolbar, click the Make Call icon on the toolbar to place the call. Otherwise, use standard techniques to place the call manually.

6. Depending on whether your campaign uses a call guide or a SmartScript, refer to the appropriate procedure for communicating campaign offers to the current contact or prospect:

   - If your campaign uses a call guide, see "To use a call guide during a campaign call" on page 153.

   - If your campaign uses a SmartScript, see "To use a SmartScript during a campaign call" on page 155.

Answering Inbound Campaign Calls

The following procedure describes how to answer an inbound campaign call.

To answer an inbound campaign call

1. Identify the caller and the campaign to which the caller is responding.
2. Use Siebel Search to determine whether the caller is already listed in the database, as either a contact or a prospect, and then follow one of the following procedures:
   a. If the caller is already listed in the system:
      - Click the Last Name hyperlink in the Search Center result to navigate to the Contact or Prospects screen, and then click the Campaigns view tab.
      - Use the Campaigns list to determine whether the caller is already associated with the campaign that prompted the call.
      - If the association does not already exist, click New and specify the campaign name to create the association.

   b. If the caller is not listed in the system:
      - Navigate to the Contacts screen, create a record for the caller in the Contacts list, and then click the Campaigns view tab.
      - In the Campaigns list, click New and specify the campaign name to create the association.
3. In the Contacts Campaigns list, click the Campaign hyperlink for the relevant campaign to navigate to the Campaigns screen.
4. Click the Overview view tab, and then select the record for the caller from the Overview list.
5. Depending on whether your campaign uses a call guide or a SmartScript, refer to the appropriate procedure for communicating campaign offers to the current contact or prospect:
   - If your campaign uses a call guide, see "To use a call guide during a campaign call" on page 153.
   - If your campaign uses a SmartScript, see "To use a SmartScript during a campaign call" on page 155.

Making Offers Using Call Guides

The following procedure describes how to use a call guide to communicate campaign offers during a campaign call.

To use a call guide during a campaign call

1. Navigate to the Campaigns screen, and in the Overview view, select the appropriate campaign and contact or prospect.

   For more information, see "Making Outbound Campaign Calls" on page 151 or "Answering Inbound Campaign Calls" on page 152.

2. Scroll down until the Call Guide form is visible.

3. Use the text in the Call Guide form to help you present campaign offer information and ask qualifying questions.

4. Depending on the type of campaign, refer to the appropriate procedure for recording the caller's response to the campaign:

   - If the campaign Type is Opportunity, see "To create a campaign opportunity record" on page 156 to record a campaign response that represents a sales opportunity.

   - See "To record a brief campaign response" on page 157 for information about how to record a campaign response that does *not* represent a sales opportunity.

   - If the campaign Type is Response, see "To create a campaign opportunity record" on page 156 for information about how to record a campaign response that represents a sales opportunity.

   - See "To create a detailed campaign response record" on page 160 for information about how to record all other campaign responses.

Making Offers Using SmartScripts

This section describes how to use a SmartScript to communicate campaign offers during a campaign call. When a SmartScript is launched, the SmartScripts Explorer view appears. To use this feature, the agent asks the customer a series of questions that appear on the agent's screen. After recording each answer, the agent clicks the Next button and proceeds to the next question. The most current question is highlighted in the left pane of the Explorer window.

Markings in the Explorer window indicate the following:

- The red asterisk indicates a required field.
- The question mark means that the question is optional.

NOTE: If you are interrupted while using a SmartScript, you can save the script by clicking Finish Later. You can resume the script at a later time by navigating to the SmartScripts > My Saved Sessions view, selecting the session, and clicking Resume. If you change to another screen or view while running a SmartScript, the application remembers the last active question when you return to the script.

The following procedure initiates the use of a SmartScript from the Campaign Overview view. SmartScripts can also be started from the Campaign Contacts/ Prospects view or the SmartScripts screen.

For information about creating SmartScripts, see *Siebel SmartScript Administration Guide*.

NOTE: The Language field for the SmartScript determines which language the script runs on. If no language is selected then the system defaults to the application default language.

To use a SmartScript during a campaign call

1. Navigate to the Overview view of the Campaigns screen, and select the appropriate campaign and contact or prospect.

   For more information, see "To make an outbound campaign call" on page 151 or "To answer an inbound campaign call" on page 152.

2. In the Overview list, click Script to access the SmartScript associated with the campaign.

3. In the SmartScript Explorer view, read the bold text aloud, complete each field based on the contact's or prospect's response, and then click Next.

   The information you enter is stored in locations that depend on how your SmartScript is configured. Consult your Siebel administrator for information about whether you need to record additional response information, or if the use of the SmartScript is adequate.

4. When you are finished asking questions, click Finish to return to the Campaign Overview view.

5. Depending on the type of campaign you are participating in, refer to the appropriate procedure for recording the caller's response to the campaign:

   - If the campaign Type is Opportunity, see "To create a campaign opportunity record" on page 156 for information about how to record a campaign response that represents a sales opportunity.
   - See "To record a brief campaign response" on page 157 for information about how to record a campaign response that does *not* represent a sales opportunity.
   - If the campaign Type is Response, see "To create a campaign opportunity record" on page 156 for information about how to record a campaign response that represents a sales opportunity.
   - See "To create a detailed campaign response record" on page 160 for information about how to record all other campaign responses.

Recording Campaign Opportunities

The following procedure describes how to record a customer interaction that represents a sales opportunity. Only one opportunity record can be created for each campaign contact or prospect. This procedure applies to both Opportunity and Response campaign types.

NOTE: When you create an opportunity while a record of type Prospect is selected, the type is automatically changed to Contact, and other data changes may take place. When you create an opportunity for a prospect that is associated with a D&B D-U-N-S number, all other prospects associated with this D-U-N-S number are also promoted to contacts, and are associated with the new account, and are added to the opportunity. For information about the effects on data of promoting a prospect, see "Prospect Qualification and Promotion" on page 68. For information about promoting a prospect to a contact when there is no current sales opportunity, see "Promoting Campaign Prospects to Contacts" on page 163.

For more information about working with the Opportunity screen, see *Siebel Sales User Guide*.

To create a campaign opportunity record

1. Navigate to the Overview view of the Campaigns screen, and select the appropriate campaign, and the contact or prospect.

   For more information, see "To make an outbound campaign call" on page 151 or "To answer an inbound campaign call" on page 152.

2. Use the call guide or a SmartScript to verify that the contact or prospect represents a sales opportunity.

   For more information, see "To use a call guide during a campaign call" on page 153 or "To use a SmartScript during a campaign call" on page 155.

3. In the Overview list, click Create Opportunity.

   This command creates a campaign response record with Response Type set to Created Opportunity, and displays the Campaign Leads view for the Opportunity screen.

4 Complete the fields in the Opportunity form.

NOTE: One way to assign an opportunity to a sales representative is to add the representative to the Sales Team multi-value group in the Opportunity form, and select the Primary check box for that representative. Alternatively, your implementation may be set up to assign a sales representative to an opportunity automatically, using Assignment Manager. Consult your Siebel administrator for more information.

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5 Scroll down to the Profile form and complete the fields.

The profile stores information about the sales opportunity, rather than the contacts associated with the opportunity. You can complete the profile fields manually, or click Script to complete the fields by using SmartScript.

6 (Optional.) In the Activities list, add activities related to the opportunity.

7 Return to the Campaign Overview view and proceed to your next call.

Recording Non-Opportunity Campaign Responses

The following procedures describe how to record campaign responses that do not represent sales opportunities. The first procedure applies to campaigns of type Opportunity, and in cases where a campaign of type Response does *not* require a detailed response. The second procedure applies to campaigns where a detailed response is required.

To record a brief campaign response

1 Navigate to the Overview view of the Campaigns screen, and select the appropriate campaign and contact or prospect, as described in "To make an outbound campaign call" on page 151 or "To answer an inbound campaign call" on page 152.

2 Use the call guide or a SmartScript to verify that the current contact or prospect does *not* represent a sales opportunity, as described in "To use a call guide during a campaign call" on page 153 or "To use a SmartScript during a campaign call" on page 155.

3 In the Overview list, complete the Call Status and Outcome fields for the current contact or prospect, as well as any additional fields required for your campaign; some fields are described in Table 4, following this procedure.

4 When you are finished, select the Done check box, and proceed to your next call.

Table 4. Some Fields in the Campaign Overview List

Field	Comments
Call Status	Status of call attempts. Typical values include Busy, Call Back Later, Call Completed, In Progress, Left Message, No Answer, and Not Completed. By default, this field is for informational purposes only.
Contact Last Name	Last name of a contact to speak with during the campaign. If this field is populated, the Prospect Last Name field is blank. Campaign administrators associate contacts with campaigns.
Date/Time	Date and time when the Done check box is selected. The check box can be selected manually or it can be selected automatically by creating a response or an opportunity.
Done	When selected, indicates that the campaign call has been completed for the selected contact or prospect, and sets the record to be read-only. Automatically selected when you create a response or an opportunity. For a campaign that has a Primary Offer, manually selecting Done automatically creates a response record, and the Campaign Overview Outcome field is mapped to the equivalent Response Type field in the response record.
First Name	First name of a contact or prospect to speak with during the campaign. Automatically populated when campaign administrators associate a contact or prospect last name with the campaign.
Job Title	Occupation of the contact or prospect. Automatically populated from contact or prospect data.
Organization Owner	Organization within your company that is responsible for interacting with the contact or prospect. If your administrator has selected Enable Contact Editing in the Campaign Administration > Execution Options view, this field is automatically populated with the organization of the person who created the selected contact or prospect record.

Table 4. Some Fields in the Campaign Overview List

Field	Comments
Outcome	Result of the campaign call. Typical values include Created Opportunity, Created Response, Gave Referral, No Interest, Requested Call Back, Requested More Info, Respondent Interested, and Unable To Reach Contact. Automatically populated if you click Create Opportunity or Create Response, otherwise you must select a value. For a campaign that has a Primary Offer, when the Done check box is selected, the value of the Outcome field is mapped to the equivalent Response Type field of an automatically created response record.
Position Owner	Indicates the position within your company that is responsible for interacting with the contact or prospect. If your administrator has selected Enable Contact Editing in the Campaign Administration > Execution Options view, this field is automatically populated with the position of the person who created the selected contact or prospect record.
Prospect Last Name	Last name of a prospect to speak with during the campaign. If this field is populated, the Contact Last Name field is blank. Campaign administrators associate prospects with campaigns.
Type	Indicates whether the person to be spoken with is classified as a contact or a prospect. Automatically populated based on contact or prospect data. Changes from Prospect to Contact if you click Promote.

The following procedure describes how to record a detailed response that does not represent a sales opportunity. This would ordinarily be done for a Response campaign. For a campaign that tracks every interaction with a potential customer, there may be several responses for an individual contact or prospect, including brief responses such as requests to call another time.

To create a detailed campaign response record

1. Navigate to the Overview view of the Campaigns screen, and select the appropriate campaign and contact or prospect, as described in "To make an outbound campaign call" on page 151 or "To answer an inbound campaign call" on page 152.

2. Use the call guide or a SmartScript to verify that the current contact or prospect does *not* represent a sales opportunity, as described in "To use a call guide during a campaign call" on page 153 or "To use a SmartScript during a campaign call" on page 155.

3. In the Overview list, click Create Response to display the Responses list, a More Info form, and the Response Details form.

4. Complete the appropriate fields in the More Info form; some fields are described in Table 5 on page 161.

5 To enter additional information about the response, complete the appropriate fields in the Response Details form; some fields are described in Table 6 on page 161.

Table 5. Some Fields in the Campaign Responses More Info Form

Field	Comments
Lead Partner	Partner organization that provided the lead to the contact.
Method	How the contact was reached.
Offer Code	Unique number assigned to each offer. Automatically populated.
Outcome	Summarizes the results of the campaign for the current contact or prospect. Typical values include Created Order, Existing Customer, Existing Opportunity, Invalid Phone #, No Project Now, and so on.
Response Type	Summarizes the type of response received from the current contact or prospect. Typical values include Requested More Info, Not Interested, Response Created Opportunity, and so on. By default, the value of this field is set to Unclassified Response.
Score	An arbitrary value assigned by your organization. This field can be used to clarify whether a sales opportunity record should be created.
Source Code	Unique number assigned to each campaign. Automatically populated.
Status	Indicates whether campaign interactions with the current contact or prospect are complete or not. Available values are Open, Pending, and Closed.

Table 6. Some Fields in the Campaign Response Details Form

Field	Comments
Downloaded File	File the contact or prospect has downloaded from your organization's Web site. Depending on your implementation, this field may be automatically populated.
Priority	Indicates level of urgency for items to be mailed or shipped.
Ship Method	Indicates how additional information should be communicated to the current contact or prospect.

Table 6. Some Fields in the Campaign Response Details Form

Field	Comments
Subject	Brief description of the response.
Summary	More detailed description of the response.
Time of Day	For a call-back request, indicates the time of day to call back.

Promoting Campaign Prospects to Contacts

A prospect record can be promoted to a contact record as soon as the person represented by the record has expressed an interest in being in contact with your organization. For example, if you call a prospect whose name was obtained through renting a list of prospects, and if that person asks you to send further information about your products or services, your organization then has the right to treat that person as a contact, about whom information can be kept on file, instead of a prospect, who must be deleted from organizational records after a set time period.

If you create an opportunity as a result of a campaign call with a prospect, the prospect record is automatically promoted to a contact record, and that prospect is removed from the prospect list. For more information about the effects of promoting a prospect by creating a sales opportunity record, see "Promotion of Prospects to Contacts" on page 70.

If a prospect does not yet represent an opportunity, but has expressed interest in doing business with your organization, you can promote the Prospect record to a Contact record manually, as described in the following procedure.

To promote a campaign prospect to a contact

1. Navigate to the Overview view of the Campaigns screen, and select the appropriate campaign prospect record, as described in "To make an outbound campaign call" on page 151 or "To answer an inbound campaign call" on page 152.
2. Use the call guide or a SmartScript to verify that the current prospect qualifies to be promoted to a contact, but does not currently represent a sales opportunity.
3. In the Overview list, click Promote.

   Information disappears from the Prospect Last Name field and reappears in the Contact Last Name field.
4. If you have not already done so, complete the call using the method described in one of the following procedures:
   - "To record a brief campaign response" on page 157
   - "To create a detailed campaign response record" on page 160
5. Click the thread bar to return to the Campaign Overview view and proceed to your next call.

Promoting Campaign Responses to Opportunities

Occasionally, an agent may record a campaign interaction as a response, rather than a sales opportunity, but the interaction may lead to a sales opportunity at a later time. If this occurs, the campaign response record for the interaction can be promoted to an opportunity record, as described in the following procedure.

To promote a response to an opportunity

1. Navigate to the Responses screen.
2. From the Show drop-down list, select My Responses.
3. In the Responses list, select the response to promote.
4. Click the More Info view tab.
5. In the More Info form, click Create Opportunity.

NOTE: If the person being called is an existing contact, the application automatically associates the contact's account with the opportunity. If the person being called is a prospect, the application automatically promotes the customer to a contact, and then associates the contact with an account.

Working with Campaign Activities

Different organizations have different requirements regarding how much information to store about campaign activities. Some organizations track campaign activities such as planning meetings, obtaining plan approvals, sending campaign-related email, and so on.

An activity record can be associated with a campaign by entering the campaign name in the Source field for the Activity. Activity records that are created in the Campaign Activities view automatically have the Source field populated with the campaign name, even though the Source field is not visible in the Campaign Activities view.

If you are using Siebel Call Center with the Communications tool bar, your software may be configured to create an activity record, automatically, for each incoming or outgoing phone call. Consult your Siebel administrator to find out whether the Source field is automatically populated for activity records created in this way. If the field is not populated automatically, you can enter the campaign data manually to associate the activity with the campaign. When an activity record contains a campaign name in its Source field, that record becomes visible in the Campaign Activities view for that campaign, even if the record was created in a different screen and view.

The following procedure describes one way to associate an activity record with a campaign, including optional steps for associating the activity with a particular campaign contact or prospect.

NOTE: A single activity record can be associated with multiple contacts and prospects.

To associate an activity record with a campaign

1. Navigate to the Activities screen.
2. In the Activities list, select the activity you want to associate with a campaign.
3. In the More Info form, click the show more button.
4. In the Source field of the More Info form, click the select button to display the Lead Sources dialog box.

5. In the Lead Sources dialog box, select the campaign you want to associate with the activity, and then click OK.

   The selected campaign appears in the Source field.

6. If you want to associate this activity with a particular campaign contact, complete the following substeps:

   a. In the Contacts field of the More Info form, click the select button to display the Contacts dialog box.

   b. Click New to display the Add Contacts dialog box.

   c. Select the contact you want to associate with the activity, and then click OK to return to the Contacts dialog box.

   d. Click OK to return to the main window.

7. If you want to associate this activity with a particular campaign prospect, complete the following substeps:

   a. Click the Prospects view tab.

   b. In the Prospects list, click New to display the Prospects dialog box.

   c. Select the Prospect you want to associate with the activity, and then click OK.

Sending Correspondence to a Campaign Contact

One possible outcome of a campaign call is that a contact or prospect may request more information. The following procedure briefly describes how to send correspondence to a campaign contact. Siebel Call Center requires that a prospect be promoted to a contact before correspondence can be sent.

For more detailed information about creating and sending correspondence, see *Siebel Sales User Guide*. For information about setting up correspondence templates, see *Applications Administration Guide*.

To send correspondence to a campaign contact

1. If you have not already done so, navigate to the Campaign Overview view, and select the contact to receive correspondence.
2. In the application-level menu, choose File > New > Correspondence.

   A Correspondence list, a Recipients list, and an enclosures list appear. The Correspondence list contains a new record, already selected. The Recipients list contains a record for the contact you selected in Step 1. If you wish, you can click the Add button to add additional recipients.
3. Complete the fields in the Correspondence list.
4. In the Enclosures list, add literature items to be included with the correspondence.
5. When you have finished specifying the correspondence, choose one of the following methods to send it:
   - To print and mail the correspondence yourself, select the correspondence item in the Correspondence list, and then click the menu button and choose Print. After you mail the printed correspondence, select the correspondence item in the Correspondence list, and then click the menu button and choose Done to indicate that fulfillment is complete.
   - To submit the correspondence to the fulfillment center that is specified in the Correspondence record, click Submit.

Evaluating Campaigns

During or after a campaign, Siebel Call Center provides ways for you to evaluate campaign progress and effectiveness. You can inspect individual responses or view campaign statistics in the form of graphical charts. The following sections describe how to use these features.

Viewing Campaign Responses

Call center managers and campaign managers can view all responses to a particular campaign from the Campaigns screen, Responses view. The following procedure describes how to do this.

To view responses associated with a campaign

1. Navigate to the Campaigns screen.
2. From the Show drop-down list, select My Campaigns.
3. In the Campaigns list, select the campaign to which you want to view the responses.
4. Click the Responses view tab.
5. In the Response list, click the Description hyperlink of the response you would like to view additional details about.

Displaying Campaign Charts

Campaign charts allow campaign managers to assess performance and graphically display results in areas, such as incentive compensation, completed calls, and lead quality by campaign.

The following procedure describes how to display a campaign chart. All the charts that can be displayed using this procedure are charts that show information for multiple campaigns, rather than a single, selected campaign.

To display a campaign chart

1. Navigate to the Campaign screen.
2. In the Campaigns list, select any campaign.

3 Click the Charts view tab.

You may need to click the tab jump button to scroll the view tabs to the right, in order to make the Charts view tab visible.

4 In the Show drop-down list in the Charts form, select the type of chart you want to display.

Available chart types are listed in Table 7, following this procedure.

Depending on the type of chart you have chosen, one or more additional drop-down lists may appear below the Show drop-down list.

5 If you wish, choose new values in drop-down lists to adjust the chart style, the specific data to represent, or other chart characteristics, and then click Go.

Table 7. Campaign Charts

Chart	Description
Campaign Achievements	Displays the results of the Sales Quota Plan set up for each campaign. It represents the percentage achievement of quota for each campaign.
Campaign Call Status Analysis	Displays the number of calls that have been completed versus the number of calls that have not been completed for each campaign. Call center managers can use this chart to determine which campaigns are taking longer and how to shift resources.
Campaign Call Status Analysis by Employee	Displays the number of calls that have been completed versus the number of calls that have not been completed for each campaign for a specific employee. This chart is intended for use by managers.
Lead Quality Analysis by Campaign	Displays the opportunities that have been created for opportunity campaigns. It can display the opportunities based on each campaign or the opportunities based on their lead quality.
My Campaign Call Status Analysis	Displays complete versus incomplete calls for all contacts and prospects assigned to a particular agent for a specific campaign. This chart is intended for the agent’s use.

Table 7. Campaign Charts

Chart	Description
Opportunity Revenue Analysis	Displays the total number of opportunities and the expected opportunity revenue for each campaign. Bars represent opportunity revenue and red dots represent the number of opportunities.
Opportunity Revenue Analysis by Employee	Displays the total number of opportunities and the expected opportunity revenue for each employee. Bars represent opportunity revenue and red dots represent the number of opportunities.
Order Revenue Analysis	Shows the total number of orders created for each campaign and the total revenue generated for those orders.
Trend Analysis	Displays the total number of responses for each campaign over a period of time. The period can be specified by day, week, month, quarter, and year.
Trend Analysis by Employee	Displays the total number of responses generated by each employee across campaigns over a period of time. The period can be specified by day, week, month, quarter, and year.

Displaying Campaign Response Charts

Response charts allow campaign managers to assess performance and graphically display results in areas such as responses received from campaign calls, number of opportunities created, and number of responses per offer.

The following procedure describes the how to display a response chart.

To display a response chart

1. Navigate to the Responses screen.
2. Click the Charts view tab.

3 In the Charts form, in the Show drop-down list, select the type of chart you want to display.

Available chart types are listed in Table 8, following this procedure.

Depending on the type of chart you have chosen, one or more additional drop-down lists may appear below the Show drop-down list.

4 If you wish, choose new values in drop-down lists to adjust the chart style or other chart characteristics, and then click Go.

Table 8. Response Charts

Chart	Description
Response Campaign Analysis	Displays the total number of responses for each campaign. The campaign name is associated with the response. It is based on the campaign name in the All Responses list or the My Responses list.
Response Opportunity Analysis	Displays the total number of opportunities created for each campaign. This chart is based on the information in the Opportunity Source field.
Response Offer Analysis	Displays the total number of responses per offer. This chart is based on the Offer name in the All Responses list or the My Responses list.
Response Offer Type Analysis	Displays the total number of responses per offer type. This chart is based how many responses were received for each offer type across all campaigns.
Response Offer Type Analysis by Campaign	Displays the total number of responses per offer type for each campaign. This chart is based on how many responses were received for each offer type within each campaign.

Table 8. Response Charts

Chart	Description
Response Revenue Analysis	Displays the total revenue for each campaign and the total number of opportunities for each campaign. The bar chart has the revenue by campaign and the line graph shows the number of opportunities for each campaign. The revenue number comes from the sum of the Revenue field in the opportunity with the Source field equal to the campaign name.
Response Average Opportunity Revenue Analysis	Displays the average revenue for each campaign. For each opportunity created for the campaign, the revenue is added and the average is taken across all opportunities created for the campaign.

Index

I

L

M

O

P

Q

R

S