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eBusiness

SIEBEL CONSUMER SECTOR
GUIDE

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Introduction

This guide describes how administrators and end users are expected to use the features and procedures that are specific to the standard Siebel Consumer Sector applications. It should be used in combination with other books in the Application Administration of the *Siebel Bookshelf* CD-ROM. However, the information in this book supersedes information about standard Siebel products provided in other documentation. In addition, some configuration information that is specific for Siebel Consumer Sector applications is included in this guide.

This book will be useful to people whose titles or job descriptions match one of the following:

Call Center Administrators	Persons responsible for setting up and maintaining a call center. Duties may include designing and managing Computer Telephony Integration (CTI), SmartScripts, and message broadcasts.
Database Administrators	Persons who administer the database system, including data loading, system monitoring, backup and recovery, space allocation and sizing, and user account management.
Marketing Administrators	Persons responsible for setting up and maintaining a marketing department. Duties may include: defining and maintaining account hierarchies and account profiles, creating and managing promotional campaigns or product marketing information, defining corporate objectives and activities, creating (or importing) sales volume planning data, and defining and maintaining 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.
Siebel System Administrators	Persons responsible for the whole system, including installing, maintaining, and upgrading Siebel applications.

How This Guide Is Organized

The first chapter of this book contains overview information about Siebel Consumer Sector applications and how they can be applied to your business needs. The second chapter contains information that applies to the initial setup of the Siebel Consumer Sector applications.

The remaining chapters in this guide are workflow-oriented. Each chapter guides you through an example workflow that illustrates the use of the important Siebel Siebel Consumer Sector screens and views. In general, each chapter contains information about a separate functional area of the product that correlates with a separate screen. However, some chapters cover more than one screen, and you will find information about some screens in more than one chapter. This is often because the same information can be accessed from different screens.

Siebel Consumer Sector applications share functionality with other Siebel eBusiness applications. This guide focuses on features that are unique to the Siebel Consumer Sector products. You will be referred to other guides on the *Siebel Bookshelf* for information about procedures for some screens, views or fields.

Configuration information related to the features described in each chapter is included at the end of the chapter, as appropriate.

The appendix lists the Siebel Consumer Sector-specific reports available.

It is assumed that before reading this book you have already read *Fundamentals*, which is available on the *Siebel Bookshelf*.

Revision History

Siebel Consumer Sector Guide, Version 7.5
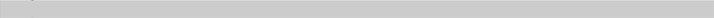
Consumer Sector Product Overview 1

The Consumer Sector application products are Siebel eConsumer Goods, Siebel eApparel and Footwear, and Siebel eRetail.

About Siebel eConsumer Goods

Siebel eConsumer Goods is a multichannel suite of applications designed for the consumer goods industry. These products help consumer goods manufacturers manage relationships across the entire demand chain. Marketing, sales and customer service applications are fully integrated, and are designed to manage the various complex interactions and relationships between brand owners, their partners (including brokers and distributors), their customers, and the end-consumer.

Siebel eConsumer Goods provides customer, partner and employee relationship management solutions for companies in the following industry segments:

■ Food, beverage, and tobacco

■ Over-the-counter drugs (OTC) and health-and-beauty aids (HBA)

■ Household goods

■ Consumer media

■ Apparel and footwear

■ Appliances and electronics

About Siebel eApparel and Footwear

Siebel eApparel and Footwear suite extends and enhances the functionality offered in the Siebel eConsumer Goods application suite, with industry-specific options designed to manage the planning and ordering complexities inherent with multi-dimensional products.

The suite allows companies to manage the sales and marketing of products with complex attributes such as style, color, size, and season. Siebel eApparel and Footwear coordinates all customer touchpoints by providing:

- **Collaborative assortment planning.** Although this feature is designed to meet the exacting needs of the apparel and footwear industry, it can also be applicable to consumer goods manufacturers. This feature allows vendors and retailers to collaboratively plan for future seasons, streamlining the preseason product planning process. Account managers can create seasonal assortment plans designating product styles, colors, sizes, and quantities, and the retailer delivery information. Retail buyers can view and modify the plans over the Internet. Once the plans are approved by all parties, the demand information can be aggregated and interfaced with back-end supply chain planning systems.

- **Complex order capture.** This feature allows brand owners to capture orders for multidimensional products from any customer touchpoint, whether it is a customer service representative's laptop computer, a call center agents' screen, or the customer's Internet connection. Orders can be configured with line item details such as styles, colors, sizes, and size distributions, and multiple ship-to addresses and delivery dates.

About Siebel eRetail

Siebel eRetail is a multichannel suite of applications designed to help retailers manage customer relationships across all stages of the customer life cycle—from initial attraction through marketing, to engagement and conversion in the sales process, to delivery of after-sales service and customer service.

Siebel eRetail provides customer relationship management solutions for companies in the following industry segments:

- Department stores

- Specialty stores

- General merchandise and discount stores

- Catalog

- Food and service

Key Features of Siebel Consumer Sector Products

Table 1 describes how Siebel Consumer Sector applications can provide solutions for key business issues. The solutions described include optional features and modules, which may differ from your company's implementation of Consumer Sector products.

Table 1.   Siebel Consumer Sector Solutions for Key Business Issues

Business Issue	Siebel Consumer Sector Solutions
Account management	■ Management of accounts through multilevel account hierarchies based on complex account relationships ■ Management of account and customer information through profiles
Agreement management	■ Automated production of agreements from accepted quotes ■ Coordination of pricing information ■ Assigning of standard terms, conditions, and features ■ Tracking to make sure that agreements and service entitlements are fulfilled
Audit trail	■ Creation of a history of all the changes that have been made to various kinds of information ■ Records show who has accessed an item, what operation has been performed, when it was performed, and how the value was changed ■ Useful for maintaining security, examining the history of a particular record, and documenting modifications for future analysis and record-keeping
Billing management	■ Integration with back-office billing systems ■ Query and display of billing information ■ Management of payment information, payment plans, bill adjustments, and bill profiles
Brand management	■ Management of brands through account distribution lists and personalization attributes ■ Dynamic matching of accounts and products to make sure the right accounts get the right products

Key Features of Siebel Consumer Sector Products

Table 1.   Siebel Consumer Sector Solutions for Key Business Issues

Business Issue	Siebel Consumer Sector Solutions
Call center optimization	■ Single desktop to manage multiple types of customer interactions ■ Computer telephony integration (CTI) to connect callers with the most qualified agent ■ Integrated Web and Interactive Voice Response (IVR) self-service functionality
Credit management	■ Integration with a back-office credit system ■ Management of credit alerts ■ Notification of customers who are delinquent in payments
Customer acquisition	■ Analytical tools for segmenting prospects and developing targeted campaigns ■ Campaign management tools for developing and executing multichannel campaigns ■ Prebuilt performance analysis tools ■ Call scripting, delivering messages that use proactive selling and retention techniques during customer contacts ■ Intelligent territory assignment, lead scoring, and routing
Customer and partner applications	■ eChannel, which allows your company to turn channel partners into an extended, virtual sales and service organization through the Internet ■ eService, which allows your customers to create and track their own trouble tickets and service requests, and to search for answers to frequently asked questions (FAQs), through the Internet ■ eSales, which allows your customers to browse though your company's products and services, configure them, and purchase them, through the Internet
Customer retention	■ Comprehensive customer profile that is shared throughout the enterprise ■ Sales tools that increase sales effectiveness and maximize time spent building relationships ■ Tools for marketing analysis, campaign development, and execution

Table 1.   Siebel Consumer Sector Solutions for Key Business Issues

Business Issue	Siebel Consumer Sector Solutions
Analytics	■ Encapsulates best practices across Siebel eBusiness applications ■ Enables self-service access to intelligence across business applications ■ Delivers proactive intelligence around trade funds, promotion evaluation, sales performance, and retail execution ■ Uses existing enterprise data sources
Equipment and infrastructure	■ Management of physical assets available at a customer site ■ Tracking of equipment sales to accounts ■ Management of meters and assets
Fraud management	■ Integration with a back-office fraud management system ■ Management of fraud alerts ■ Definition of relevant thresholds for customer fraud profiles ■ Classification of customer accounts to indicate the likelihood of fraud ■ Management of customer accounts that are either late in settlement or delinquent
Order configuration and management	■ Siebel Configurator automates the generation of quotes and sales orders. ■ Tracking of relationships between sales, sales orders, and work orders ■ Definition of process rules and automatic escalation of open sales orders ■ Use of product parameters in generating sales orders ■ Provisioning of sales orders through work orders ■ Incorporating complex attributes such as style, color, size, and multiple ship-to destinations
Pricing management	■ A set of tools for defining pricing adjustments and the conditions under which they should be applied ■ An engine that evaluates condition statements and determines which pricing adjustments to apply ■ A testing area that allows assessment of the pricing adjustments ■ Integration with end-user interfaces such as Quotes, Orders, Siebel eSales, Siebel eChannel, and Siebel eConfigurator

Key Features of Siebel Consumer Sector Products

Table 1.   Siebel Consumer Sector Solutions for Key Business Issues

Business Issue	Siebel Consumer Sector Solutions
Information analysis and marketing	■ Analysis of customer information and measurement of campaign results with marketing analytics ■ Creation and execution of targeted marketing campaigns ■ Internet marketing with eMarketing: integrated email campaigns, customized Web offers, personalized Web pages, Internet newsletters, and Internet surveys
Third-party and legacy integration	■ Prebuilt COM and CORBA interfaces to leading Operating System Software (OSS) and Enterprise Resource Planning (ERP) applications ■ Integration mapping tools for cross-application process integration ■ Siebel Enterprise Integration Manager (EIM), which allows bidirectional data exchange and synchronization ■ Performing credit verification and address validation ■ Maintenance of billing accounts through an external billing system
Service request management	■ Single platform for logging, assigning, managing, and resolving customers' problems ■ Online solutions search capability ■ Proactive customer notifications through email, pager, fax, and Internet ■ Automatic escalation of overdue service requests
Up-selling and cross-selling	■ Scripting engine that identifies up-sell and cross-sell opportunities with every customer contact ■ Provide an atmosphere of suggestive selling with the ability to build complex assortment plans

Product Modules and Options

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

For information on the optional modules that can be used with Siebel Consumer Sector applications, contact your Siebel sales representative or local Siebel Sales Office.

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

The exact configuration of Siebel Consumer Sector screens, views, and fields depends on your company's configuration of the application.

For introductory information on using the Siebel Consumer Sector standard interface, see *Fundamentals*, and *Siebel Online Help*.

Business Functions of Screen Tabs

The Siebel Consumer Sector interface includes task-specific screens. Some screens are used exclusively by administrators.

Table 2 lists the most frequently used Siebel Consumer Sector screens and the business functions of the views in those screens.

Table 2.   Siebel Consumer Sector Screens

Screen	Functions of the Views in This Screen	Location of Information About This Screen
Accounts	Create, view, and update accounts. Set up and maintain account hierarchies. Define and maintain account profile information.	Chapter 3, "Accounts" in this guide. Chapter 5, "Product Distribution" in this guide.
Activities	Manage activities with accounts, contacts, opportunities, and service requests, and create contact and account calls (with or without Smart Calls).	*Siebel Call Center User Guide.*
Agreements	Manage information about agreements, administrative contracts, and entitlements.	*Siebel Field Service Guide.*
Assets	Manage information about products sold to accounts.	*Siebel Field Service Guide.*
Assortments	Create assortment plans, which allow your company to forecast the product demand for the upcoming season. Plans can be shared with retailers over the Internet for collaborative planning. Consolidate assortment plans into a single plan.	Chapter 14, "Assortment Plans" in this guide.
Audit Trail	Creates a history of the changes that have been made in the application.	*Applications Administration Guide.*
Briefings	Gather and format information from a number of different sources, both inside and outside your company, including the World Wide Web.	*Siebel eBriefings Guide.*
Calendar	Create and display activities (including to-do activities) and share calendar information with co-workers.	*Fundamentals.*

Table 2.   Siebel Consumer Sector Screens

Screen	Functions of the Views in This Screen	Location of Information About This Screen
Campaigns	Manage outbound communications with prospects targeted for a particular marketing effort.	*Applications Administration Guide*.
Contacts	Record and track business and personal contact information associated with an account, an opportunity, a trouble ticket, or service request.	*Applications Administration Guide*.
Corporate Promotions	Manage company-wide promotions of a product or category of products in which accounts can participate.	Chapter 7, "Trade Promotions" in this guide.
Cycle Counting	Manage inventory by grouping assets into classes and counting each class's assets over a period and at designated intervals.	*Siebel Field Service Guide*.
Deductions	Manage the deductions process.	Chapter 9, "Deductions" in this guide.
Expense Reports	Manage expense-report information for your own expenses, or your team's expenses.	*Applications Administration Guide*.
Forecasts	Create business forecasts based on opportunities or products.	*Applications Administration Guide*.
Groups	Create buying groups and planning groups, which allow account managers to plan for aggregate demand from multiple accounts.	For information on buying groups, see Chapter 5, "Product Distribution" in this guide. For information on planning groups, see Chapter 14, "Assortment Plans" in this guide.
Literature	Display company- and industry-related literature cataloged by the Siebel administrator.	*Applications Administration Guide*.
Objectives	Help drive corporate goals by defining objectives for contacts and accounts and monitor progress towards meeting sales goals.	Chapter 10, "Objectives" in this guide.
Opportunities	Manage sales opportunities for business and residential customers.	*Siebel Sales User Guide*.

Table 2.   Siebel Consumer Sector Screens

Screen	Functions of the Views in This Screen	Location of Information About This Screen
Orders	Create sales orders and track their status. Generate order summaries.	For complex quotes and orders, incorporating line item details such as style, color, size, and multiple ship-to destinations distributions, see Chapter 15, "Complex Quotes and Orders" in this guide. For additional order management, see *Siebel Order Management Guide*.
Part Browser	Check on-hand inventory.	*Siebel Field Service Guide*.
Plans	Organize trade promotions by account.	Chapter 7, "Trade Promotions."
Products	Enter and maintain products, product images, product lines, product features and price list definitions.	Chapter 4, "Products."
Promoted Products	Designate products as promoted products for the purpose of conducing simulation on a product outside of a promotions	Chapter 7, "Trade Promotions."
Promotions	Organize and manage trade promotions by account. Depict aggregate results of plan promotions such as spending and volume by plan and by product.	Chapter 7, "Trade Promotions" in this guide.
Quality	Manage information about adverse events or reactions related to products.	*Applications Administration Guide*.
Quotes	Create quotes with style, color, size, multiple ship-to destinations, and delivery dates. Automatically allocate product size quantities based on account-specific or corporate-level predefined size distributions.	Chapter 15, "Complex Quotes and Orders" in this guide. For traditional quote compilation, see *Siebel Sales User Guide*. For quote and orders management using customizable (configurable) products, see *Siebel Order Management Guide*.
Receiving	Record and review information relating to a physical receipt of material.	*Siebel Field Service Guide*.

Table 2.   Siebel Consumer Sector Screens

Screen	Functions of the Views in This Screen	Location of Information About This Screen
Repairs	Track defective products returned to a service center for repair.	*Siebel Field Service Guide.*
Routes	Manage retail outlets by creating sales routes. Add individual accounts to a specific Route that can be incorporated into a mobile field professional's routine visit schedule. These routes can be used to schedule store visits on regular, predefined intervals.	Chapter 11, "Routes" in this guide.
Service Inventory	Manage the service parts inventory process.	*Siebel Field Service Guide.*
Service Requests	Create, display, and update customer requests for information about or assistance with products or services.	*Siebel Field Service Guide.*
Shipping	Record and review information relating to a physical shipment of material.	*Siebel Field Service Guide.*
SmartScript	Define the application workflow for an interactive situation in a script. These interactive situations could include inbound communications (such as customer service) and outbound contacts (such as telemarketing).	*Siebel SmartScript Administration Guide.*
Solutions	Search, organize, and add to a knowledge base of answers to service requests and trouble tickets.	*Siebel Field Service Guide.*
Targeting	Identify accounts by querying on profile information (such as sales volumes or location) to generate a list of accounts. The list can be used to schedule visits and plan routes.	Chapter 13, "Account Targeting" in this guide.
Training	Host, or participate in, electronic training sessions over a corporate intranet or the Internet.	*Siebel eTraining Guide.*

Business Functions of Screen Tabs

Getting Started   2

This chapter lists the applications administration tasks that are specific to Siebel Consumer Sector applications. Use this chapter in combination with *Applications Administration Guide*.

Applications Administration Guide covers the setup tasks that are common to all Siebel eBusiness Applications, such as using license keys, defining employees, and defining your company's structure. It also provides the information you will need to implement, configure, and monitor the Siebel sales, service, and marketing products and to perform data administration and document administration tasks. Some tasks discussed in this chapter might replace the corresponding ones in the administration guide, whereas others might be additional tasks. Make sure you review Table 3 on page 32 before following the procedures in *Applications Administration Guide*.

This guide assumes that you have already installed, or if you are an existing customer, installed and completed the upgrade of, a Siebel Consumer Sector application. If you have not, go to the Installation/Upgrade section of the *Siebel Bookshelf* and click the links to the guides that are relevant to your company's implementation.

The Siebel Database Server installation script creates a Siebel administrator account that can be used to perform the tasks described in this guide. For information about this process, see the server installation guide for the operating system you are using and *Siebel Server Administration Guide*.

CAUTION: Do not perform system administration functions on your local database. Although there is nothing to prevent you from doing this, it can have serious results, such as data conflicts, an overly large local database, or a large number of additional transactions to route.

Siebel Consumer Sector Administrative Setup Tasks

Table 3 lists and describes the administrative setup tasks that are specific to Siebel Siebel Consumer Sector applications and tasks that might differ from those of the other Siebel eBusiness Applications. The table also directs you to documentation that provides information about each task.

When setting up your application, use Table 3 in combination with *Applications Administration Guide*.

Table 3.   Siebel Consumer Sector Administrative Tasks

Administrative Task	Description	For More Information
Data loading and integration	Load data from other databases in your company into the Siebel database. You may also want to integrate with other database applications or perform periodic batch imports and exports of data between these applications.	*Siebel Enterprise Integration Manager Administration Guide* *Overview: Siebel eBusiness Application Integration Volume I* *Integration Platform Technologies: Siebel eBusiness Application Integration Volume II* *Transports and Interfaces: Siebel eBusiness Application Integration Volume III* *Business Processes and Rules: Siebel eBusiness Application Integration Volume IV* *Interface Tables Reference*
Define sales territories	Define sales territories and set up the territory assignment process, if applicable.	*Siebel Web Client Administration Guide*
Create periods	Customize the LOVs for periods, season periods (if applicable), and period types (if necessary).	"Creating Periods" on page 35
Set up Siebel Workflow Policies	For customers using the Trade Promotions, Trade Funds or Sales Volume Planning modules, set up Workflow Policies.	"Setting Up Siebel Workflow Policies for Consumer Sector" on page 38

Table 3.   Siebel Consumer Sector Administrative Tasks

Administrative Task	Description	For More Information
Product administration	If data is not imported with established catalog and category hierarchies, you may need to create and manage product definitions and attributes.	Chapter 4, "Products"
	Create catalog and category hierarchies for use with Sales Volume Planning module.	Chapter 6, "Sales Volume Planning"
Product distribution	Create account distribution hierarchy and assign distribution codes to account/category and product/category combinations.	Chapter , "Product Distribution"
Sales Volume Planning administration	Create sales volume planning account-product hierarchy.	Chapter 6, "Sales Volume Planning"
Funds administration	Create parent and child funds and aggregate products under child funds.	Chapter 8, "Trade Funds"
Deductions administration	Modify, split, and add literature to deductions, and add invoices and credit memos.	Chapter 9, "Deductions"
Objectives administration	Create objectives, add accounts and recommended activities to objectives.	Chapter 10, "Objectives"
Account Targeting administration	Change private predefined queries into public predefined queries.	Chapter 13, "Account Targeting"
Assortment delivery flows	Set up delivery flow models and delivery flow types.	Chapter 14, "Assortment Plans"

Selected Setup Procedures

The following section provides detailed setup procedures that are required for implementation for more than one module or option within the Consumer Sector products. Setup procedures that are specific to only one module are documented in the chapter describing the use of that module or option.

This section provides instructions for the following procedures:

■ To create a period on page 36

■ To create a season period on page 37

■ To add values to the Period Type list of values on page 38

■ To enable Siebel Workflow Policies on page 39

■ To generate triggers in Siebel Workflow Policies on page 40

■ To start Workflow Monitor Agent on page 41

Creating Periods

Periods appear in picklists for the end users to populate the Period field in various screens. Table 4 describes how periods are used with the features of Consumer Sector.

Table 4.   Consumer Sector Features That Use Periods

Feature	Comments
Assortment Plans	Assortment plan amounts can be spread across the delivery periods in the season for which the assortment plan is created. You must first create a series of delivery periods that correspond to the delivery frequencies supported for various customers.
	For example, if your company delivers products to certain customers on a weekly basis and delivers to other customer on a monthly basis, you need to create delivery periods to represent each week and periods to represent each month in the season for which assortment plans will be created.
	The assortment planning feature also requires Season periods.
	Action of periods: Invoke dynamic columns in Assortment Plans, provided the periods fall within the specified season.
Trade Promotions	Periods designate when the promotion will be active (or effective).
Sales Volume Planning	You must create periods to represent the units of time you will be working with in the sales volume planning process. For example, if your company is preparing to perform sales volume planning for the year 2001, and will divide its sales volume estimates into weekly amounts, you should create periods called Week 01 - 2001, Week 02 - 2001, and so forth through Week 52 - 2001.
	Carefully consider the periods you will be creating for Sales Volume Planning.
	Sales Volume Period Types *cannot* be aggregated into each other to aggregate periodic data. For example, period types Week 01, 2001 through Week 04, 2001 cannot be aggregated to create data for Month 01, 2001. Similarly, period types Month 01, 2001 through Month 12, 2001 cannot be aggregated to create data for Year 2001.

The following section describes the procedures for setting up periods for use with Siebel Consumer Sector applications.

CAUTION: Periods are sorted chronologically by their start date. Therefore, you must not create periods that have the same period type and start date.

To create a period

1 From the application-level menu, click View > Site Map > Application Administration > Periods.

2 In the Period Definition list, click New.

3 Enter a name in the Period Name field.

4 Select the value in the Period Type field that corresponds to the unit for time the delivery period spans (such as Week or Month).

NOTE: If an appropriate value is not available in the Period Type list of values, you can add it. See "Adding Values to the Period Type List of Values" on page 37 for more information.

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5 Select the first and last days of the delivery period in the Start date and End date fields.

6 Complete the fields.

Creating Season Periods

You can create separate, unique season periods to indicate seasonal product availability.

The Assortment Planning feature is preconfigured for the use of seasons, because of the importance of seasonality to the apparel and footwear industry. You must create season periods to make full use of this feature.

To create a season period

1 From the application-level menu, click View > Site Map > Application Administration > Periods.

2 In the Period Definition list, click New.

3 Enter the name of the season in the Period Name field.

4 Select Season in the Period Type field.

> **NOTE:** You must select Season as the Period Type. If Season is not available in the Period Type list of values, you must add it. Refer to "Adding Values to the Period Type List of Values."

5 Complete the fields.

Adding Values to the Period Type List of Values

The seed data delivered with Siebel Consumer Sector applications includes the Period Type values: Day, Week, Bi-Weekly, Month, Quarter, Half-year, Year, and Season. If you want to create periods for intervals that are not represented by one of these values, you should add a new value. For example, if you want to create half-month periods, you should create a Period Type value named Bi-Monthly.

See Table 4 on page 35 for additional information about the period Types that are applicable to various features.

The Season Period Type value is required for the creation of seasonal period records. If the Season value is inadvertently deleted from the Period Type list of values in your database, you must restore it.

To add values to the Period Type list of values

1 From the application-level menu, click View > Site Map > Application Administration > List of Values

2 Query for PERIOD_TYPE in the Type field.

NOTE: For details on how to query from a multivalue pop-up, see *Fundamentals*.

3 Select any of the Period Type records displayed by the query.

4 From the menu button drop-down list, choose Copy Record.

The record is duplicated in the List of Values list.

5 Select the new record and enter a name in the Display Value field.

6 In the Order field, enter a number to specify the order in which the value appears in the Period Type list of values.

NOTE: Each Period Type record must have a unique Order value.

7 Complete the fields.

For detailed information on administration tasks for lists of values, see *Applications Administration Guide*.

Setting Up Siebel Workflow Policies for Consumer Sector

Table 5 lists the Consumer Sector modules that use Siebel Workflow Policies.

Table 5. Consumer Sector Modules That Use Siebel Workflow Policies

Module	Action
Sales Volume Planning	Automates Sales Volume Planning Action field.
Trade Promotions and Funds (considered together)	Aggregates all "Paid" payments and reflects changes in the status of payments by the back office.

Process Overview

You will need to perform these steps, in the order given, to set up Workflow Policies for the Sales Volume Planning module. The remaining modules do not require performing all of the steps given.

1 Enable Workflow Policies.

2 Generate triggers.

3 Start Workflow Policies Agent for each applicable module.

4 Test Workflow Policies Agent.

For more detailed information on Siebel Workflow, see *Siebel Business Process Designer Administration Guide.*

Enabling Siebel Workflow Policies

You must enable Siebel Workflow Policies before using any one of the modules that require it. However, if you are using more than one of these modules, you need only enable Workflow Policies once.

To enable Siebel Workflow Policies

1 From the application-level menu, choose View > Site Map > Server Administration > Enterprise Configuration > Component Groups.

2 In the Component Groups list, query for and select the record containing Workflow Management.

3 From the Components Groups menu drop-down list, select Enable Component Group.

4 Click the Batch Component Administration view tab.

5 In the Batch Components list, click Synchronize.

The components will populate the Batch Components list.

NOTE: After enabling Workflow Policies you may need to stop and restart the server.

Generating Triggers in Siebel Workflow Policies

The Generate Trigger (GenTrig) component on the Siebel Server allows you to create database triggers. Policy Manager uses these database triggers to identify which records may match policy conditions. You must regenerate triggers whenever new policies are created or deleted.

To generate triggers in Siebel Workflow Policies

1 From the application-level menu, choose View > Site Map > Server Administration > Enterprise Operations > Component Requests.

2 In the Component Requests form, click New.

3 In the Component/Job field, select Generate Triggers.

   This creates a new line entry but does not start the task.

4 In the Component Request Parameters list, click New and fill in the fields in the following order:

   a Name: Click the name select button to query for and select the EXEC record.

   b Value: Type True.

5 In the Component Request Parameter list, click New.

6 In the Component Request Parameter list, click the name select button to query for and select the Privilege User password record, and click OK.

7 In the Component Request Parameter list, click New.

8 In the Component Request Parameter list, click the name select button to query for and select the Privilege User record, and click OK.

9 In the Component Requests form, click the menu button and select Submit Request.

10 In the Component form, click the menu button and select Run Query.

Starting Workflow Monitor Agent

You need to start Workflow Monitor Agent to execute your policies. Workflow Monitor Agent checks to see when the conditions of policies are met.

NOTE: You must use a command prompt to start Workflow Monitor Agent. You cannot start it from the application.

To start Workflow Monitor Agent

1 Log in as a Siebel Administrator.

2 Open a DOS command prompt, navigate to `\eapps\siebsrvr\bin` and execute the following command:

```
Srvrmgr / e <Enterprise name> /s <siebelserver name> /g <gateway
server name> /u sadmin/p<password>
```

3 Type the following:

```
start task for comp workmon with
tableownpass='<password>',Actionagent='false',Groupname='CG SVP'
```

Selected Setup Procedures

Accounts 3

Accounts are primarily used to represent the wholesale and retail companies to which you sell products, and the organizations and physical locations within those companies. You can also use accounts to represent your own company and competitor companies.

This chapter describes the procedures needed to set up and maintain accounts and account hierarchies.

About Accounts

Accounts are critical to your business efforts, so maintaining complete, accurate data on your accounts is a primary task. Bulk loading of data on accounts can be performed by an administrator, but administrators and end users can also add and modify accounts manually as needed. For accounts with multiple departments and divisions, end users can enter independent information on those sub-accounts.

For more information about bulk loading account information, such as account demographic information, hierarchy, and general account attributes, see *Siebel Enterprise Integration Manager Administration Guide*.

About Account Hierarchies

You can manage and administer different hierarchies for different customers. For example, for a large chain of drugstores, you can establish a four-level hierarchy with the corporate headquarters office at the top level, its regional offices in the second level, its distribution centers at the third level, and its retail stores at the fourth level. For a distributor you might establish a two-level hierarchy with the distributor at the top level and the retail outlets it serves at the second level. If a company uses a third-party distributor for its products, you can associate this indirect account as well.

For detailed information on structuring organizations, see *Applications Administration Guide*.

About Account Classification

Accounts can be classified in many ways. Several of these standard classifications can drive specific application functionality.

Account type. Classifying an account by type, such as Retailer or Distributor, can drive a dynamic profile attribute form. This determines the profile information that will be stored and displayed for the account.

Distribution code. Distribution codes can be applied to accounts and products to automatically create authorized distribution lists.

Market segment. Classifying an account's market segment determines the types of products that will appear in that account's product catalog when creating assortment plans. You classify your customer accounts' market segment by assigning the personalization attributes Account Channel and Product Differentiator to accounts, and products or product categories or both.

For details on methods available for controlling authorized product distribution based on distribution codes or account market segment, see Chapter 5, "Product Distribution."

Business Scenario

This example scenario for accounts is performed by marketing administrators, key account managers, and retail sales representatives. Your company may follow a different workflow according to its business requirements.

The marketing administrator for a food manufacturing company is responsible for maintaining the account-related data within the Siebel application. Generally, all of the account data is bulk loaded into the Siebel application from the food manufacturer's legacy database. However, the company has just acquired a new account, ABC Mart, and the decision has been made to manually input the information about this account directly into the Siebel application.

The administrator begins by creating account records for all of ABC Mart's headquarters offices and retail outlets. He then organizes these accounts into a hierarchy. He positions the corporate headquarters for ABC Mart at the top of the hierarchy, with regional headquarters in the middle, and retail outlets at the bottom. For each account, he then adds account profile and account contacts information, and creates addresses and account assessment templates. He arranges with the database administrator to import consumer demographic information into the Siebel database, including size of household, income level, and location. Also, he can manually assign account team members or use Siebel Assignment Manager to automatically assign them, based on factors such as State, Area Code, and Type of account. He lets the new key account manager know that the account information is ready.

The key account manager for ABC Mart instructs the retail sales representatives who report to her to enter activities and opportunities for each of the ABC Mart accounts for which they are responsible.

As the sales representatives interact with their contacts at the retail outlets, they enter unique information about each account, such as new contacts, addresses, assessments, best call times, store sizes, visit frequencies, or any additional demographic information. As sales territories change, representatives can remove themselves from account teams. As new representatives are hired, detailed information about accounts is available to them, based on their roles and responsibilities.

Example Workflow for Accounts

This example workflow for accounts is performed by marketing administrators and key account managers. Your company may follow a different workflow according to its business requirements.

Administrator Procedures

You should perform the procedures in the order shown here.

1 **Add an account.** For more information, see "Adding or Modifying Accounts" on page 49.

2 **Set up an account hierarchy.** For more information, see "Setting Up Account Hierarchies" on page 54.

3 **Profile an account.** For more information, see "Profiling an Account" on page 55.

4 **Create account contacts.** For more information, see *Applications Administration Guide*.

> **NOTE:** In the standard Siebel Consumer Sector applications, contacts have a M:M relationship with addresses. That is, multiple accounts and multiple contacts can have and share more than one address. An address deleted or modified by an administrator removes or updates all instances of this address. If an address is changed by an administrator or an end user at the account or contact level, the address will change for all of the contacts or accounts associated with that address.

5 **Create addresses for an account.** For more information, see "Creating Addresses for an Account" on page 56.

6 **Create account assessment templates.** For more information on creating assessment templates, see *Applications Administration Guide*.

7 **Assign account team members.** Account team members can be designated manually or automatically with the use of Siebel Assignment Manager. For information about manually assigning account team members, see *Applications Administration Guide*. For more information about using Siebel Assignment Manager, see *Siebel Assignment Manager Administration Guide*.

End-User Procedures

End users can perform the following procedures in any order:

- **Adding or modifying an account.** End users can add new accounts or modify certain information for existing accounts. For more information on these procedures see *Siebel Sales User Guide*.

- **Removing themselves from an account team.** End users cannot delete accounts but can remove themselves from the account team. For more information on removing yourself from an account team, see "Removing Yourself from an Account Team" on page 57.

- **Associate activities to an account.** For more information, see "Associating Activities with an Account" on page 57.

- **Add opportunities to an account.** For more information, see *Siebel Sales User Guide*.

- **Associate contacts with an account.** For more information, see "Associating Contacts to an Account" on page 60.

- **Associate addresses to an account.** For more information, see "Associating Addresses to an Account" on page 61.

- **Perform an account (or retail) assessment**. Account assessments can be used to compare accounts to each other or against a model, or to learn what is known (or not known) about the accounts and sales situations. For more information on performing retail assessments, see "Performing a Retail Assessment" on page 284.

- **Enter additional demographics information.** For more information, see "Adding Account Demographic Information" on page 62.

Administrator Procedures

This section provides instructions for the following procedures:

Adding or Modifying Accounts

When implementing Consumer Sector applications, you may decide to import account-related information from another database in your company, and avoid the need to enter this information manually. However, as you add new customers and as your existing customers add new retail outlets, you may need to create new accounts manually.

Before you add an account, find out whether you already have the account information in your database so that you do not enter information twice. To determine whether the account already exists in your database, query for values such as the company name, contact information, customer number, telephone number, or any other unique identifier.

Administrators can create addresses for accounts. Later, administrators or end users can associate these addresses with the appropriate accounts. Administrators can also edit existing addresses. Be careful when editing an existing address, because it will change the address for all accounts and contacts that are associated with that address.

For more information on querying your database for accounts, see *Fundamentals*.

Verifying whether an account exists can be done automatically if deduplication is active. For more information on deduplication, see *Siebel Data Quality Administration Guide*.

Administrator Procedures

To add an account

1 From the application-level menu, choose View > Site Map > Data Administration > Accounts and add a new record.

2 In the Account list or form, complete the necessary fields.

Some fields in the Account List are described in Table 6.

Table 6.   Selected Fields in the Account List

Field	Comments
Account Channel	Determines which type of distribution channel the account belongs to. Example values in this attribute are Sporting Goods, Athletic Specialty, and Apparel Specialty.
	LOV Type: ACCOUNT_CHANNEL
	For information about modifying list of values types, see *Applications Administration Guide*.
	For more information about the Account Channel attribute, see "About Account Market Segments" on page 78.
Account Class	In the standard Siebel Consumer Sector applications, this field is Customer by default, and is not updatable.
	However, the behavior of this field can be modified or the field can be removed through the use of Siebel Tools.
Account Team	List of employees who are working with this account. This list determines who can access information about the account. The primary team member can be determined by the system administrator or can be whoever created the account record.
Account Type	The type of account this is, for example, HQ, Distributor, or Retailer.
	LOV type:ACCOUNT_TYPE
	Action: Determines the account Profile form layout. The Profile form can be configured with Siebel Tools.
	For more information, see "Profiling an Account" on page 55.

Table 6.   Selected Fields in the Account List

Field	Comments
Address Line 1	An account can have multiple addresses. Click the select button to access the Account Addresses dialog box, where you can select an existing address or add a new one. Select the Primary field within the dialog box to specify the primary address.
	You can edit an existing address from the Account Addresses dialog box. However, changing this address will also change every instance of the address, that is, for all the other accounts and contacts that are associated with it.
Assignment Area Code	If you use area codes in your account assignment process, enter an area code.
	The Assignment Area Code value determines the area code that the Territory Assignment program will use to assign this account or subaccount.
Assignment Country Code	If you use country codes in your account assignment process, enter a country code.
	The Assignment Country Code value determines the country code that the Territory Assignment program will use to assign this account or sub-account.
Buying Group	Check this box if the account serves as a buying group for other accounts.
	For more information, see "About Buying Groups" on page 79.
Competitor	Check this box if the account is a competitor.
Current Volume	The weekly sales dollar volume of the manufacturer's products within the retail store.
Disable Cleansing	Check this box to disable cleansing for the account.
	For more information, see *Siebel Data Quality Administration Guide.*
Distribution Code	Can be used to define product distribution.
	LOV Type: RTL_PRFL_DIST_CODE
	For accounts to be subject to distribution lists, they must be assigned Distribution Codes.
	For more information about setting up distribution lists, see "Creating and Modifying Distribution Lists" on page 85.
Domestic Ultimate DUNS	The D&B D-U-N-S number belonging to the highest-level family member within a specific country.
DUNS Number	The D&B D-U-N-S number for the account.

Table 6.   Selected Fields in the Account List

Field	Comments
Expertise	Special skill or knowledge possessed by account; for example, Food Processing or Bottling.
	LOV Type: ACCOUNT_EXPERTISE
Global Ultimate DUNS	The D&B D-U-N-S number belonging to the account's worldwide ultimate parent account.
Industry	The type of industry the account is involved in; for example, manufacturing or service. You can enter multiple industries in this field.
Lock Assignment	Provides information for the Territory Assignment program.
	If you select Lock Assignment, the account team for the account will not be changed automatically by the Territory Assignment program.
Name	Account name.
No. of Consumers	The approximate number of consumers serviced by the retail outlet.
No. of Registers	Number of cash registers for checkout at the account.
Organization	The organization of which the account is a member.
Parent Account	The parent account of the selected account. For more information, see "Setting Up Account Hierarchies" on page 54.
Parent HQ DUNS	The D&B D-U-N-S number belonging to an account's immediate headquarters or parent account.
Parent Site	The site of the parent account of the selected account.
Partner	Check this box if the account is a partner.
Potential Volume	The potential weekly sales dollar volume of the manufacturer's products within the retail store.
Price List	Account specific price list; for example, Consumer Price List or North American Price List.

Table 6.   Selected Fields in the Account List

Field	Comments
Product Differentiator	Determines the types of products that should be available in the account's product catalogs.
	LOV Type: PRODUCT_DIFFERENTIATION
	Action: Drives visibility to account catalogs (including seasonal catalogs, if any), and products available for creating assortment plans.
	For more information about controlling product distribution to accounts, see "About Account Market Segments" on page 78.
Site	Description of the physical location or function of the account, such as "headquarters" or "corporate" or "San Francisco."
Status	The status of the account; for example, Active or Prospect.
	LOV Type: ACCOUNT_STATUS
Synonyms	A way to refer to accounts (and their sites) in the way that you prefer. For example, an account named A/B Products, Inc., might have the following synonyms: AB, A/B, and AB Products.
Visit Frequency	An integer value indicating the number of times per year a sales representative visits the account.
Weekly ACV	Weekly all-commodity volume.

Deleting Accounts

Deleting an account completely removes the account as well as all data related to the account, such as activities, contacts, and addresses, from the system.

If you are unsure whether the account is still active (and therefore should not be deleted), contact the primary account team member and inquire before modifying or deleting the account.

Administrators can remove themselves or others from the account team instead of deleting the record. End users can remove themselves from the account team, but they cannot delete records in the standard Consumer Sector applications. Removing yourself or others from the account team will remove this account from the visibility of the person no longer on the team.

An administrator can delete individual accounts manually, or delete accounts in batch using Enterprise Integration Manager (EIM). For information about EIM, see *Siebel Enterprise Integration Manager Administration Guide*.

To delete an account

1 From the application-level menu, choose View > Site Map > Data Administration > Accounts, and select an account.

2 From the Account form Menu drop-down list, select Delete Record.

Setting Up Account Hierarchies

For overview information about account hierarchies, see "About Account Hierarchies" on page 44.

To set up account hierarchies, you create parent-child relationships between accounts. The following is a list of guidelines for creating account hierarchies:

■ Accounts can have an unlimited number of child accounts.

■ Accounts can have only one parent account.

■ There is no limit to the number of levels you can establish within an account hierarchy.

■ Accounts can be defined as Buying Groups (an attribute flag of account).

■ Accounts can have an unlimited number of product categories and products associated with them.

■ Each account can have only one profile (based on Account Type).

■ An account can have unlimited associated assessments, and assessments can have many assessment values.

If your company uses the Sales Volume Planning module, you must create one contiguous account hierarchy with all the accounts to be included in the sales volume planning process. For instance, you might create a five-level hierarchy with your corporate headquarters at the top level, and your company's divisions at the second level. You could place the accounts representing all of your customers' headquarters offices in the third level. Distribution centers would be in the fourth level and retail outlets in the fifth level.

For more information on Sales Volume Planning, see Chapter 6, "Sales Volume Planning."

To create an account-subaccount (parent-child) relationship

1 From the application-level menu, choose View > Site Map > Data Administration > Accounts.

2 Verify that the parent account exists; if it does not, add it.

For more information about adding accounts, see "Adding or Modifying Accounts" on page 49.

3 Verify that the child account exists; if it does not, add it.

4 In the Accounts list, select the child account.

5 In the Account form, click the Parent select button.

6 In the Pick Account dialog box, select the Parent account and click OK.

NOTE: You cannot add a new account from the Parent Account field; the account must already exist. For more information about adding accounts, see "Adding or Modifying Accounts" on page 49.

Profiling an Account

Account profiles maintain and display information specific to the type classification of an account. For example, an account of type Retailer will have a different profile than an account that is of the type Distributor.

To profile an account

1 Navigate to the Accounts screen.

2 Select the account by performing a query in the list.

3 Click the Profile view tab.

The Profile form that appears on the Account Profile view depends on the type of account selected.

■ If the Account Type value is HQ, an HQ Profile form appears.

■ If the Account Type value is Retailer, a Retail Profile form appears.

4 In the Profile form, complete the necessary fields.

Creating Addresses for an Account

Administrators can create addresses for accounts. Later, end users can associate these addresses with the appropriate accounts. Administrators can also edit existing addresses. Be careful when editing an existing address, because it will change the addresses for all accounts and contacts that are associated with that address.

To create an address for an account

1 From the application-level menu, select View > Site Map > Data Administration > Addresses.

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

To associate an address to an account

1 Navigate to the Accounts screen.

2 Select the account by performing a query in the list.

3 In the Account form, click the Address Line 1 select button.

4 In the Account Addresses dialog box, query to find an address in the list, or click New to find additional addresses from which to choose.

End-User Procedures

This section provides instructions for the following procedures:

- To remove yourself as an account team member

- To add an activity for your account on page 58

- To chart account activities on page 60

- To associate multiple addresses to accounts on page 61

- To add demographic information to an account on page 62

Removing Yourself from an Account Team

Unlike administrators, end users cannot delete accounts. If end users need to remove an account from their My Accounts view, they need to remove themselves from the account team.

To remove yourself as an account team member

1 Navigate to the Accounts screen.

2 Select the account by performing a query in the list.

3 Click the Account Team view tab.

4 In the Account Team list, delete the row containing your name.

The change will be reflected in the application the next time you log in to the application.

Associating Activities with an Account

Siebel applications allow you to record many types of activities for a variety of reasons. One of the reasons to record an activity is to remind yourself to do something regarding an account. For instance, you might want to make note of a meeting with a contact at an account.

In the Account Activities view, you can:

■ Add new activities.

■ View all activities for an account.

■ Modify existing activities.

■ Drill down on any individual activity to view additional information.

■ Chart activities completed for an account.

To add an activity for your account

1 Navigate to the Accounts screen.

2 Select the account by performing a query in the list.

3 Click the Activities view tab.

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

Some fields in the Account-Detail Activities view are described in the Table 7.

Table 7.   Selected Fields in the Account-Detail Activities view

Field	Comments
Description	Description of the activity.
Activity	High-level description of activity as provided by an administrator. Provides hyperlink to Activity Attachment view.
	In the standard < YourProductName > applications, this field is General, by default, and is not updatable.
	However, the behavior of this field can be modified or the field can be removed with Siebel Tools.
Type	The specific type of activity to be performed, chosen from a picklist. Provides hyperlink to Visit Execution view.
	LOV Type: TODO_TYPE
	Action: Type chosen drives the dynamic drilldown to specific views.

Table 7.   Selected Fields in the Account-Detail Activities view

Field	Comments
Employees	Click the select button to assign employees to the activity from the Employees list.
	Depending on the type of activity created, this record will now appear on this person's My Activities calendar or to-do list.
Status	Current status of the activity, chosen from a picklist.
	LOV Type: EVENT_STATUS

For more information about activities and managing your calendar, see *Fundamentals*.

To chart account activities

1 Navigate to the Accounts screen.

2 Select the account by performing a query in the list.

3 Click the Charts view tab.

4 From the Charts Show drop-down list, select Activity Analysis.

This chart reflects all the activities associated with the account.

Associating Contacts to an Account

In the Accounts Contacts view tab, you can:

- Create new contacts

- View all contacts for an account

- Modify existing contacts

- Drill down on any individual contact's name to create activities for that contact and account

NOTE: Before adding a new contact be sure that the contact does not already exist by querying the All Contacts view. If the contact does not exist, you can enter a new contact from either the All Accounts View or the All Contacts view, and associate the contact with the appropriate account. For more information on querying, see *Fundamentals*.

For the procedure on adding and modifying contact information, see *Siebel Sales User Guide*.

Associating Addresses to an Account

An important part of maintaining accounts is keeping the addresses up to date, including billing and shipping addresses.

To associate multiple addresses to accounts

1 Navigate to the Accounts screen.

2 Select the account by performing a query in the list.

3 Click the Bill To/Ship To view tab.

4 Complete the fields in the Bill To/Ship To form.

NOTE: In the standard product, end users cannot edit addresses in this view, but can only associate addresses already entered by an administrator.

Adding Account Demographic Information

An account may provide service to many different consumers. You can add information about these consumers, such as size of household, income, and location, to your accounts.

Typically, an administrator imports this information into the Siebel database from a third-party source. If necessary, end users can add the information manually.

To add demographic information to an account

1 Navigate to the Accounts screen.

2 Select the account by performing a query in the list.

3 Click the Demographics view tab.

4 Complete the fields.

Products 4

This chapter highlights the procedures necessary to manage and use product and pricing information structures, including:

- Setting up and maintaining catalogs, categories, products, product features, and price lists for products.

- Accessing information about each product, such as key features, description, feature comparisons, and associated literature.

About Catalog and Product Administration for Consumer Sector

The Catalog Administration and Product Administration screens and associated views that appear in Siebel Consumer Sector share much of the functionality found in Siebel eBusiness Applications. This chapter focuses on the catalog and product administration functionality that is unique to Siebel Consumer Sector applications.

For details related to the following topics, please see the following references:

■ For controlling product distribution to the appropriate accounts, see Chapter 5, "Product Distribution."

■ For setting up and maintaining customizable products (products that can be interactively configured), see *Product Administration Guide*.

About Catalog Category Hierarchies

A product catalog is a collection of products arranged in a logical hierarchy of categories, according to your company's business needs.

Figure 1 shows a schematic of a sample catalog-category hierarchy, with the catalog at the root level. The catalog is parent to three categories, which are parents of more subcategories or of products.
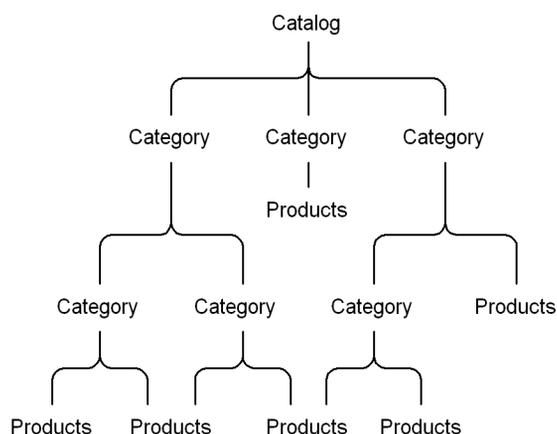
Figure 1.   Catalog Hierarchy

Product catalogs are organized by creating categories and structuring the categories and subcategories into parent-child relationships, to form a catalog category hierarchy. Products are then added to categories. For example, the parent category, Beverages, can contain the Ace Splash Refrigerated Juice subcategory, which contains all the Ace Splash brand refrigerated juice drink products. The Beverages category can also contain a subcategory for a different brand of beverages, Big Wave. When conducting a promotional campaign for company's line of beverages, you can use the category or subcategory definition, such as Big Wave, to be sure that only those associated products are included or are available to be included in the promotion.

For the purpose of using the Sales Volume Planning (SVP) module however, a category-subcategory hierarchy must be contiguous with only one designated SVP parent (root) category. For information about setting up category product hierarchies for SVP, see "Accessing the Sales Volume Planning Business Service" on page 123.

Business Scenario for Products

This scenario is an example of a workflow performed by a marketing administrator and a customer service representative. Your company may follow a different workflow according to its business requirements.

The marketing administrator for a beverage and vending machines manufacturing company is setting up and managing the company's products. The administrator sets up two catalogs for the company, Beverages and Vending Machines. He adds product categories and subcategories to each catalog, structured according to the business needs of his company. He then adds products, along with their details such as features, comparison features, and marketing literature. He creates product lines, and then associates products to their product lines. Finally, the administrator creates different price lists for various geographic locations, currencies, and customers.

A customer service representative from your company receives a call from a customer in California who is interested in one of your company's vending machines. By navigating through the Siebel application, the representative is able to describe the product's key features and component products. During the conversation, the customer expresses an interest in features that are available in a higher-end model. Immediately, the representative can provide the customer a feature-by-feature comparison of the two models and quote prices from the California price list. The representative can then follow up by sending the customer more detailed information, such as product brochures, through email or fax.

The service representative can also navigate through the Beverages catalog in helping the customer decide what to stock in the vending machine.

Example Workflow for Products

The following is an example workflow for marketing administrators and customer service representatives. Your company may follow a different workflow according to its business requirements.

Administrator Procedures

The following list shows procedures administrators typically perform to manage products.

1 **Set up a catalog.** To set up a catalog, you create the catalog, create multiple catalog categories, arrange the categories into a logical hierarchy, and associate products with categories. For more information, see *Siebel eSales Administration Guide*.

In Siebel Consumer Sector applications product categories, like products and accounts, can have the personalization attributes Account Channel and Product Differentiator applied. For information about using Account Channel and Product Differentiator fields, see Chapter 5, "Product Distribution."

In the standard Siebel Consumer Sector applications, catalogs do not have the fields Account Channel and Product Differentiator visible. To enable these personalization attributes for catalogs, see *Siebel Tools Reference*.

For information about setting up category product hierarchies specifically for the Sales Volume Planning (SVP) module, see "Accessing the Sales Volume Planning Business Service" on page 123.

2 **Define products.** For more information, see "Defining Products" on page 70.

3 **Provide greater detail to product records.** You can create product features, assign key features to a product, define related products, designate equivalent products, create comparison features for equivalent products, create product entitlements, associate literature with products and associate images with products. For more information, see *Product Administration Guide*.

4 **Define product lines.** For more information, see "Defining Product Lines" on page 73.

5 Create and manage price lists. For information about defining price lists, pricing models, and price line items, and specifying a price list for a product, see *Pricing Administration Guide*.

NOTE: With the ENTERPRISE_FLG set to N, the default setting, Database Extract only extracts organization Price Lists and Items specific to each organization. You may use Siebel Enterprise Integration Manager (EIM) to import Price Lists and Price List Items by organization. If EIM sets the ENTERPRISE_FLG to Y, all Price Lists and associated Price List Items will be routed to all users regardless of organization. For more information, see *Siebel Enterprise Integration Manager Administration Guide*.

End-User Procedures

Most of the tasks associated with products and price lists involve viewing information. An administrator is responsible for setting up product lines, products, and price lists.

The following list shows tasks you typically perform when working with Products. These tasks can be performed in any order.

■ **View products with Product Explorer.** For information on navigating the Product Explorer see "Using the Product Explorer" on page 74.

■ **View product information and associate attachments with products.** For information on querying to find products in the Products screen, or associating attachments with products, see *Fundamentals*.

■ **View and compare product key features and view product image.** For more information, see *Siebel Sales User Guide*.

Administrator Procedures

This section provides instructions for the following procedures:

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Defining Products

Use the Product Administration view to enter products into the Siebel database by creating product records. The only required field in the product record is the product name. However, you should also associate the record with a product line, category, and price list.

In the standard Siebel Consumer Sector applications, once a product record is created it cannot be deleted. To prevent a product record from being displayed in picklists and dialog boxes, edit the product record by deselecting Orderable, Sales Product and Service Product check boxes. You can also control display of the product by setting Effective Start and Effective End dates.

Your company may also choose to configure the application to allow administrators to delete products, or to delete products as part of the batch Enterprise Integration Management (EIM) process, or both. For more information on EIM processes, see *Siebel Enterprise Integration Manager Administration Guide*.

To create a product record

1 From the application-level menu choose View > Site Map > Product Administration.

2 In the Products list click New.

3 Click the Type select button, and select either AF (for an apparel and footwear product) or CS (for a consumer goods product), or any additional type that may have been configured for your company's implementation of the application.

4 Complete the fields.

Some of the fields in the Products list are described in Table 8. Note that the fields that are displayed may depend on the Type of product chosen.

Table 8. Selected Fields in the Product Administration View

Field	Comments
Account Channel	Specifies account channel distribution type, such as Apparel Specialty, Athletic Specialty, or Department Store. For more information, see "Setting Up Personalization Attributes" on page 90.
Accrual Rate	The accrual rate at which market development funds are accrued per case.
Case Conversion Factor	The value to multiply by the actual cases shipped to get standard or statistical cases shipped. Different products are compared using equivalent cases.
Case Pack	The number of individual selling units in a case.
Color	An individual product attribute. Typically used with those products that are classified as Type AF.
Gender	Targeted gender (male or female) for the product. In the standard Siebel Consumer Sector application this applies only to products of Type AF.
LOB	Line of business.
MTBF	Mean time between failures. A measure of the dependability of the instrument.
MTTR	Mean time to repair. A measure of the time required to repair an item.
Organization	Allows you to associate a product with an organization, and limit who can see it.
Name	The name of the product. This is a hyperlink to Product Detail Key Features Administration View by default.
Product Differentiator	Describes the type of products within any category that the account should carry. This value is used by Siebel Personalization to help determine the account's market segmentation. LOV Type: PRODUCT_DIFFERENTIATION
Product Line	The product line with which the product is associated. For information about creating product lines and associating products with product lines, see "Defining Product Lines" on page 73.

Table 8.   Selected Fields in the Product Administration View

Field	Comments
Sales Product	Indicates whether or not the product is a sales product. Specifies whether the product can be sold. If this flag is not checked, the product will not show up on the product picklist.
Carrier	Allows users to predefine a preferred carrier for a product. LOV Type: FS_CARRIER
Shipping	Allows users to predefine a preferred shipping method for a product. LOV Type: FS_SHIPPING_METHOD
Type	The type classification of the product. The application name, Consumer Sector, drives the dynamic Detail Product Form. In the standard product, if your company is using personalization attributes to determine the products that are available to accounts, you must select the Type AF. To configure your own Types, see *Siebel Tools Reference*. For more information about using personalization attributes or product distribution lists to control product distribution to accounts, see Chapter 5, "Product Distribution." LOV Type: PRODUCT_TYPE Action: Drives dynamic Detail Product Form
U of M	Unit of measure. The measure by which the product is sold. LOV Type: UNIT_OF_MEASURE
Unit Conversion Factor	The value to multiply by the actual units shipped to get equivalent or statistical units shipped. Different products are compared using equivalent units.

NOTE: To allow for viewing of competitor products, for example, in conducting retail audits, the competitor products must be present in the distribution list of the account. For a competitor product to be available to distribution lists, you must add it to your products list and then it can be associated with the account to be audited. For information on conducting retail audits, see Chapter 12, "Retail Execution."

For descriptions of additional fields that can be made visible using Siebel Tools, see *Product Administration Guide*.

Defining Product Lines

Product lines are logical groupings of products. When you define a product line, you name it and then specify all the products in that particular line. If you have products that have already been defined, you can associate them with the product line. You can assign product line managers.

To create a product line

1 From the application-level menu select View > Site Map > Application Administration > Product Line.

2 In the Product Line list, add a record and complete the necessary fields.

Some of the fields in the Product Line list are described in Table 9.

Table 9. Selected Fields in the Product Line List

Field	Comments
Product Line	The name of the product line to which products belong.
Product Line Manager	The name of the product line managers.
Products	The products associated with the product line. You can add or delete a product from a product line. A product can belong to more than one product line.
	A product must exist before it can be associated with a product line.

To associate a product with a product line

1 From the application-level menu select View > Site Map > Product Administration.

2 In the Products list, select a product.

3 From the More Info drop-down list, select Products.

4 Click the Product Line select button.

5 From the Product Lines dialog box, select the product line you want to associate with the product, and click OK.

End-User Procedures

This section provides instructions for the following procedure:

■ "To use the Product Explorer" on page 74

Using the Product Explorer

Explorer views in Siebel applications display information in a hierarchical, multi-pane format. The Product Explorer view has an explorer tree on the left, with folders arranged hierarchically, and a list on the right, representing the contents of the selected folder.

To use the Product Explorer

1 Navigate to the Products screen.

2 In the Products list select a product.

3 Click the Explorer view tab.

4 In the Explorer tree, find the page icon of the product for which you want information.

> **NOTE:** If the tree contains more products beyond those that are visible when you have scrolled down to the bottom, click the arrow at the bottom of the tree to display more.

5 Click the plus sign next to the page icon of the product to expand the item and reveal its contents.

6 Click the folder icons to view related Products, Attachments, Components, Price Lists, and Literature.

Available records appear as hyperlinks in the list to the right of the Explorer tree.

For more information on using Explorer views in Siebel applications, see *Fundamentals*.

Product Distribution 5

By following procedures in this chapter and the chapters referenced in it, you will be able to:

■ Set up and manage distribution lists

■ Specify account market segments

■ Set up and maintain buying groups

■ Specify source-of-supply suppliers

■ Manage size distribution

■ Assign merchandising locations to products

For information specific to product distribution and its relationship to Sales Volume Planning functionality, see Chapter 6, "Sales Volume Planning."

About Controlling Product Distribution

Distributing the right products to the right account is a key challenge for many companies. The Siebel Consumer Sector applications allow you to structure and track the distribution of a wide range of products to large numbers of accounts. In addition, you can control where the product is held within an account's premises.

Your company can control product distribution in the following ways:

■ **Manage distribution lists to automate product distribution.** By assigning distribution codes to categories, products, and accounts within a customer's product distribution account hierarchy, you build a distribution system that determines which products are distributed to each account.

For more overview information about distribution lists, see "About Distribution Lists" on page 77.

■ **Classifying accounts by market segment.** Classifying an account's market segment automates the product distribution process by controlling the products (or product categories) that will be available to that account for assortment planning, or that will be displayed in that account's product catalog. You classify your customer accounts' market segments by applying the personalization attributes Account Channel and Product Differentiator for each account, and each product or product category or both.

For more overview information about account market segments, see "About Account Market Segments" on page 78.

■ **Assigning product categories to an account.** Administrators or end users can manually assign specific product categories to specific accounts, so that only those products will be available for distribution through assortment plans.

■ **Creating buying groups.** *Buying groups* are accounts that act as product distributors, or suppliers, to their multiple member accounts. Buying groups can also help automate the management of assortment planning.

For more overview information about buying groups, see "About Buying Groups" on page 79.

■ **Creating sizes and size distribution.** You can establish the sizes available for each product or type of product your company manufactures. You can then establish the distribution of sizes, or quantity multiplier for each size, usually based on marketing trends. Establishing sizes and size distributions automates much of the process of designating sizes and quantities when sales representatives are assembling customer quotes or assortment plans.

■ **Designating merchandising locations.** You can assign multiple merchandising locations to an account.

About Distribution Lists

Most consumer goods companies are organized in a hierarchical structure, often based on the company's channels of distribution. Typically, marketing administrators create product distribution lists that control which of their company's products are available for distribution to their customer distributor accounts and the retail outlets they serve.

The Siebel Consumer Sector applications can use distribution codes to automatically create an account-product record, which is a *distribution list* of the products each account (within the product distribution account hierarchy) is authorized to receive. Distribution codes can be applied to the appropriate level of the product distribution account hierarchy for each of your customers, usually to the customer's distribution centers and to the outlets they serve, and to any or all of the products that your company manufactures. Each subaccount receives either the full set or a subset of products authorized for the key distributor accounts directly above that subaccount in the hierarchy.

Most consumer goods companies use one or both of the following distribution methods to supply their retail outlets:

■ **Direct distribution.** With this distribution method, the key account, usually the customer's own distribution center, is the sole intermediary between your company and the retail outlets.

■ **Indirect distribution.** With this distribution method, there is another intermediary such as a third-party distributor, called an *indirect account*, between the key account and the retail outlets.

Your company's products are authorized for retail distribution at the key account, indirect account, and retail outlet levels. This is called *retail product authorization*. With indirect distribution, distribution lists are built from the products available to the indirect account, which form a subset of the products from the key account distribution list.

For more information on creating distribution lists to control product distribution to accounts, see "Creating and Modifying Distribution Lists" on page 85.

About Account Market Segments

If you have multiple channel partners operating in the same locale, such as a shopping mall, you may want them to carry different sets of products to avoid unnecessary price reductions that ultimately erode the brand equity of your products. Companies in this situation, generally apparel and footwear manufacturers, determine the product mix that an account should carry based on the market segment of the account.

With Siebel Consumer Sector applications, you can use account personalization attributes to selectively display an account catalog with only the product categories and products that fit the account's market segment.

Administrators or key account managers can tag your company's products and accounts with the attributes Account Channel and Product Differentiator. The Account Channel determines which type of distribution channel the account belongs to, such as Apparel Specialty or Sporting Goods. The Product Differentiator determines the type of products the account should carry, such as Elite, Entry, or Performance.

Siebel Consumer Sector applications' prebuilt personalization rules control the content available, while end users create assortment plans for each account.

There are a number of predefined account personalization rules in the standard Siebel Consumer Sector applications. However, these rules can be modified by marketing administrators or business analysts to fit your company's specific business needs.

About Buying Groups

A *buying group* is an account (consisting of multiple member accounts) created to buy products at high volume, typically for the purpose of receiving discounted prices. All stores in a buying group can benefit by receiving products at prices lower than they would receive if they were purchasing independently.

Specific products can be associated with a buying group to determine the products available for distribution to the group members. Buying groups can help facilitate the assortment planning process. Buying groups can purchase products on behalf of their member accounts. End users in the process of planning assortments for products can check to see if their buying group has already planned to purchase some of the products in their assortment plan. If so, they can drop those from the plan and eliminate double ordering.

Business Scenarios for Product Distribution

The following business scenarios demonstrate how companies can use distribution hierarchies and personalization attributes to determine how their products are distributed among their accounts. These scenarios are examples of workflows performed by marketing administrators and key account managers. Your company may follow a different workflow according to its business requirements.

Controlling Product Distribution with Distribution Lists

The administrator at a large beverage manufacturing company is responsible for making sure that the right products are available for each customer account. He does so by controlling product distribution lists at the corporate level. These lists determine the set of products available at the key distribution account level of each account's hierarchy, and the subsets of products available to the accounts down the hierarchy. In addition, the administrator determines where various products should be displayed within retail outlets.

The Ace Corporation account consists of two distribution warehouses, Ace Corporation East and Ace Corporation West, which are used as distribution centers for Ace Corporation. Each warehouse supplies a number of retail outlets throughout North America. Ace Corporation headquarters determines which beverage items are stocked at each warehouse. In addition, Ace Corporation employs a third-party wholesaler, AnyCompany Distribution, to supply products to outlets within the state of Louisiana, in the United States.

The administrator enters the Ace Corporation account hierarchy for product distribution into the Siebel database. He includes the details that the Ace Corporation East and West accounts are Distributors and that AnyCompany Distribution is a wholesaler or supplier account for one or more of the Ace Corporation accounts in its product distribution account hierarchy.

He then establishes an authorized product distribution list for the Ace Corporation account product distribution hierarchy that is based on the inclusive distribution option. Both of Ace Corporation's distribution warehouses (Ace Corporation East and West) are given a distribution code of Premium for the category Fizz and a distribution code of Standard for the category Splash. This designation authorizes both warehouses to receive all of his company's beverage products that are part of the Fizz category, independent of product category, and all products in the Splash category that have a distribution code of Standard or Limited. However, since Louisiana bans the sale of alcoholic fruit drinks, the third-party wholesaler in Louisiana is not licensed to distribute them. The administrator gives the wholesaler a distribution code of Limited for the category Fizz, so that only the subset of his company's products that does not contain alcoholic fruit drinks gets shipped to this warehouse.

The key account manager is responsible for managing and updating the authorized product distribution lists, supplier references and source of supply for each of her key accounts. She notes that Ace Corporation East cannot meet the demand for beverage products for all the retail outlets it supplies, so she fulfills those outlets' needs by designating Ace Corporation West as the alternative supplier for those outlets in the account hierarchy for product distribution.

Finally, the key account manager specifies what percentage of the authorized product distribution list each warehouse supplies and designates merchandising locations for several of the products that will be available to Ace Corporation's outlets.

Controlling Product Distribution With Personalization Attributes

The administrator of a large apparel and footwear manufacturer is responsible for making sure that the right products are available for each customer account, based on that account's market segmentation. These products will then be available to the customer, based on predefined personalization rules, and sales representatives will be able to offer only appropriate products to the customers when creating assortment plans.

Typically, the apparel and footwear manufacturer bulk-loads the information about accounts and products into the Siebel database, including their account personalization attributes. The company product categories and products may already have personalization attributes applied to them. However, her company just acquired a new account, Retailer X, and the administrator needs to enter the information for this account manually. After adding the account, the administrator considers the account's market segmentation.

The Retailer X account consists of a regional headquarters and several retail outlets. The retail outlets are generally located in shopping malls where the apparel and footwear manufacturer's products are sold by several different stores. Maintaining brand equity is a consideration as the administrator decides which of the manufacturer's products should be available in Retailer X's outlets.

Because Retailer X sells high-end apparel and footwear to serious athletes, the administrator applies the account channel Sporting Goods, and the product differentiator Elite, to the headquarters account. When sales representatives create an assortment plan for Retailer X, or when the Retailer X product catalog is displayed, only the product categories and products tagged with the Sporting Goods or Elite attributes will be available.

One of the Retailer X outlets is located in a mall with two competitor stores carrying high-end sporting apparel and footwear; one competitor specializes in products for sports such as basketball and baseball, and the other sells apparel and footwear for serious runners. The administrator chooses to further refine the personalization attributes for this outlet of Retailer X by assigning specific categories of her company's products instead. She assigns the Cross-Training and Walking categories of products to the account catalog for this outlet, so that only Cross-Training and Walking category products will be available to this account.

The key account manager for Retailer X notices that one retail outlet is located in a small shopping mall where there is little brand representation for the manufacturer's apparel and footwear. The key account manager can assign this account the product differentiator Entry, which limits the number of the manufacturer's products available to the account. This decreases the choices of styles available to that outlet, and more accurately reflects the market segment for that outlet.

The key account manager chooses to create a buying group for most of Retailer X's outlets, so that the members can benefit from bulk purchase discounts.

Example Workflow for Product Distribution

This example workflow for product distribution is performed by marketing administrators and key account managers. Your company may follow a different workflow according to its business requirements.

Administrator Procedures

Because of the many options available for controlling product distribution in Siebel Consumer Sector applications, you must decide which of the procedures below are applicable to your company's business needs. The sequence in which the steps are performed depends on the features your company uses.

■ **Set up distribution codes.** To manage product distribution across the account hierarchy that is based on distribution lists, an administrator needs to set up distribution codes and assign sequence. For more information, see "To set up distribution codes" on page 87.

■ **Create or modify distribution lists.** If your company uses distribution codes to control product distribution, an administrator needs to establish product distribution lists. For more information, see "Creating and Modifying Distribution Lists" on page 85.

■ **Set up personalization attributes.** If your company uses account personalization attributes to control product distribution to accounts through assortment plans, you can use the values shipped with the standard product or change the values to meet your company's needs. For information on changing these values, see "Setting Up Personalization Attributes" on page 90.

■ **Assign personalization attributes.** To make effective use of account personalization attributes, administrators or end users must assign Account Channel and Product Differentiator values to your company's accounts, and product categories or products or both. For more information, see "Assigning Personalization Attributes" on page 93.

■ **Assign categories to account catalogs.** Administrators can manually assign the categories of products available to accounts. For more information, see "Assigning Product Categories to Account Catalogs" on page 93.

■ **Set up sizes and size distributions.** For products of type AF (apparel and footwear), administrators can indicate the sizes and size scales of the different products manufactured, as well as the distribution of sizes typically included in assortment plans or ordered for that product. For more information, see "Setting Up Sizes, Size Scales, and Size Distributions" on page 95.

End-User Procedures

After distribution lists have been created, the other tasks involved in product distribution can be performed in any order. However, specifying suppliers for products can be done only after buying groups have been created, because the suppliers are selected from the existing buying groups.

1 **View an account's distribution list products.** End users, such as retail sales representatives, can view lists of products authorized for retail distribution at each of their retail outlets. For more information, see "Viewing and Modifying Distribution List Products" on page 99.

2 **Modify a distribution list.** End users can add products outside of the distribution hierarchy (that is, *unauthorized* products) to subaccount distribution lists. For more information, see "Viewing and Modifying Distribution List Products" on page 99.

3 **Create an account-specific size distribution.** Individual accounts can have their own size distributions for assortment planning purposes. For more information, see "To modify a key account's distribution list" on page 100.

4 **View account catalogs.** End users can view the products in an account's catalog. For more information, see "Reviewing Account Catalogs" on page 102.

5 **Create a buying group.** A buying group account acts as a product supplier to its multiple member accounts. For more overview information about buying groups, see "About Buying Groups" on page 79. For more information about creating buying groups, see "Creating Buying Groups" on page 103.

6 **Specify suppliers for products.** You can specify multiple buying groups as suppliers for a single product. For more information, see "Associating Sources of Supply with a Product" on page 104.

7 **Associate account products with merchandising locations.** By associating an account's product with merchandising locations, you can assign a specific physical location for that product, such as one or more display locations within a retail outlet, or within a bin in a warehouse. For more information, see "Associating Account Products with Merchandising Locations" on page 105.

Administrator Procedures

This section provides instructions for the following procedures:

Creating and Modifying Distribution Lists

Typically, marketing administrators create distribution lists that control which of their company's products are distributed to a customer's distributor accounts and the retail outlets they serve.

Creating a Distribution List

Before creating a distribution list for a customer, you must already have created the appropriate distribution codes. Distribution codes impose a logic on the distribution of products across the account-category hierarchy that is either *inclusive* or *exclusive*. In both systems, the distribution codes govern how products move from key accounts to subaccounts.

With inclusive distribution, the sequence or *order*, which is assigned to a group of distribution codes in the list of values (LOV), is used to assign rank to accounts. For example, a number of outlets might have different distribution codes within the Beverages category. The distribution codes and the order that is assigned to those codes in an inclusive system is shown in Table 10.

Table 10.   Distribution Codes, Order, and Products in an Inclusive System

Distribution Code	Order	Subaccount Receives:
Premium	1	Premium, Standard, Limited
Standard	2	Standard, Limited
Limited	3	Limited

In an inclusive distribution system, subaccounts with the distribution code Premium receive the entire key account's list of beverages, that is, products with distribution codes Premium, Standard, or Limited. Outlets with the distribution code Standard receive a subset of the entire list, which includes products with Standard and Limited distribution codes. Outlets with the distribution code Limited in the Beverages category receive only those products with the distribution code of Limited.

With exclusive distribution, each distribution code defines a specific subset of products that is independent of the order assigned to the distribution codes. Table 11 shows an example of distribution codes and products that might be found in an exclusive distribution system.

Table 11.   Distribution Codes and Products in an Exclusive System

Distribution Code	Order	Subaccount Receives:
Premium	1	Premium
Standard	2	Standard
Limited	3	Limited

In an exclusive distribution system, outlets with the distribution code Premium in the category Beverages receive a subset of the key account's distribution list of products, which includes products that are part of the Premium category with distribution codes Premium. Outlets with the distribution code Standard for the category Beverages receive a subset of the entire list, which includes only those products with the distribution code of Standard in the Beverages category. Outlets with the distribution code Limited in the category Beverages receive only the products with the distribution code of Limited in the Beverages category.

You can also add unauthorized products to subaccount distribution lists. An *unauthorized product* is a product that is added to a subaccount's distribution list outside the inclusive or exclusive distribution system.

To set up distribution codes

1 Navigate to Site Map > Application Administration > List of Values.

2 In the List of Values screen, in the Type column, query for RTL_PRFL_DIST_CODE.

   The query results show all the account distribution codes that have been created.

3 In the Order column, assign a different number to each distribution code to create a sequence.

   NOTE: The sequence that is applied to this LOV determines the order in which the distribution codes appear on the Dist. Code list. The sequence does not impose organization, but applies a rank in an inclusive distribution system.

To create an account distribution list and define subaccounts

1 Navigate to Site Map > Authorized Distribution List Administration.

2 In the Accounts view, select the account for which you intend to create an account distribution list by performing a query in the list.

> **NOTE:** For direct distribution, this key account should represent a key distribution point for the customer, such as a distribution warehouse. For indirect distribution, it should be the key account responsible for indirect distribution, such as a third-party distributor.

3 Optional. Check the Inclusive field to assign inclusive distribution properties.

4 Click the Authorized Accounts view tab.

5 In the Authorized Accounts list, click New.

6 In the Pick Account dialog box, select an account to add as a subaccount to this key account, click OK, and fill in the necessary fields.

Some of the fields in the Authorized Accounts list are described in the following table.

Field	Comments
Account Channel	Determines which type of distribution channel the account belongs to.
Distribution Code	Determines the products that this account receives. LOV Type: RTL_PRFL_DIST_CODE
Category	Determines the category of products this account receives.

> **NOTE:** You can create multiple records for one subaccount. Each record for the same subaccount must have a different category and each category may have a different distribution code.

To define products for an account distribution list

1 Navigate to Site Map > Authorized Distribution List Administration screen.

2 In the Accounts view, select the account for which you intend to define products by performing a query in the list.

3 Click the Authorized Category Products view tab and click Category.

4 In the Select Category dialog box, query for a product category to add to this account's distribution list and click OK.

All products in the selected category appear in the Authorized Category Products list, and the Categories list displays the selected category.

5 In the list of Authorized Category Products, assign the appropriate Distribution Code to each product.

NOTE: By default, the distribution code in the Categories list is the distribution code of the associated record in the Authorized Category Products list, although you may change it to a different code.

6 Optional. Click New in the Authorized Category Products list to add a new product without a category.

7 In the Categories list, assign the appropriate Distribution Code to each product-category record.

In this list, you can define multiple category-distribution-code combinations to a product.

8 Click Apply to propagate the key account's distribution list to the subaccounts that are associated with this account.

9 Repeat Step 3 through Step 8 for each additional product you want to add to the account's distribution list.

10 Click the Authorized Distribution List view tab.

All the subaccounts are listed with the categories and products that have been assigned to them.

NOTE: To view competitor products, for example in conducting retail audits, the competitor products must be present in the distribution list of the account. Only administrators can add competitor products to end user's products list. End users responsible for account audits can then associate competitor products with the account they plan to audit.

To delete a product from a key account distribution list

1 Navigate to Site Map > Authorized Distribution List Administration > Accounts > Authorized Accounts.

2 Select the key account for the distribution list by performing a query in the list.

3 Click the Authorized Category Products view tab and query for the product you want to delete.

4 Click Delete.

The product is deleted from the key accounts distribution list. It is also deleted from the subaccounts distribution list if the key account is the sole supplier of the deleted product.

Setting Up Personalization Attributes

To make effective use of personalization, administrators or end users must select values for the following two fields for each of your company's accounts and product categories, or products or both:

■ **Account Channel.** Determines which type of distribution channel the account belongs to. Example values in this attribute are Apparel Specialty and Athletic Specialty.

■ **Product Differentiator.** Determines the type of products within any category that the account should carry. For example, an account with a Product Differentiator value of Performance should be carrying products that cater to athletes.

NOTE: If no values are selected for these fields, they are treated as having null values. Accounts with null Product Differentiation and Account Channel values are matched with product categories and products that have null values in those fields.

Predefined values for these two attributes are included in the seed data for standard Siebel Consumer Sector applications under the list of values (LOV) types ACCOUNT_CHANNEL and PRODUCT_DIFFERENTIATION. You can add new values or change any of the existing values, which are:

■ ACCOUNT_CHANNEL: Apparel Specialty, Athletic Specialty, Sporting Goods, Department Store

■ PRODUCT_DIFFERENTIATION: Core, Entry, Elite, Statement, Performance, Authentic

For the procedure to add or change a value in the LOV, see *Applications Administration Guide*.

Personalization rule sets in the standard Siebel Consumer Sector applications that are most relevant to targeting customers based on market segmentation are described in Table 12.

Table 12.   Siebel Consumer Sector Personalization Rules

Rule Set	Description	Applicable Form or List
Catalogs	Determines what catalogs should be shown based on an account's profile attributes. In the standard product, this rule set matches values stored in the account channel attribute of the account and catalog objects. In the standard product, catalogs do not have the fields Account Channel and Product Differentiator visible. To enable these personalization attributes for catalogs, see *Siebel Tools Reference*.	Product Catalog Form
Categories	Determines what categories within a catalog should be shown for an account. This rule set checks for entries in the Catalog Account Categories table and displays only categories that exist in the table.	TAF Product Catalog Category List
Products	Determines what products will be displayed based on the account's profile attributes. In the standard product, this rule set matches values stored in the account channel and product differentiation attributes of the Account and Product objects. It also checks the effective dates of a product and displays those that are within the season of the catalog.	TAF Assortment Plan Product List

Other personalization rule sets are included in the standard Siebel Consumer Sector application, and you can create additional rule sets. For information about creating or modifying personalization rule sets, see *Personalization Administration Guide*.

Assigning Personalization Attributes

To take full advantage of the product distribution functionality using personalization rules, you must assign Account Channel and Product Differentiator attributes to accounts and products. The attributes can also be assigned to product categories.

NOTE: In the standard Siebel Consumer Sector applications, products must be of type AF to be assigned Account Channel and Product Differentiator Attributes.

The following sections provide procedures for assigning and setting up account channel and product differentiators:

■ To assign personalization attributes to accounts, see "Adding or Modifying Accounts" on page 49.

■ To assign personalization attributes to products, see Chapter 4, "Products."

Assigning Product Categories to Account Catalogs

The product categories and products available for inclusion in an account's catalog can be controlled by using personalization attributes and rules, as described in "About Account Market Segments" on page 78.

At times, however, an administrator may want to override the personalization rules to further refine the products or product categories that are available to an account. In this case, the administrator assigns exactly the categories of products available for inclusion in an account's catalog in the Account Categories view.

NOTE: If you assign one or more categories to an account through the Account Category view, only those categories will be available for inclusion in the account's catalog. No categories will be available based on personalization rules; the rules are instead overridden by your category assignments.

To assign categories to an account

1 From the application-level menu, select View > Site Map > Catalog Administration > Account Categories.

2 In the Accounts list, select an account.

3 In the Categories list, click New.

4 In the Add Category dialog box, select the category or categories to add and click OK.

Setting Up Sizes, Size Scales, and Size Distributions

The seed data included with Siebel Consumer Sector applications contains an LOV type called SIZE_RUN_TYPE to support the creation of size scales and size distributions. The SIZE_RUN_TYPE type consists of a two-level hierarchy of values, as shown in Figure 2. The first-level value specifies the products or product lines that are to be given size values, such as apparel, footwear, belts, or hats. The seed data includes the types Apparel and Footwear. Each of these values has a second level, or Child List of Values, which specifies the complete range of sizes for the products or product lines. Examples of ranges of sizes for an Apparel size type would be 2, 4, 6, 8 and S, M, L, XL. These values could also include sizes for footwear product lines.
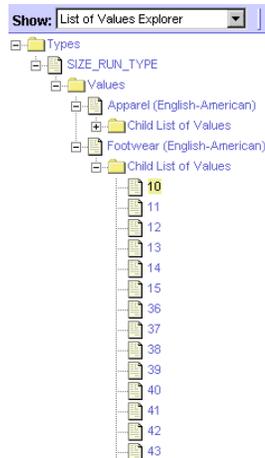

Figure 2.   List of Values Explorer Showing SIZE_RUN_TYPE Hierarchy

NOTE: Size scales and size distributions can be created only for products of type AF.

Creating Size Type Values and a Child List of Values

To set up sizes and size distributions, you must complete the SIZE_RUN_TYPE LOV hierarchy by performing the following tasks, in this order:

1 Create any additional size type values needed for each of your company's lines of business or product lines.

2 To each size type value, add all the possible sizes manufactured by your company.

If a size type encompasses products sold in countries with different size systems, the size type should include values for every size in which your products are available. For instance, for a size type representing shoes sold in both the United States and Great Britain, you might create values for sizes 5 through 15 and sizes 36 through 46.

For more information on adding types or changing values in the List of Values hierarchy, see *Applications Administration Guide*.

Creating a Size Scale

A size scale specifies a group of all the available sizes for a product or product line. A product or product line may have multiple size scales to reflect the various size conventions used in different parts of the world.

For instance, for men's shoe products sold in Europe, your company might use a size scale that includes nine sizes ranging from 39 to 47. For sales of the same shoes in North America, your company might use a size scale that includes nine sizes ranging from 5 to 13.

Another example of a size scale would be a product line that includes both T-shirts and dresses. You might create a size scale for the T-shirts consisting of the sizes XS, S, M, L, and XL, and a second size scale for the dresses consisting of the sizes 2, 4, 6, 8, 10, 12, and 14. Both size scales would be a women's apparel product line, but their values would differ greatly.

NOTE: The size values within a size scale can include only those specified in the SIZE_RUN_TYPE list of values hierarchy. For information on creating this hierarchy, see "Setting Up Sizes, Size Scales, and Size Distributions" on page 95.

To create a size scale

1 From the application-level menu, choose View > Site Map > Data Administration > Size Scale.

The Size Scale and Size Range lists appear.

2 In the Size Scale list, add a new record and complete the necessary fields.

Some of the fields in the Size Scale list are described in the following table.

Field	Comments
Name	A unique name to describe the size scale; consider naming conventions carefully for your company's business needs.
Type	The types available from the Pick Size Run dialog box are limited to the values contained in the SIZE_RUN_TYPE list of values hierarchy. For more information, see "Creating Size Type Values and a Child List of Values" on page 96.

3 With the record you created in Step 2 selected, add a new record in the Size Range list and complete the necessary fields.

Some of the fields in the Size Range list are described in the following table.

Field	Comments
Sort Sequence	Rather than sort a list of sizes alphabetically, a number is given to sizes so they can sort numerically. For example, with Small (S) = 1, Medium (M) = 2, the sort sequence will be Small (S) first and Medium (M) second.
Sizes	Select all the sizes applicable to the size range.

4 Repeat Step 3 for every size available for the selected size scale for that product or product line.

Creating Size Distributions

A *size distribution* specifies quantities for each size within an apparel or footwear product type. Typically, a size distribution is created to reflect historical consumption trends. For example, the size distribution for men's casual shirts might specify the following size proportions: two smalls, three mediums, four larges, and two extra-larges.

Account representatives or buyers can use size distributions to facilitate the allocation of their products' appropriate size quantities when assembling a quote. The user selects a size distribution and a multiplier for each of the products the user is including in a quote. The application then uses the size distribution proportion and the quote multiplier values to calculate size-specific quantities and total quantities for each product.

Size scales must be created before size distributions. For information on creating size scales, see "Creating a Size Scale" on page 96.

To create a size distribution

1 From the application-level menu, choose View > Site Map > Data Administration > Size Distribution.

   The Size Distribution and Size Distribution Proportion lists appear.

2 In the Size Distribution list, add a record, complete the necessary fields, and step off this record to populate the child Size Distribution Proportion list.

3 In the Size Distribution list, reselect the record you just created.

4 In the Size Distribution Proportion list, add a new record.

5 Select a Size value.

6 Enter a quantity in the Size Proportion column.

7 Repeat Step 4 through Step 6 for each size you want to include in the size distribution.

End-User Procedures

This section provides instructions for the following procedures:

Viewing and Modifying Distribution List Products

End users can view the products on an account's distribution list, add unauthorized products to a subaccount's distribution list, and modify an account's distribution list.

To view an account's distribution list products

1 Navigate to the Accounts screen.

2 Select the account by performing a query in the list.

3 Click the Distribution view tab.

The Distribution list for that account appears.

NOTE: In the standard Siebel Consumer Sector applications, you can add additional products to this account's distribution list from the Distribution view.

To add unauthorized products to an account's distribution list

1 Navigate to the Accounts screen.

2 Select the appropriate account by performing a query in the list.

3 Click the Source of Supply tab.

The account's Product distribution list appears.

4 In the Products list, click New.

5 From the Pick Product dialog box, select a product to add to the account's distribution list, click OK, and fill in the necessary fields.

Some of the fields are described in the following table.

Field	Comments
Distribution Code	Determines the products that this account receives. LOV Type: RTL_PRFL_DIST_CODE
Account Code	Retailers use this code to identify the product.
Sequence Code	Specifies the aisle on which the product will appear in the display sequence at the outlet. LOV Type: ACCNT_PRD_SEQ_CD

NOTE: A product that is manually added to a subaccount's distribution list is unaffected by changes made at the key account level.

To modify a key account's distribution list

1 Navigate to the Accounts screen.

2 Select the key account for the customer's distribution list by performing a query in the list.

3 Click the Source of Supply view tab.

The Product Distribution and Source of Supply lists appear.

4 Modify the Product list as necessary. You can:

- Add new products to the Products list.

- Alter the sequence code.

- Assign the product a status of active or inactive.

- Change the distribution code.

Creating Account-Specific Size Distributions

End users, such as account representatives, can create account-specific size distributions for use by other account representatives or buyers for the account. End users create account-specific size distributions that meet the needs of individual customers in the Size Distribution view.

To create account-specific size distributions

1 Navigate to the Accounts screen.

2 Select the account for which you wish to change size distributions by performing a query in the list.

3 Click the Assortment Profile view tab.

4 From the Assortment Profile Show drop-down list, select Size Distribution.

5 In the Size Distribution list, add a new record.

6 Select a Size Scale and click OK.

7 Complete the remaining fields and click Save.

The sizes and size proportions for the size scale you selected are displayed in the Size Distribution Proportion list.

8 In the Size Distribution Proportion list, select a size record.

9 Enter a quantity in the Size Proportion field.

10 Repeat Step 8 and Step 9 for each size whose proportion you want to change.

Reviewing Account Catalogs

Account catalogs contain detailed information about the categories and products your company has made available to be ordered by a specific account.

If you are an account manager with responsibility for creating assortment plans, quotes, and orders, you will find account catalogs to be a valuable resource. They provide information about the products that are available for inclusion in the assortment plans you are creating. You can review catalogs in preparation for a visit or telephone call with an account's buyer. If you use Siebel Consumer Sector applications on a laptop computer, you can display the catalogs as you meet with buyers, allowing them to view prices and other critical information about your company's products for upcoming seasons.

To review an account catalog

1 Navigate to the Accounts screen.

2 Select an account by performing a query in the list.

3 Click the Account Catalogs view tab.

A list of catalogs for the account you selected appears in the Account Catalogs list.

4 In the Account Catalogs list, drill down on the Catalog Name hyperlink.

The Catalogs More Info view appears.

5 In the Catalogs list, drill down on the Catalog Name hyperlink a second time.

The Catalog Categories view appears. The Categories list displays the categories of the chosen catalog and the Category Details form displays the highest-level category.

6 Click on the Products view tab.

The Categories Products view appears.

You can review:

■ The category hierarchy in the Categories list

■ Product details, by clicking on the product name hyperlink

Creating Buying Groups

A buying group account acts as a product distributor, or supplier, for its multiple member accounts.

To create buying groups, you must complete these tasks. The first three tasks must be completed in the order shown:

1 Create a buying group account, or designate an existing account as a buying group.

2 Associate member accounts with the buying group account.

3 Associate products with the buying group.

4 Optional: Associate specific buying group member accounts with specific buying group products.

To create a buying group

1 Navigate to the Accounts screen.

2 Add a new buying group account, or select an existing account by performing a query in the list.

For information on creating accounts, see Chapter 3, "Accounts."

3 Click to put a check mark in the Buying Group field of the account form.

The Account Attribute Flag is now Buying Group, and member accounts can be added to this buying group.

To associate member accounts with a buying group

1 Navigate to the Groups screen.

2 From the Show drop-down list, select Buying Group Accounts.

The Buying Groups form and the Accounts list appear.

3 From the Buying Groups form, query to select the appropriate buying group.

The accounts that are already members of that buying group appear in the Accounts list.

4 In the Accounts list, click New.

5 From the Add Accounts dialog box, select the account or accounts you want to designate as members of the buying group and click OK.

To associate products with a buying group

1 Navigate to the Accounts screen.

2 Select a buying group account by performing a query in the list.

3 Click the Source of Supply view tab.

The Products and Source of Supply lists in the Product Distribution Supplier Administration view appear.

4 In the Products list, click New.

5 Click the Product select button.

6 From the Pick Product dialog box, select the product you wish to add, and click OK.

7 Repeat Step 4 through Step 6 for each product you want to add.

Associating Sources of Supply with a Product

End users can specify sources of supply for the products on a distribution list. You can associate multiple sources of supply with a single authorized product. This helps key account managers understand the distribution patterns of supply for the various accounts and buying groups.

To associate sources of supply with a product

1 Navigate to the Accounts screen.

2 Select the account by performing a query in the list.

3 Click the Source of Supply view tab.

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

5 Highlight the products for which you wish to designate a source of supply and in the Products list, and click New.

6 Click the Buying Group select button.

   The Pick Account Suppliers dialog box appears.

7 In the Pick Account Suppliers dialog box, select the supplier you want to associate with the product, and click OK.

8 Complete the necessary fields.

   Some of the fields in the Source of Supply list are described in Table 13.

Table 13. Selected Fields Found in the Source of Supply List

Field	Comments
Percentage	The percentage of the total product order that is coming from the particular supplier.
Primary Flag	Check this field if you want the supplier to be the primary source.
Site	The location of the buying group.

Associating Account Products with Merchandising Locations

By associating an account's authorized product with merchandising locations, you can assign a specific physical location for that product, such as one or more display locations within a retail outlet, or within a bin in a warehouse. A product may have multiple merchandising locations.

To associate products with account merchandising locations

1 Navigate to the Accounts screen.

2 Select the account by performing a query in the list.

3 Click the Merchandising Locations view tab.

4 In the Merchandising Locations list, add a new record and fill in the necessary fields.

   Some of the fields in a Merchandising Locations record are described in the following table.

Field	Comments
Asset	A product the customer owns, typically acquired through contract or purchase. For consumer goods companies, this is typically a type of merchandising or display unit.
Asset Number	Automatically populated upon selection of asset in Asset field.
Layout Order	Specifies the order in which the products or merchandising locations appear, to facilitate retail audits. An example is side-by-side.
Inventory Name	Describes the general location of the products (inventory) in the exact merchandising location being specified. Examples are On-site, Display, and Warehouse. LOV Type: EVENT_MATERIAL_STATUS
Type	The type of merchandising location. Values include Bin, Aisle, Shelf, Trunk, Virtual, and Warehouse. LOV Type: FS_INVLOCTYPE_TYPE

5 From the Merchandising Locations list, choose the appropriate merchandising location.

6 In the Products list, click New.

7 In the Account Product dialog box, select the products to add to the merchandising location and click OK.

8 Repeat Step 5 through Step 7 until you have added all the products you want to add to the merchandising location.

Information for Configurators

This section contains information that may be useful to configurators making changes to the product distribution features.

The procedures documented in this chapter may include one or more buttons that invoke specialized methods, as described in Table 14.

Table 14.   Buttons and Methods for Product Distribution Configuration

Button	Name of Method	Description	Supported On
Apply	OnAssignProductToSubaccount	Applies all authorized products and categories of a key distributor account down to its subaccounts in accordance with either inclusive or exclusive logic.	Business Component Layer
Category	ShowPopup	Brings up a dialog box of categories.	Applet Layer
OK	AddCategoryProducts	Adds the category and the products associated with it to the parent account.	Applet Layer
Delete	DeleteSelected	Marks the selected S_ORG_PROD and S_ORG_DIST_LST records in Authorized Products view to be deleted for the parent account and its subaccounts. Triggers the business service SIA CS ADL Delete Business Service, which in turn calls the "DeleteExtra" method. The "DeleteExtra"method deletes the marked S_ORG_PROD and S_ORG_DIST_LST records.	Applet Layer

Information for Configurators

Sales Volume Planning 6

This chapter describes setting up and performing sales volume planning (SVP). Sales volume planning is the process of projecting upcoming sales within a specified time period.

About Sales Volume Planning

Companies use sales volume planning as part of their annual forecasting process based on the following data:

■ Baseline

■ Incremental

■ Target

■ Shipment

■ Consumption

These five data sets make the sales volume planning process possible and provide feedback, in the form of baseline and target quantities, for current and future sales volume plans. This data may be developed internally or supplied by a third party. Refer to Table 15 on page 111 for definitions and sources of these data sets.

NOTE: This chapter uses the term *quantity* to represent any amount in sales volume planning. You can also use a monetary amount, such as currency, in sales volume planning. However, you cannot execute sales volume planning using quantity and monetary amounts at the same time.

Companies should perform complex trending and data modification on the initial load of historical records, such as shipment history, *before* importing this data into Siebel base tables.

Table 15.   Sales Volume Planning Data Sets

Data Set	Definition	Sources
Baseline	The amount of volume that would have been sold in the absence of a promotional event	■ Customer warehouse withdrawal information provided by a customer to the manufacturer or from a third-party data source ■ Shipments to accounts information
Incremental	The amount of volume sold over and above baseline that can be attributed to a promotional event	■ Derived by calculating the difference between customer warehouse withdrawals, or shipments, and baseline ■ Provided by a third-party data source ■ Precalculated by incorporating lift matrices or using an educated estimation
Target (Also referred to as quota or objective)	The amount of volume a manufacturer expects its sales force to sell in a given period	■ Based on a factor or shipments, baseline, or consumption data from a prior period ■ The factor is most often a growth or decline rate expected for the upcoming period
Shipments	The amount of product shipped to customers	■ Virtually always stored in, and imported from, an order processing system or customer data warehouse
Consumption	The amount of product purchased and used by consumers	■ Usually provided by a third-party data source ■ May be derived by using customer warehouse withdrawals as a proxy

Business Scenario

This scenario is an example of a workflow performed by sales volume planning administrators and managers. Your company may follow a different workflow according to its business requirements.

A sales volume planning administrator for a large beverage manufacturer knows that her company is entering its annual planning period as of September. During this period, each member of the company's selling organization commits to a sales target for the next year (which begins in January). Her company develops its sales targets by first developing baseline quantities, which are established by sales volume planning administrators, and based on shipment data from the preceding year. This information will have been previously imported from third-party systems into Siebel Consumer Sector base tables.

The process begins with establishing a basis for the distribution of the baseline (the basis is the percentage distribution of account-products by period). Her company has determined that shipments for the past 12 months, adjusted for trends, will be used as the basis. As a planning administrator, she populates the Baseline Basis field for the upcoming year based on trended shipments for the past 12 months. She then copies the baseline basis into the Baseline Planning field and allocates this basis down the account-product hierarchy.

Next, she notifies regional sales managers, who modify the baseline planning quantities for their regions based on how they believe their markets will perform over the next 12 months. After each change, the regional sales managers allocate the baseline planning quantity down the account-product hierarchy. After all of the changes have been made, the entire account-product hierarchy is aggregated from the lowest level to the highest level, to reflect these changes. The baseline planning quantity is then copied to the Baseline Quantity field.

After determining the Baseline Quantity field, regional sales managers can reference this field to review business and plan trade promotions for their accounts. When planning trade promotions, managers reference the baseline quantity for the promotion period and enter anticipated incremental volume. Sales volume planning administrators periodically aggregate the latest incremental quantity forecast and export it to complement demand planning.

Example Workflow for Sales Volume Planning

The following sections describe the workflow for sales volume planning, performed by sales volume planning administrators and managers. Your company may follow a different workflow according to its business requirements.

Administrator Procedures

Administrator procedures for sales volume planning are as follows:

1 **Establish category-product hierarchies.** For more information, see "Setting Up Category-Product Hierarchies" on page 117.

2 **Establish account-categoryaccount-category hierarchies.** For more information, see "Setting Up Account-Category Hierarchies" on page 120.

3 **Create sales volume planning periods.** You must create periods to represent the units of time you will be working with in the sales volume planning process. For information on creating periods, see Chapter 2, "Getting Started."

4 **Set up Siebel Workflow Manager for sales volume planning.** The Sales Volume Planning module uses Siebel Workflow Manager to perform actions in the sales volume planning process, such as Build Tree and Allocate. For more information, see "Setting Up Siebel Workflow Policies for Consumer Sector" on page 38.

5 **Optional: Modify the Sales Volume Planning business service.** For more information, see "Accessing the Sales Volume Planning Business Service" on page 123.

6 **Import sales volume planning data.** The sales volume planning administrator imports the data that will be used in the sales volume planning process. You import sales volume planning source data, such as baseline, target, shipment, or consumption data, using Siebel Enterprise Integration Manager (EIM). This data can then be used as the source records for your upcoming sales volume planning actions. For information on using EIM, see *Siebel Enterprise Integration Manager Administration Guide*

The Sales Volume Planning module uses predefined interface tables for importing source data. For more information, see *Interface Tables Reference for Siebel Industry Applications*.

NOTE: Sales volume planning source data is recorded at the lowest level of your account and product hierarchies. Therefore, when importing sales volume planning source data, you must import this data at the lowest level of your hierarchies — for example, at the Ship To-SKU level.

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7 **Establish a baseline basis.** After importing the sales volume planning data, the sales volume planning administrator copies it to the Baseline Basis Quantity field. For more information, see "Establishing a Baseline Basis Quantity" on page 123.

8 **Copy the baseline basis to the Baseline Planning Quantity field.** The sales volume planning administrator copies the baseline basis to the Baseline Planning Quantity field. For more information, see "Copying Baseline Basis Quantity to Baseline Planning Quantity" on page 128.

At this point, sales volume planning administrators release the imported sales volume planning data to their senior managers. These managers modify the data to reflect their particular markets and allocate the modified quantities down the account-product hierarchy. For more information, see "Adjusting Sales Volume Planning Source Data" on page 142.

9 **Copy the Baseline Planning Quantity field to the Baseline Quantity field.** After senior managers have modified and allocated the baseline planning quantities, the sales volume planning administrator copies the Baseline Planning Quantity field to the Baseline Quantity field. For more information, see "Copying Baseline Planning Quantity to Baseline Quantity" on page 130.

10 **Build account-product trees.** For more information, see "Building Account-Product Trees" on page 132.

11 **Populate account-product tree locks.** For more information, see "Populating Account-Product Tree Locks" on page 136.

12 **Optional: Manually enter sales volume planning data.** Marketing administrators can manually enter sales volume planning data for the purposes of training or test. For more information, see "Manually Entering Sales Volume Planning Data" on page 136.

13 **Maintain the account-product tree.** Marketing administrators maintain the account-product tree by resetting the levels and locks of the tree. For more information, see "Maintaining an Account-Product Tree" on page 137.

End-User Procedures

End-user procedures for sales volume planning are as follows:

1 **View sales volume planning data.** For more information, see "Viewing Sales Volume Planning Data" on page 139.

2 **Adjust the sales volume planning source data.** For more information, see "Adjusting Sales Volume Planning Source Data" on page 142.

3 **Modify the planning quantity.** For more information, see "Locking and Modifying the Planning Quantity" on page 143.

Administrator Procedures for Sales Volume Planning

This section provides instructions for the following procedures:

■ To set up category-product hierarchies on page 117

■ To associate products with categories on page 118

■ To adjust category, subcategory and product hierarchies for sales volume planning on page 119

■ To create an account-category hierarchy on page 120

■ To create an account subcategory hierarchy on page 121

■ To modify an account-category hierarchy on page 122

■ To delete an account-category hierarchy on page 122

■ To access the Sales Volume Planning business service on page 123

■ To generate a baseline basis quantity on page 124

■ To precalculate an adjusted baseline basis quantity on page 126

■ To copy the Baseline Basis Quantity to the Baseline Planning Quantity on page 128

■ To copy the Baseline Planning Quantity to the Baseline Quantity on page 130

■ To build an account-product tree on page 132

■ To populate account-product tree locks on page 136

■ To manually enter account-product data on page 137

■ To manually enter account-category-product data on page 137

■ To reset account-product tree levels on page 137

■ To reset account-product tree locks on page 138

Setting Up Category-Product Hierarchies

You must establish explicit category-product hierarchies before beginning the sales volume planning process. Categories and products that are participants in sales volume planning must have a single designated sales volume planning parent category.

To set up category-product hierarchies

1 From the application-level menu, choose View > Site Map > Catalog Administration > All Categories.

2 In the Categories list, add a new record and complete the necessary fields.

Some of the fields in a Categories record are described in the following table.

Field	Comments
Category Name	The name of the category in the category-product hierarchy.
Parent SVP Category Name	The parent sales volume planning name of the category (for example, All Products). This field is automatically populated when category-subcategory relationships are established later.
SVP Level	The sales volume planning level of the category. This field is automatically filled in when an association to a subcategory is made.
Description	A description of the category-product hierarchy.
Effective Start Date	The starting date and time of the category.
Effective End Date	The ending date and time of the category.
Catalog Name	The name of the catalog associated with category-product hierarchy.

3 Repeat Step 2 until all categories are specified, and then associate products to the appropriate subcategory level.

Associating Products to Categories

After establishing your multiple-category hierarchy, you associate products to each of the appropriate categories. You should only associate products at the lowest level of the category hierarchy. While adding products to the upper levels of the category hierarchy is possible, it is not a recommended activity and is not enforced during SVP Actions.

To associate products with categories

1 From the application-level menu, choose View > Site Map > Catalog Administration > All Categories.

2 In the Categories list, select a category.

3 Drill down on the Category Name hyperlink until you reach the lowest level sub-category.

The Product Catalog Category Detail Administration view appears.

4 In the Products list, add a new record.

5 In the Add Internal Products dialog box, choose a product or products and click Add.

6 In the Products list, select the product or products for which you want to designate an SVP parent category.

7 Click SVP Adopt.

The SVP Adoptee field of the selected product is automatically populated with a check mark. This product now has the selected parent category as its SVP parent. The other products in the Products list, for which the SVP Adoptee field is unchecked, are not active products for the parent category. They will not appear in sales volume planning that concerns the parent category.

Adjusting Category, Subcategory and Product Hierarchies for Sales Volume Planning

An SVP Parent Category can have multiple subcategories. Each of the lowest level subcategories can have one or many related products. For the purposes of sales volume planning, a product must have a single designated SVP parent category.

To adjust category, subcategory and product hierarchies for sales volume planning

1 From the application-level menu, choose View > Site Map > Catalog Administration > All Categories.

2 In the Categories list, select the root category of the hierarchy you want to adjust.

3 Drill down on the Category Name hyperlink.

The Product Catalog Category Detail Administration view appears.

4 In the Sub-Categories list, select the subcategory or subcategories for which you will designate the parent category as its SVP parent.

NOTE: It is possible for many subcategories to be designated SVP adoptees for the SVP parent. However, if a subcategory already has another category as its SVP parent, this designation will end the previous SVP parent relationship and create a new one.

Setting Up Account-Category Hierarchies

To perform sales volume planning, you must establish an explicit and contiguous account hierarchy where every account in the hierarchy has a parent account, except the root account. The root account is the highest level account in an account hierarchy. Organizational entities that are part of sales volume plans must exist in this SVP account hierarchy.

Account-category definitions must be defined and visible. For account-categories to be visible, they must exist in the category-account list. The account-category hierarchy links are automatically created when you execute the sales volume planning action, Build Tree. You can also manually specify, modify, or delete account-category associations.

Creating an Account-Category Hierarchy

Account-category hierarchies are created by associating categories with accounts.

To create an account-category hierarchy

1 From the application-level menu, choose View > Site Map > Catalog Administration > All Categories.

2 In the Categories list, select a root category.

3 Drill down on the Category Name hyperlink.

4 From the Show drop-down list, select SVP Category Accounts.

5 In the Accounts list, add a new record.

6 In the Add Accounts dialog box, select the accounts you want to add to the category, and then click Add.

Creating an Account Subcategory Hierarchy

Account subcategory hierarchies are created by associating subcategories with accounts.

To create an account subcategory hierarchy

1 From the application-level menu, choose View > Site Map > Catalog Administration > All Categories.

2 In the Categories list, select a subcategory of the previously defined category.

3 Drill down on the Category Name hyperlink for the subcategory.

   The Product Catalog Category Detail Administration view appears, and the selected subcategory appears in the Category Form.

4 From the Show drop-down list, select SVP Category Accounts.

5 In the Accounts list, add a new record.

6 In the Add Accounts dialog box, select the accounts you want to add to the subcategory, and then click Add.

Modifying Account-Category Hierarchies

You can modify account-category hierarchies to reflect changes to accounts and categories within your organization. An account-category hierarchy is modified whenever a parent-child account relationship is changed. Changes to a parent-child account relationship can be performed by designating a new or different parent account for a given account record. This change is enforced when the Sales Volume Planning Build Tree action is performed. An administrator can make these changes from one of the following Sales Volume Planning views or through the general Data Administration views for Accounts.

To modify an account-category hierarchy

1 From the application-level menu, choose View > Site Map > Catalog Administration > SVP Category Accounts.

2 In the Category form, select a category.

3 In the Accounts list, select an account and modify the Parent Account field.

NOTE: When changing an account hierarchy structure for use with Sales Volume Planning, administrators must perform the Build Tree action. Special consideration must be taken if the hierarchy change affects a parent account in such a way that it no longer has an associated sub-account. In such a case, please contact Siebel Technical Support.

Deleting Account-Category Hiearchies

You can delete an account-category association by removing the account from the Account Category View. After making this change the build tree process must be performed. For information on the build tree process, see .

To delete an account-category hierarchy

1 From the application-level menu, choose View > Site Map > Catalog Administration > Category Accounts.

2 In the Category form, select a category.

3 In the Accounts list, select an account and delete the record.

Accessing the Sales Volume Planning Business Service

You can access the Sales Volume Planning business service to modify the business service. For example, you may want to have the business service send an email to alert the system administrator when the workflow process is complete. This would eliminate the need for the system administrator to monitor the system throughout the entire process. However, you should *not* attempt to modify the Sales Volume Planning workflow process.

To access the Sales Volume Planning business service

1 From the application-level menu, choose View > Site Map > Business Process Administration > Workflow Processes.

2 In the Workflow Processes list, click Query.

3 In the Name field, type CG SVP Process.

4 Click Go.

5 In the Name field, drill down on the CG SVP Process hyperlink.

   The Workflow Process Designer view appears. You can use the graphical flowchart tool in this view to modify the business service.

For more information on using Siebel Workflow Manager, see *Siebel Business Process Designer Administration Guide*.

Establishing a Baseline Basis Quantity

Typically, your first step in creating a baseline is generating a baseline basis quantity. A *baseline basis quantity* is generated from imported sales volume planning source data and represents the preadjusted amount of volume that would have been sold in the absence of promotional events. You can use shipments or consumption data from an earlier period or baseline data from a demand planning tool as the source for generating a baseline basis. After determining the source of the baseline basis, for example, historical shipment, you copy these records to the baseline basis quantity.

Administrator Procedures for Sales Volume Planning

To generate a baseline basis quantity

1 From the application-level menu, choose View > Site Map > Sales Volume Planning Administration.

2 In the Action form, add a new record.

3 Fill in the fields in the order given:

- Name

- Account

- Category

- Source Field

- Source Start Period

- Source End Period

- Target Field

- Target Start Period

- Target End Period

Some of the fields in the Action form are described in the following table.

Field	Comments
Account	The highest level account structure—for example, All Accounts or Company HQ.
Algorithm	Optional. The desired algorithm—for example, Percentage Change or Trended Volume-Period. LOV Type: SVP_ACTION_ALGORITHM
Category	The root category in the category-product hierarchy. Fill in either the Category field or the Product field. You must fill in the Account field *before* filling in either the Category field or Product field.
Include Skipped	Optional. Check this field to include skipped account-product periods.

Field	Comments
Name	The name of the sales volume plan, for example, Fall Baseline Basis Quantity.
%Change	Optional. The desired percentage change from the source field to the target field. You must select Percentage Change in the Algorithm field to perform this action.
Period Mapping	Optional. Check this field to map source field periods to their corresponding target field periods.
Product	The product in the category-product hierarchy.
Source End Period	The ending period of the source field.
Source Field	The source field of the baseline basis—for example, Shipped Quantity or Consumed Quantity. LOV Type: SVP Source
Source Start Period	The starting period of the source field.
Target End Period	The ending period of the target field.
Target Field	The target field of the baseline basis—for example, Baseline Basis Quantity or Baseline Basis Currency. LOV Type: SVP Source
Target Start Period	The starting period of the target field.

4 From the Action drop-down list, select Copy Field.

5 Click Execute Action.

The status of Pending appears in the Status field. After the fields are copied, the Status field changes to Complete and a dialog box appears, confirming that the action was successful. The Basis Quantity field in the Category Baseline list of the Account Baseline explorer view is now populated.

Precalculating an Adjusted Baseline Basis Quantity

After a baseline basis quantity has been established, the planning administrator can adjust this quantity to reflect growth or decline rates by using a percentage change algorithm or trended volume by period.

Using the Calculate Source button

The planning administrator can precalculate changes to the adjusted baseline basis quantity by using the Calculate Source button. The Calculate Source button determines the quantity values for this data and provides an administrator with a quick reference of the total quantity. If an administrator believes that quantity values have been skipped and wants to understand the source value (pre-calculation) for all periods including skipped periods, the administrator would select the same periods before using the Calculate Source button.

After making all of the desired adjustments to the baseline basis quantity, the planning administrator copies the values to the baseline basis planning quantity.

To precalculate an adjusted baseline basis quantity

1 From the application-level menu, choose View > Site Map > Sales Volume Planning Administration.

2 In the Action form, add a new record.

3 Fill in the fields in the order given:

- Name
- Account
- Product
- Source Field
- Source Start Period
- Source End Period
- Optional: Include Skipped
- Optional: Algorithm
- Optional: Percent Change

Some fields in the Action form are described in the following table.

Field	Comments
Account	The account in the account-product hierarchy that will be used to calculate the adjusted baseline basis.
Algorithm	The desired algorithm — for example, Percentage Change or Trended Volume-Period.
	LOV Type: SVP_ACTION_ALGORITHM
Category	The category in the category-product hierarchy that will be used to calculate the adjusted baseline basis. Fill in either the Category field or the Product field. You must fill in the Account field *before* filling in either the Category field or Product field.
Include Skipped	Optional. Check this field to include skipped account-product periods.
Name	The name of the sales volume plan.
%Change	The desired percentage change to be calculated from the source field. You must select Percentage Change in the Algorithm field to perform this action.
Product	The product in the category-product hierarchy that will be used to calculate the baseline basis. Fill in either the Category field or the Product field.
Source End Period	The ending period of the source field.
Source Field	The source field of the baseline planning — for example, the baseline basis.
	LOV Type: SVP Source
Source Start Period	The starting period of the source field.

4 Click Calculate Source.

The Source Value field displays the unadjusted Source field quantity and the Target Value field displays the adjusted Source field quantity.

You can also enter a quantity value in the Override field. The value in the Override field is displayed in the Target Value field, while the %Change field is adjusted to reflect the value in the Override field.

NOTE: The Override field is not dependent on selection of algorithm, algorithm period, or algorithm percentage change.

Copying Baseline Basis Quantity to Baseline Planning Quantity

After adjusting the baseline basis quantity, you can copy the baseline basis quantity to the baseline planning quantity. End users, such as regional sales managers, use the baseline planning quantity as their planning quantity and adjust it to reflect their market expectations for the sales volume planning period.

To copy the Baseline Basis Quantity to the Baseline Planning Quantity

1 From the application-level menu, choose View > Site Map > Sales Volume Planning Administration.

2 In the Action form, add a new record.

3 Fill in the fields in the order given:

- Name

- Account

- Category

- Source Field

- Source Start Period

- Source End Period

- Target Field

- Target Start Period

- Target End Period

Some of the fields in the Action form are described in the following table.

Field	Comments
Account	The account in the account-product hierarchy that will be used when you are copying from the Baseline Basis field to the Baseline Planning field.
Algorithm	Optional. The desired algorithm (for example, Percentage Change). LOV Type: SVP_ACTION_ALGORITHM
Category	The category in the category-product hierarchy that will be used when you are copying from the Baseline Basis field to the Baseline Planning field. Fill in either the Category field or the Product field.
Include Skipped	Optional. Check this field to include skipped account-product periods.
Name	The name of the sales volume plan.
%Change	Optional. The desired percentage change from the Baseline Basis field to the Baseline Planning field. You must select Percentage Change in the Algorithm field to perform this action.
Product	The product in the category-product hierarchy that will be used when you are copying from the Baseline Basis field to the Baseline Planning field. Fill in either the Category field or the Product field.
Source End Period	The ending period of the source field.
Source Field	The source field that will be copied from — for example, Baseline Basis Quantity. LOV Type: SVP Source
Source Start Period	The starting period of the source field.
Target End Period	The ending period of the target field.

Field	Comments
Target Field	The target field that will be copied to — for example, Baseline Planning Quantity.
	LOV Type: SVP Source
Target Start Period	The starting period of the target field.

4 From the Action drop-down list, select Copy Field.

5 Click Execute Action.

The status of Pending appears in the Status field. After the fields are copied, the Status field changes to Complete and a dialog box appears, confirming that the action was successful. The Baseline Planning Quantity field in the Category Baseline list of the Account Baseline Explorer view is now populated with your adjustments.

Copying Baseline Planning Quantity to Baseline Quantity

A *baseline quantity* is the number of products that would have been sold in the absence of promotional events. After establishing a baseline quantity, key account managers can use this value in conjunction with the Siebel Trade Promotions module to better plan incremental promotional volume at an account. Baseline quantity can also be used to establish and generate volume targets.

To copy the Baseline Planning Quantity to the Baseline Quantity

1 From the application-level menu, choose View > Site Map > Sales Volume Planning Administration.

2 In the Action form, add a new record.

3 Fill in the fields in the order given:

- Name

- Account

- Category

- Source Field

- Source Start Period

- Source End Period

- Target Field

- Target Start Period

- Target End Period

Some of the fields in the Action form are described in the following table.

Field	Comments
Account	The account in the account-product hierarchy that will be copied.
Algorithm	Optional. The desired algorithm (for example, Percentage Change). LOV Type: SVP_ACTION_ALGORITHM
Category	The category in the category-product hierarchy that will be copied. Fill in either the Category field or the Product field.
Include Skipped	Optional. Check this field to include skipped account-product periods.
Name	The name of the sales volume plan.
% Change	Optional. The desired percentage change from the Baseline Basis field to the Baseline Planning field. You must select Percentage Change in the Algorithm field to perform this action.
Product	The product in the category-product hierarchy that will be copied. Fill in either the Category field or the Product field.
Source End Period	The ending period of the source field.
Source Field	The source field that be will copied from — for example, Baseline Planning Quantity. LOV Type: SVP Source
Source Start Period	The starting period of the source field.

Field	Comments
Target End Period	The ending period of the target field.
Target Field	The target field that will be copied to — for example, Baseline Quantity. LOV Type: SVP Source
Target Start Period	The starting period of the target field.

4 From the Action drop-down list, select Copy Field.

5 Click Execute Action.

The status of Pending appears in the Status field. After the fields are copied, the Status field changes to Complete and a dialog box appears, confirming that the action was successful. The Baseline Quantity field in the Category Baseline list of the Account Baseline explorer view is now populated.

Building Account-Product Trees

The Sales Volume Planning Build Tree action executes and builds the account-category relationships defined earlier in the physical database. After this process is complete, Sales Volume Planning users can navigate the associated account-category hierarchy to understand or change periodic product movement data.

Products must be associated with their respective account's authorized product distribution list. For more information, see Chapter 5, "Product Distribution."

NOTE: It is recommended that you run the Build Tree process only once a week or any time there is a change to either the Account or Product hierarchy definitions, or if aggregation of data is necessary.

To build an account-product tree

1 From the application-level menu, choose View > Site Map > Sales Volume Planning Administration.

2 In the Action form, add a new record.

3 Fill in the fields of the Action form that are described in the following table.

Field	Comments
Name	The name of the sales volume plan.
Source Field	The source of the account-product tree — for example, Shipped Quantity or Consumed Quantity. The Source Field may also include Target or Baseline data from an earlier period or imported data.
	LOV Type: SVP Source
Source Start Period	The starting period of the source field.
Source End Period	The ending period of the source field.

4 From the Action drop-down list, select Build Tree.

5 Click Execute Action.

Pending appears in the Status field. After the account-product tree is built, the Status field changes to Complete and a dialog box appears, confirming that the action was successful.

NOTE: Running Build Tree for the first time will create a large amount of transaction records. It is recommended that you perform this function in an environment that will allow optimum performance. To improve the performance, switch off transaction logging during Build Tree and reextract all mobile clients afterwards. See the *Siebel Remote and Replication Manager Administration Guide* for details. Make sure that the Siebel database is configured according to the recommendations in the *Siebel Server Installation Guide* for the operating system you are using.

Copying an Account-Product Tree

After establishing an account-product tree, you can copy the entire tree within a single product movement table, such as Baseline. You need to perform this procedure when you want to carry forward all values within a single movement type from one account-product period to another, (for instance, from WK01 to WK02 or from WK01-WK52 2000 to WK01-WK52 2001). You can also perform this procedure if the data for a future period is identical or based on data from a prior period.

To copy an account-product tree

1 From the application-level menu, choose View > Site Map > Sales Volume Planning Administration.

2 In the Action form, add a new record.

3 Fill in the fields in the order given.

Some of the fields in the Action form are described in the following table.

Field	Comments
Account	The account in the account-product hierarchy that will be copied.
Category	The category in the product-category hierarchy that will be copied. Fill in either the Category field or the Product field.
Name	The name of the sales volume plan (for example, Fall Build Tree Process).
Product	The product in the product-category hierarchy that will be copied. Fill in either the Category field or the Product field.
Source End Period	The ending period of the source field.
Source Field	The source field that will be copied from. LOV Type: SVP Source
Source Start Period	The starting period of the source field.
Target End Period	The ending period of the target field.
Target Field	The target field that will be copied to. LOV Type: SVP Source
Target Start Period	The starting period of the target field.

4 From the Action drop-down list, select Copy Tree.

5 Click Execute Action.

The status of Pending appears in the Status field. The complete source tree is copied within a single product movement table, such as Baseline. After the account-product tree is copied, the Status field changes to Complete and a dialog box appears, confirming that the action was successful.

Populating Account-Product Tree Locks

After building an account-product tree, you populate the locks of the tree. Locks are populated at the account level; this prevents users at lower account levels from overwriting modifications made by higher account level users.

NOTE: Executing the Build Tree process automatically unlocks any locked nodes. Sales volume planning administrators do not need to manually perform this task.

To populate account-product tree locks

1 From the application-level menu, choose View > Site Map > Sales Volume Planning Administration.

2 In the Action form, add a new record.

3 Fill in the Name field. For example, Fall Forecast - Populate Locks.

4 From the Action drop-down list, select Populate Locks.

5 Click Execute Action.

Pending appears in the Status field. After the locks in the account-product hierarchy are populated, the Status field changes to Complete and a dialog box appears, confirming that the action was successful.

Manually Entering Sales Volume Planning Data

Marketing administrators who want to prepare sample databases for training or testing purposes can manually enter account product or account-category volume data for use in the sales volume planning process. Manually entering this data eliminates the need to import these records.

NOTE: Use caution when entering this data manually. It is preferable to establish and use a separate sample SVP hierarchy for training purposes. For more information, contact Siebel Technical Support.

To manually enter account-product data

1 From the application-level menu, choose View > Site Map > Data Administration > Account Product.

2 Enter the desired account-product data.

To manually enter account-category-product data

1 From the application-level menu, choose View > Site Map > Data Administration > Account Category.

2 Enter the desired account-category data.

NOTE: Products must be associated with their respective account's authorized product distribution list. For more information, see Chapter 5, "Product Distribution."

Maintaining an Account-Product Tree

You can maintain the account-product tree by resetting the levels and locks of the tree.

Resetting Account-Product Tree Levels

During the sales volume planning period, you can reset the levels of an account-product tree. Perform this task if new accounts have been added or the category-product hierarchy has changed. Resetting account-product tree levels resets the account level and category level designations to reflect the updated hierarchical change.

To reset account-product tree levels

1 From the application-level menu, choose View > Site Map > Sales Volume Planning Administration.

2 In the Action form, add a new record.

3 Fill in the Name field.

4 From the Action drop-down list, select Reset Levels.

5 Click Execute Action.

The status of Pending appears in the Status field. After the levels in the account-product hierarchy are reset, the Status field changes to Complete and a dialog box appears, confirming that the action was successful.

Resetting Account-Product Tree Locks

You can reset the locks of an account-product tree to allow users at lower account levels to modify sales volume planning data. You can also reset account-product tree locks if an account team lock is preventing a user from modifying that user's data and the lock cannot be resolved by the members of the account team. For example, the members of the account team may be out of the office, on vacation, or a lock error may have occurred. Resetting account-product tree locks will override the lock that was established and allow other users to modify the previously locked records.

NOTE: Executing the Build Tree process automatically unlocks any locked nodes. Sales volume planning administrators do not need to manually perform this task.

To reset account-product tree locks

1 From the application-level menu, choose View > Site Map > Sales Volume Planning Administration.

2 In the Action form, add a new record.

3 Fill in the Name field. For example, Reset Account Product Locks - Fall Season.

4 From the Action drop-down list, select Reset Locks.

5 Click Execute Action.

The status of Pending appears in the Status field. After the locks in the account-product hierarchy are reset, the Status field changes to Complete and a dialog box appears, confirming that the action was successful.

End User Procedures for Sales Volume Planning

This section provides instructions for the following procedures:

Viewing Sales Volume Planning Data

Throughout the sales volume planning period, regional sales managers view sales volume planning data to monitor shipment or consumption amounts, gather feedback on the effectiveness of promotions, and track their progress in meeting their targets.

Viewing Shipments

Shipments are the amount of product shipped to accounts during a period of time. Many organizations use shipments to derive their target quantities. Because shipments are always historical data, you and your end users can view, but not modify, the shipment data.

To view shipments

1 Navigate to the Sales Volume Planning screen.

2 From the Show drop-down list, select Shipments, then select an account.

3 In the Category-Products explorer tree, select a product.

4 Optional. From the drop-down list, select Period Analysis.

Shipments by period appear in a graphical chart.

End User Procedures for Sales Volume Planning

Viewing Consumption

Consumption is the amount of product purchased by customers during a period of time. Many organizations use consumption to derive baseline quantities. Because consumption is always historical data, you and your end users can view—but not modify—the consumption data.

To view consumption

1 Navigate to the Sales Volume Planning screen.

2 From the Show drop-down list, select Consumption, then select an account.

3 In the Category-Products explorer tree, select a product.

4 Optional. From the drop-down list, select Period Analysis.

Consumption by period appears in a graphical chart.

Viewing Baselines

Baseline data is the amount of product that would have been shipped, sold, or consumed in the absence of a promotion for a given period of time.

To view baselines

1 Navigate to the Sales Volume Planning screen.

2 From the Show drop-down list, select Baseline, then select an account.

3 In the Category-Products explorer tree, select a product.

4 Optional. From the drop-down list, select Period Analysis.

Baseline by period appears in a graphical chart.

Viewing Incremental Quantity

Incremental quantity is the amount of product that was shipped, sold, or consumed as a direct result of a promotion for a given period of time. For example, a product may be on sale for 50 percent off, and as a result a customer purchases two incremental pallets of the product in addition to the one the customer regularly purchases.

NOTE: Incremental quantity is generated during promotion planning. For more information, see Chapter 7, "Trade Promotions."

To view incremental quantity

1 Navigate to the Sales Volume Planning screen.

2 From the Show drop-down list, select Baseline, then select an account.

3 In the Category-Products explorer tree, select a product.

4 In the Baseline list, execute a query for the period you want to analyze.

Incremental quantity from promotions executed during the selected period appears.

End User Procedures for Sales Volume Planning

Viewing Targets

Targets are the amount of product a manufacturer expects its sales force to sell in a given period of time. This product data can be derived from historical shipment, baseline, or consumption information. Targets can incorporate growth or decline rates for the sales volume planning period.

To view targets

1 Navigate to the Sales Volume Planning screen.

2 From the Show drop-down list, select Target, then select an account.

3 In the Category-Products explorer tree, select a product.

4 Optional. From the drop-down list, select Period Analysis.

Targets by period appear in a graphical chart.

Adjusting Sales Volume Planning Source Data

After importing the sales volume planning source data, your managers can make adjustments to reflect changes in the account product hierarchy. For example, an account may no longer be part of your organization, a product may have been discontinued, or a period may not apply to sales volume planning. These adjustments are made by excluding or skipping some of the source data.

NOTE: The following example uses shipment data as the source for the sales volume planning process. Your company may use a different source, such as consumption data, depending upon its business practices.

To exclude or skip source data

1 Navigate to the Sales Volume Planning screen.

2 Click the Shipment view tab, then select an account.

3 In the Category-Products explorer tree, select the product for which you want to view shipments.

In the Shipment list, the quantity of shipped cases for the selected account-product pair appears.

4 Optional: In the Shipments list, perform a query for a specific period that you want to exclude or skip in the sales volume planning process.

5 In the Shipments list, select the period you want to mark as skipped, and then click the Skip check box.

6 Optional: Click Skip All to skip all periods.

Locking and Modifying the Planning Quantity

The Sales Volume Planning module offers two options for locking an account-product node. The first option is based on the position of the person locking the account-product node. Any user in the account hierarchy can lock a node to prevent users at lower positions in the account hierarchy from modifying their account-product nodes. The second option for locking an account-product node is to manually set a lock by using the Lock and Unlock buttons.

Locking an Account-Product Node Based on Position

As a sales volume planning administrator, you establish the baseline planning quantity. You then release the baseline planning quantity to senior managers, who make adjustments to it based on their market expectations. While the senior managers are modifying the baseline planning quantity, you place a lock on the account-product node being modified. This lock prevents other users from overwriting modifications made by the senior managers. After each adjustment, the managers allocate the baseline planning quantity through the organizational hierarchy.

Once a field is modified, the account-product node being modified is locked so that only the account team can make modifications. Locking a higher-level account-product node also disables the ability to lock lower-level account-product nodes. This prevents users making modifications at lower account-product nodes from having their changes unknowingly overwritten by higher-level users. When users press the Allocate button, the changes are allocated to lower levels and the account-product node is automatically unlocked.

You can see which nodes have been locked by navigating to the Allocate Lock column in the hierarchical list of accounts.

Manually Locking an Account-Product Node

Another method of locking an account-product node is by using the Lock and Unlock buttons. Using the Unlock button unlocks the account-product node only if no changes have been made. If changes have been made, the node remains locked until the changes are allocated or until the Build Tree action is performed and the specific updates are aggregated up the organizational hierarchy.

NOTE: Locking an account-product node is a recommended activity wherever it is mentioned in this chapter. Locking provides a mechanism that allows users to modify data throughout the account-product-category hierarchy without conflicting with other users' modifications.

To modify the baseline planning quantity

1 Navigate to the Sales Volume Planning screen.

2 From the Show drop-down list, select Baseline, then select an account.

3 In the Category-Products explorer tree, select the category or product for which you want to modify the baseline planning quantity.

4 In the Baseline Planning Quantity field, select a record you want to modify and then edit the fields.

NOTE: To apply the same change to multiple periods, click Mass Change, complete the fields in the Baseline Mass Change dialog box and then click Execute.

Adjustments made to the baseline planning quantity affect only the products and categories within the account.

You then have the following options:

■ **Navigate to a category sublevel.** From the drop-down list, select one of the following:

❏ Sub-Account Category

❏ Sub-Category Baseline

❏ Sub-Product Baseline

■ **Navigate to a product sublevel.**

❑ In the Category-Products explorer tree, select a product.

❑ In the Product Baseline list, from the Show drop-down list, select the Sub-Account Product sublevel.

■ **Click Lock.**

The selected account-product node is locked. Other nonaccount team users attempting to modify the selected account-product node will get an error message that the selected account-product node is locked.

NOTE: Modifying baseline data automatically locks the account-product node.

■ **Click Refresh.**

This is for informational purposes only. The Basis% field is recalculated to reflect the new proportions of the account-product hierarchy. Repeat Step 4 until you finish modifying the basis planning quantity.

5 Click Allocate.

The baseline planning quantity is allocated to the next lower level of the account hierarchy and the account-product node is unlocked. Managers at the next lower level of the account hierarchy repeat this process until the baseline planning quantity is allocated to the lowest level of the account hierarchy.

NOTE: An account can only be unlocked if there are no subpending action records associated with it.

Sales Volume Planning FAQs

The following are some of the most frequently asked questions (FAQs) about working with the Sales Volume Planning Module:

1 What are the definitions of the algorithms available in the Sales Volume Planning module?

There are two algorithms available in the Sales Volume Planning module:

■ **Percentage change.** Refers to the type of algorithm to be used during the specified SVP action. That is, it modifies the source value by a percentage as it populates the target proportionately. Period definition is not required when using %Change.

■ **Trended Volume Period.** Compares Trend Volume Period with Source Period and extrapolates by percentage from Source to Target. Algorithm period definition is a required field. The following table shows settings for Source, Algorithm, Target Start, and Target End Periods.

Source	Algorithm (Trended Volume)	Variance	Target
Start = Wk 1, 1998 (Qty 100)	Start = Wk 1, 1999 (Qty 110)	10% (+11)	Start = Wk 1, 2000 (Qty 121)
End = Wk 2, 1998 (Qty 100)	End = Wk2, 1999 (Qty 90)	10% (-11)	End = Wk 2, 2000 (Qty 81)

2 What is the sales volume planning Build Tree action "process"?

Sales volume planning is the process of modeling projected sales of a product at one or more accounts within an upcoming period of time. Companies establish sales volume plans to forecast or plan the quantity of products they will sell to these accounts during the sales volume planning period. The sales volume planning Build Tree process models this complex account-category-product-period hierarchy and allows for the allocation and aggregation of data through this hierarchy.

The sales volume planning Build Tree action uses the account-category links created by an administrator to construct the account-category-product hierarchy, and associates the imported source data with the appropriate sales volume planning nodes. Sales volume planning nodes create records that represent the combination of accounts and category-products.

The sales volume planning Build Tree action is an ongoing sales volume planning task. Each time the action is run after the initial Build Tree action, a search is performed down the established account-category-product-period hierarchy structure and any new or missing nodes are created.

The data is then reaggregated through the account-category-product-period hierarchy. The Build Tree action should be performed any time a planning cycle is complete for a particular column (for example, baseline planning), and the values need to be aggregated.

The build tree process is specific to a single SVP entity (Baseline, Shipment, Target, or Consumption). For example, a user who triggers the Build Tree process for Baseline may select the Baseline Planning Qty field as the Source Field for the Build Tree Action. This Build Tree process will aggregate all Baseline Basis, Baseline Planning, and Baseline values, as well as the Incremental values, because those fields are all relevant to the Baseline SVP entity. Shipped Qty will not be effected, because it is relevant to the Shipment SVP entity. A separate Action would be required to perform Build Tree for Shipment data.

The execution of the sales volume planning Build Tree action is a process intensive task, as it is dependent upon the complexities of your account-category-product-period hierarchy, as well as your source data set. The appropriate planning of this process is a key component to using the Siebel Sales Volume Planning module.

3 Does the sales volume planning Build Tree action create a tree for both targets and baselines?

The sales volume planning Build Tree action must be run independently for each product movement type: baseline, target, consumption, and shipment. For example, a planning administrator who wants to establish targets and a baseline basis must run the Build Tree action twice, once to establish the targets and a second time to establish a baseline basis. The planning administrator uses the same sales volume planning hierarchy when performing the Build Tree action for targets and a baseline basis.

4 Does the sales volume planning Copy Tree action work across tables?

Unlike the Sales Volume Planning Copy Field action, Copy Tree cannot be performed across tables, due to the inherent differences in table column definitions.

5 What does the Account Allocation Level parameter refer to and how do you view an account's level?

The Account Allocation Level parameter is used to specify the account level in the sales volume planning account hierarchy that will be used when performing a sales volume planning action. For example, if you want to allocate two levels, you would navigate to the Sales Volume Planning Administration screen and in the Action form, click the Allocation Level drop-down arrow and choose Allocation Level 2.

The parent account is always designated as Level 1 and each subaccount level is designated as the next sequential number. These allocation levels are specific to the sales volume planning account hierarchy.

To view an account's level, you execute the sales volume planning action Reset Levels, which displays the current levels associated with each account represented in your sales volume planning hierarchy. For more information on resetting levels in sales volume planning, see .

6 How is the percentage basis calculated in each sales volume planning-specific Category list (for example, Category Baseline or Category Target)?

The percentage basis is calculated as the proportion of the record to the total value of records in the referenced list.

7 After a sales volume planning administrator releases the basis planning quantities (baseline or target) and the subordinate managers finish modifying their basis planning quantities, to what level does the Allocate button release the updated basis planning quantities?

The Allocate button releases the updated basis planning quantities to the next lower level of the account hierarchy and unlocks the account-category-product node. Managers at the next lower level of the account hierarchy repeat this process until all of the quantities are allocated to the lowest level of the account hierarchy.

In addition, after performing Build Tree, administrators perform Populate Locks and the data becomes visible to subordinate managers.

8 Can data be imported into the baseline and target account-category-product hierarchy?

You can use Siebel Enterprise Integration Manager (EIM) to import data into any of the standard product movement tables (baseline, target, consumption, and shipment) provided for the use of the sales volume planning process. Data imported into these tables is copied or staged to the appropriate catalog category tables for the same product movement types. For more information on using EIM, see *Siebel Enterprise Integration Manager Administration Guide*.

9 Can Sales Volume Planning actions be performed across period types?

The sales volume planning Build Tree action does not aggregate across period types, so data changes made to data stored in weeks will not aggregate up into the monthly periods, nor will changes made at the annual level allocate down throughout the periods that make up the year.

It is recommended that data be stored in the standard periods of either weeks or months.

10 Will extensions be recognized by SVP Actions?

No, extensions are not recognized by SVP Actions.

11 What locking mechanism or process is used by the Sales Volume Planning module during the allocation and aggregation process?

The Sales Volume Planning module uses an allocation lock process during the allocation and aggregation process. An allocation lock is a Boolean variable kept at the highest account level. When set, all subordinate account levels are prevented from performing updates to Sales Volume Planning data. Before an allocation lock is granted, the current account node must be checked to confirm that its upper lock is active, and a search is performed to ascertain that no allocation lock is currently held in the superior account node.

Allocation locks are maintained for the account hierarchy. Within a single instance of the category-product hierarchy, all updates will be allocated and aggregated immediately.

After a user has completed the sales volume planning allocation-related updates, the actual allocation will be invoked, at which time the Siebel application will modify the locks as follows:

- By updating the upper lock in the originating allocation node
- By disallowing further changes there until build tree action is performed

Information for Configurators of Sales Volume Planning

This section offers guidelines to follow when configuring this module.

The procedures documented in this chapter include buttons that invoke specialized methods, as described in Table 16.

Table 16.   Buttons and Methods for Sales Volume Planning Configuration

Button	Name of Method	Description	Supported On
Allocate	MthdAlloc	Changes status of allocate action to pending, ready to be picked up by Workflow Monitor.	Bus Comp Layer
Calculate Source	OnCalculate	Sums up total value of source field specified between start and end field.	Bus Comp Layer
Execute	MassChange	Finds all (Baseline/Target) records with period between Period Start and Period End, updates the Field specified with Value according to the Algorithm Type. For 'Percentage Change,' the new value will be (1 + Value/100)*oldvalue; for 'Flat Change,' the new value = Value	Applet Layer
Execute Action	On Execute	Changes status of actions from initialized to pending, ready to be picked up by Workflow Monitor.	Bus Comp Layer
Lock	mthdLock	Locks a node and makes it modifiable.	Bus Comp Layer
Mass Change	ShowPopup	Opens a popup dialog box that displays the following options: ■ Algorithm type ■ Field ■ Value ■ Period Start ■ Period End The dialog box also contains the Execute button.	Applet Layer

Information for Configurators of Sales Volume Planning

Table 16.   Buttons and Methods for Sales Volume Planning Configuration

Button	Name of Method	Description	Supported On
Refresh	OnRefresh	Refreshes the form and recalculates planning percentages.	Bus Comp Layer
Skip All	SetAll	Sets skip flag to True.	Bus Comp Layer
SVP Adopt	mthdAdoptSVPParent	Adopts categories in a hierarchy and makes them a part of the SVP category hierarchy.	Bus Comp Layer
Unlock	mthdUnlock	Unlocks a node and makes it non-modifiable.	Bus Comp Layer

Trade Promotions 7

This chapter describes how to create promotions at both corporate and account levels and how to simulate the outcome of a trade promotion.

About Promotions

There are three kinds of promotions: corporate promotions, discretionary promotions, and account promotions. *Corporate promotions* are company-wide promotions of a product or a brand in which accounts can participate. They are run for a specific time period and contain the objective of the promotion, suggested tactics, and other information. For example, a beverage company decides to promote a new product by running a corporate promotion with the recommended tactics of a temporary price reduction (TPR) and in-store displays.

Discretionary promotions are promotion templates that can serve as the basis of an account promotion. After a discretionary promotion has been created, it is saved as a template. Other key account managers can use templates of existing promotions when establishing promotions at their accounts.

Account promotions can be based on a corporate promotion or a discretionary promotion. A *plan* is a group of account promotions that depicts the aggregate results of account promotions, such as spending and volume.

Business Scenario for Trade Promotions

This scenario is an example of a workflow performed by brand managers and key account managers. Your company may follow a different workflow according to its business requirements.

A large beverage manufacturer has just developed a new brand of fruit-flavored beverage. The brand manager for the new brand has decided that a corporate promotion to promote the new brand will be launched for the year 2003. The corporate promotion recommends a temporary price reduction (TPR) and a themed in-store display as tactics during Week 10, 2003.

The key account manager for a large chain of grocery stores is responsible for creating account promotions to generate incremental volume and brand awareness. She reviews the corporate promotion and uses the promotion simulation feature to evaluate how the corporate promotion will perform at her account. After deciding to run the corporate promotion at her account, she adds the corporate promotion to the account plan. Then, she selects the products that will be included in the promotion and designates them *promoted products*. For each promoted product, she creates a deal to indicate how much the grocery chain will be paid and the source of funding.

When the key account manager completes the above steps, she submits the account plan to her manager for approval. Her manager has several options in evaluating the plan, ranging from rejecting to approving the plan, pending review and acceptance by the customer.

Once the plan is approved internally, the key account manager seeks acceptance from the account.

NOTE: This business scenario describes one method for creating promotions in which plans are used. Promotions can also be created without the use of plans. This business scenario describes promotion management of a brand and associated products. Promotions can also be managed at the product (SKU) level alone.

Administrator Procedures

This example workflow is performed by brand managers and key account managers. Your company may follow a different workflow according to its business requirements

When working with promotions, brand managers or other personnel with administrative privileges complete the following procedures:

1 **Create corporate promotions.** You can create and maintain corporate promotions, which are not account-specific. For information, see "Creating Corporate Promotions" on page 159.

2 **Add products to corporate promotions.** After creating a corporate promotion, you add products to the promotion. For information, see "Adding Products to Corporate Promotions" on page 161.

3 **Attach literature to corporate promotions.** You can attach literature, such as product information sheets, to corporate promotions. For information, see "Attaching Literature to Corporate Promotions" on page 162.

4 **Create and modify promotion profiles.** You can create and modify promotion profiles that end users, such as key account managers, can use when creating account promotions. For information, see "Creating Promotion Profiles" on page 162.

End-User Procedures

End users can create plans and create promotions for plans, or they can create account promotions without the use of plans.

The following workflow describes the procedures that end users, such as key account managers, need to perform to create account promotions, including the optional steps required to create plans. Your company may follow a different workflow according to its business requirements.

1 **Create an account promotion profile.** End users can enter information about the way promotions are set up at their accounts. For information, see "Creating Account Promotion Profiles" on page 165.

2 **Review current corporate promotions.** End users can review corporate promotions to consider whether their account should be a participant. For information, see "Viewing Corporate Promotions" on page 168.

3 **Conduct a promotion simulation.** End users can evaluate a new promotion by simulating the effects of a promotion if it is implemented. For information, see "Simulating Promotions for Promoted Products and Categories" on page 169.

4 **Create plans.** End users can group promotions for an account into plans. For information, see "Creating Plans" on page 174.

5 **Create account promotions for a plan.** End users can create account promotions for a plan. For information, see "Adding Products to Account Promotions" on page 178.

6 **Create deals for promotions.** End users can create deals to pay for account promotions. For information, see "Creating Deals for Promotions" on page 177.

7 **Add products to promotions.** For information, see "Adding Products to Account Promotions" on page 178.

8 **Create deals for a promoted product.** End users can create deals to pay for promoted products. For information, see "Creating a Deal for a Promoted Product" on page 179.

9 **Associate baseline and shipment data with promoted products.** For information, see "Associating Baseline and Shipment Data with Promoted Products" on page 181.

10 **Add attachments to promotions.** End users can add attachments such as proof of performance to promotions. For information, see "Adding Attachments to Promotions" on page 183.

11 **Associate objectives with account promotions.** For information, see "Associating Objectives with Promotions" on page 184.

12 **Obtain approval.** End users can submit plans or account promotions for approval. End users can also revise a plan or promotion. For information, see "Obtaining Approvals for a Plan" on page 184.

13 **Assign target account lists to a corporate promotion.** For more information, see "Committing Target Account Lists to a Corporate Promotion" on page 186.

14 **Optional: Create promotions for an account.** End users can create promotions for an account that is not part of a plan. For information, see "Creating Promotions for an Account" on page 187.

Administrator Procedures

This section provides instructions for the following procedures:

Creating Corporate Promotions

Brand managers create and maintain corporate promotions. For example, the brand manager of a new fruit-flavored beverage may wish to run a Summer Olympics promotion of the product. The brand manager creates a corporate promotion. The promotion provides information about the recommended method for running the promotion, start and end dates for the promotion, the objective for the promotion, and other details.

Key account managers review corporate promotions when creating promotions for their own accounts. Information included in corporate promotions, such as suggested tactics for promoting products, is useful to key account managers during the account promotion planning process.

Administrator Procedures

To create a corporate promotion

1 From the application-level menu, choose View > Site Map > Data Administration > Corporate Promotions.

2 In the Corporate Promotions list, add a record and complete the necessary fields.

Some fields in the Corporate Promotions list are described in Table 17.

Table 17.   Selected Fields Found in the Corporate Promotions List

Field	Comments
Category	Brand or category of the promotion.
Parent Promotion	If the promotion is a child of a parent promotion, the parent is specified here.
Period	Period of time for the promotion. By default, the Start and End dates for the promotion, shipment, and consumption fields are equal to the start and end dates of the period.
Promotion	Name of the promotion. Click the hyperlink to navigate to the Promotion Literature view for this promotion.
Promotion Id	A unique number assigned to the promotion.
Tactics	Tactic used for the promotion (for example, feature display or temporary price reduction) LOV Type: TACTICS_TYPE

NOTE: Any account promotion that is based on a corporate promotion relies on the corporate promotion for its name. Before you delete a corporate promotion, be sure to first delete any account promotions that are based on the corporate promotion being deleted.

Adding Products to Corporate Promotions

When you have created a corporate promotion, you associate products with it by putting them on the Promoted Products list.

To add products to corporate promotions

1 From the application-level menu, choose View > Site Map > Data Administration > Corporate Promotions.

2 In the Corporate Promotions list, select a promotion.

3 Click the Promoted Products view tab.

4 In the Promoted Products list, add a record.

Some of the fields in the Promoted Products list are described in Table 18.

Table 18.   Fields in the Promoted Products List

Field	Comment
SKU	Stock keeping unit number of the product
Start Date	By default, the start date of the product.
End Date	By default, the end date of the product.

Administrator Procedures

Attaching Literature to Corporate Promotions

You can associate literature with corporate promotions. Each literature record in the Literature list identifies one attached file. If you have the appropriate application installed on your computer, you can open these files by clicking the hyperlink in the Name field of the record. For example, if a Microsoft PowerPoint (.ppt) presentation file is listed and you have PowerPoint installed on your computer, you can open the file by clicking the hyperlink.

To attach literature to a corporate promotion

1 From the application-level menu, choose View > Site Map > Data Administration > Corporate Promotions.

2 In the Corporate Promotions list, select the corporate promotion to which you want to attach literature.

3 Click the Literature view tab.

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

For more information on working with literature in Siebel applications, see *Applications Administration Guide*.

Creating Promotion Profiles

Administrators can create promotion profile templates that are used to create an account promotion profile. The account promotion profile inherits the attributes of the template, including:

■ The promotion Start and End dates

■ The shipment Start and End dates

■ The consumption Start and End dates

An account can have more than one account promotion profile and one promotion profile template can be shared across accounts. Initially, no name is associated with a promotion profile template.

NOTE: After creating a promotion profile template, any changes to the template will be automatically passed on to all account promotion profiles that are based on the template promotion profile.

To create a promotion profile

1 From the application-level menu, choose View > Site Map > Data Administration > Promotion Profile.

2 In the Promotion Profile list, add a record and complete the necessary fields.

Some fields in the Promotion Profile List are described in Table 19.

Table 19.   Selected Fields in the Promotion Profile List

Field	Comments
Cons End Offset	The number of days from the start of the consumption to the end of the consumption.
Cons Start Offset	The number of days from the start of the promotion to the start of consumption.
Promo End Offset	The number of days from the start of the promotion to the end of the promotion.
Promo Start Offset Day	The day of the week on which the promotion will start. LOV Type: DAY_NAME
Ship End Offset	The number of days from the start of shipments to the end of shipments.
Ship Start Offset	The number of days from the start of the promotion to the start of shipments. This number can be negative.

End User Procedures

This section provides instructions for the following procedures:

Creating Account Promotion Profiles

Key account managers establish account promotion profiles to describe how their accounts manage promotions. The account promotion profile populates the start and end dates for promotion, shipment and consumption data fields. This information allows key account managers to more quickly set up promotions at their accounts.

The following example illustrates the advantages of using an account promotion profile.

A key account manager creates a promotion for the first week of the year 2004. Table 20 shows the default values that would appear if the manager did not use an account promotion profile (using the sample database).

Table 20.   Default Values Applied to Sample Promotion

Field	Start Date	End Date
Promotion	January 7, 2004	January 13, 2004
Shipment	January 7, 2004	January 13, 2004
Consumption	January 7, 2004	January 13, 2004

By using an account promotion profile, a key account manager can change the default start and end dates. Table 21 shows the values that would appear if the key account manager had instead created an account promotion profile for the preceding example.

Table 21.   Values Applied by Sample Account Promotion Profile

Field	Start Date	End Date
Promotion	January 7, 2004	January 13, 2004
Shipment	January 1, 2004	January 11, 2004
Consumption	January 8, 2004	January 15, 2004

When an account promotion profile has been created, the information in the profile is automatically applied to any new promotions created for the account. For example, if an account's promotion profile specifies that promotions at the account last seven days, new promotions created for the account will automatically be assigned a seven day period. These prepopulated values can be edited.

NOTE: Key account managers can create many account promotion profiles for an account, but one profile should be designated as the primary account promotion profile. There is no system check for a primary profile designation, but for the promotion to automatically use the account promotion profile, that account promotion profile must be the primary profile.

To create an account promotion profile

1 Navigate to the Accounts screen.

2 In the Accounts list, select an account.

3 Click the Promotion Profile view tab.

4 In the Promotion Profile list, do one of these:

- Click New to create a new promotion profile template.

- Perform a query in the list for an existing promotion profile that you can use as a template for a new promotion profile.

5 Complete the necessary fields in the Promotion Profile list.

Some fields in the Promotion Profile list are described in Table 22.

Table 22.   Selected Fields Found in the Promotion Profile List

Field	Comments
Consumption End Offset	The number of days from the start of the consumption to the end of the consumption.
Consumption End Offset Day	The day of the week on which consumption will end. This is automatically determined based on the Consumption End Offset.

Table 22.   Selected Fields Found in the Promotion Profile List

Field	Comments
Consumption Start Offset	The number of days from the start of the promotion to the start of consumption.
Consumption Start Offset Day	The day of the week on which consumption will start. This is automatically determined based on the Consumption Start Offset.
Primary	Designates the primary account promotion profile.
Promotion End Offset	The number of days from the start of the promotion to the end of the promotion.
Promotion End Offset Day	The day of the week on which the promotion will end. This is automatically determined based on the Promotion End Offset.
Promotion Start Offset	The default for this field is 0.
Promotion Start Offset Day	The day of the week on which the promotion will start. LOV Type: DAY_NAME
Shipment End Offset	The number of days from the start of shipments to the end of shipments.
Shipment End Offset Day	The day of the week on which the shipments will end. This is automatically determined based on the Shipment End Offset.
Shipment Start Offset	The number of days from the start of the promotion to the start of shipments. This number can be negative.
Shipment Start Offset Day	The day of the week on which the shipments will start. This is automatically determined based on the Shipment Start Offset.

Viewing Corporate Promotions

Key account managers can view information associated with corporate promotions, such as corporate promotions, products, or literature, to determine whether their accounts should take part in the corporate promotions.

To view corporate promotions

1 From the application-level menu, choose View > Site Map > Corporate Promotions.

2 In the Corporate Promotions list, select the corporate promotion.

For a description of the fields in this view, see "Creating Corporate Promotions" on page 159.

To view corporate promotions in a Gantt chart

■ Navigate to Corporate Promotions > Calendar.

To view promoted products of a corporate promotion

■ Navigate to Corporate Promotions > Promoted Products.

To view literature for a corporate promotion

■ Navigate to Corporate Promotions > Literature.

To view spending and volume performance of plans

■ Navigate to Corporate Promotions > Product Performance.

The middle list in this view displays all plans that contain the account promotions that are based on the selected corporate promotion.

The bottom form in this view displays estimated and actual volume of either promotion volume or fund spending by all accounts shown in the middle list.

Simulating Promotions for Promoted Products and Categories

Promotion simulations allow key account managers to simulate the results of a promotion that is under consideration. Parameters that managers use to simulate the promotion include the period of the promotion, the category or product being promoted, the account where the promotion will take place, the promotion tactics, and the penetration of the promotion within the account (% ACV Promoted).

Promotion simulation also requires that lift factors be imported and stored in the <YourProductName> application. Lift factors indicate the expected lift when a category or product is promoted at an account, during a certain period, and with specific tactics. The combination of lift factors with the other promotion parameters allows promotion simulation to determine incremental and total volume.

NOTE: Lift factor information can be obtained from a third-party syndicated data provider. The lift factors can be either product-specific or category-specific. Lift factors are imported into the product and category lift tables using Siebel Enterprise Integration Manager (EIM). For more information, see *Siebel Enterprise Integration Manager Administration Guide*.

Table 23 describes selected fields in the Simulation form that are used to simulate product and category promotions.

Table 23. Selected Fields in the Simulation Form

Field	Comments
Extended Baseline	This value is the product of multiplying (Simulated Baseline)(%ACV Promoted)(Factor).
Factor	This value is used to account for partial periods. (For example, a period of only three days)
Lift Factor	The value that is used to determine simulated incremental volume.
Period	Time period for which the simulated promotion is valid.
Simulated Baseline	The baseline volume off of which the lift factor is applied.
Simulated Incremental	Incremental volume.
Simulated Total	Total volume from simulated promotion (Extended Baseline + Simulated Incremental).

NOTE: Simulation can be performed at either a category or a product level, but not at both simultaneously.

Promotion Simulation for Promoted Products

Key account managers simulate the outcome of promoting products to determine the appropriate mix of products for a promotion. Before they begin the simulation, they must import lift factors for the product. Each lift factor is specific to an account, weekly period, and tactic.

After the product lift factors are imported and available in the <YourProductName> application, the key account managers have two simulation options:

■ To simulate promotion of a product outside of a promotion

■ To simulate promotion of a product as part of a promotion

For information on adding promoted products to promotions, see "To add products to a promotion" on page 178.

NOTE: To simulate a product promotion, lift factors for the product must be imported and stored in the product lift factor table (S_PROD_LFT_FACTOR).

To simulate promotion of a product outside of a promotion

1 Navigate to the Promoted Products screen.

2 In the Promoted Products list, perform one of the following actions:

- Query for a promoted product.

- Click New to create a new promoted product.

3 In the More Info form, fill in the following fields in the order presented:

- Account

- Tactics

- % ACV Promoted

- Start Date

- End Date

4 Click the Simulation view tab.

5 In the Simulation list, click Simulate.

In the Simulation list, the results of the simulated promoted product appear.

6 Modify any of the fields in Step 3 and repeat Step 4 and Step 5 to generate another simulation.

To simulate promotion of a product as part of a promotion

1 Navigate to the Promotions screen.

2 Create a promotion.

3 Add a product to the promotion you created in Step 2.

NOTE: For more information on adding a product to an account promotion, see "To add products to a promotion" on page 178.

4 Click the Simulation view tab.

5 In the Simulation list, click Simulate.

In the Simulation list, the results of the promotion simulation appear.

Modify any of the fields you used to create a promotion profile in Step 2 and repeat Step 4 and Step 5 to generate another simulation.

Promotion Simulation for a Category

Key account managers can simulate the outcome of promoting a category. Before they begin the simulation, they must import lift factors for the category. Each lift factor is specific to an account, weekly period, and tactic.

NOTE: To simulate a category promotion, lift factors for the category must be imported and stored in the category lift factor table (S_CATG_LFT_FACTOR).

To simulate a category promotion

1 Navigate to the Promotions screen.

2 Select a promotion in the Account Promotions list.

3 Fill in the following fields:

■ Category

■ Tactics

■ % ACV Promoted

■ Period

4 Click the Simulation view tab.

5 Click Simulate.

In the Simulation list, the results of the simulated category promotion appear.

Viewing and Copying Lift Factors

Lift factors are used by key account managers to determine incremental volume at their accounts during promotion simulation. A lift factor is based on the promotional tactic, the account, and the period of time over which the promotion will be run. Typically, customers can purchase lift factor data from third-party syndicated data providers and import them into Siebel base tables.

To view lift factors available for promotion simulation

1 Navigate to the Lift Factors screen.

2 Click the Show drop-down list to see a list of the types of Lift Factors that you can view.

NOTE: You can view both category and product lift factors as subviews of Accounts.

To copy a lift factor

1 Navigate to the Lift Factors screen.

2 In the Lift Factors list, copy the desired lift factor.

NOTE: You can view both category and product lift factors as subviews of Accounts.

End User Procedures

Creating Plans

Key account managers can create plans and then create account promotions for their plans. These plans depict aggregate results of the promotions. For each plan, key account managers can also enter an ROI target. After a key account manager has run promotions in a plan, the key account manager can check to see whether the ROI target was met.

NOTE: Key account managers can also create a plan by copying an existing plan and giving it a new name. This can save considerable time if the plans have similar attributes. When copying a plan, all active discretionary promotions within the plan, as well as their promoted products, are copied.

To create a plan

1 Navigate to the Plans screen.

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

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

Fields	Comments
Account	Account for which the plan was created.
Active	If checked, indicates that the plan is active.
Actual Base Qty	Assumed to be equal to the Estimated Baseline Qty.
Actual Funds	This calculated field displays the total paid payments for all promotions in the plan.
Actual Incremental Qty	This field displays the Actual Total Qty minus the Actual Base Qty.
Actual ROI	This calculated field displays the Actual Total Qty divided by the Actual Funds.
Actual Total Qty	By default, this field displays the sum of all shipments associated with the promoted products for the plan's promotions. Any shipment record can be associated with multiple accounts, periods, or products within the plan.

Fields	Comments
Estimated Base Qty	By default, this field displays the sum of all estimated baselines associated with the promoted products for the plan's promotions.
	Any baseline quantity can be associated with multiple accounts, periods, or products within the plan.
Estimated Funds	The amount of the deals that have been allocated for each of the promotions in the plan.
Estimated Incremental Qty	This field displays the Total Incremental Qty.
Estimated ROI	The value in this field is calculated by dividing the Estimated Total Qty by the Estimated Funds.
Estimated Total Qty	The sum of the estimated baseline quantity and the estimated incremental quantity.
Name	The name of the plan.
Organization	Organization for which the plan was created.
Period	Time period for which the plan is active.
Revision	Revision number of the plan.
Status	Status of the plan.
	LOV Type: PROMOTION_STATUS
Target ROI	Target return on investment.

To add a new promotion to a plan

1 Navigate to the Plans screen.

2 In the Plans list, select a plan.

3 Click the Promotions view tab.

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

5 In the Promotion field, click the Promotion select button.

6 From the Promotion dialog box, create a new promotion or select an existing corporate or discretionary promotion.

- To create a new promotion, click New. Fill in the fields, (some of the fields are described in Table 24) and then click OK.

- To select an existing promotion, select a promotion and click OK.

Table 24. Selected Fields in the Promotion Dialog Box

Fields	Comments
Name	Name given to the promotion by brand or sales management or by the key account manager for discretionary promotions.
Period	The period of time for which the promotion is valid.

NOTE: Each time you create a new account promotion, < YourProductName > also creates a corresponding discretionary promotion that serves as a template for the new account promotion.

Rolling Up Overlapping Shipment and Baseline Records

When a plan includes two or more promotions for the same account and product, it is not unusual for a particular shipment or baseline record to *overlap*, or appear more than once in the plan. When the baseline or shipment values are rolled up from the promotion to the plan, these overlapping records could be counted each time they appear in the plan, or only once. When the key account manager uses the Calculate button, the overlapping values are counted only once.

To roll up overlapping shipment or baseline records within a plan

1 Navigate to the Plans screen.

2 In the Plans list, select a plan.

3 Optional. On the More Info form, click the Calculate button.

Each overlapping baseline or shipment record is counted only once and rolled up from the promotion level to the plan level.

Creating Deals for Promotions

Key account managers can create deals for promotions.

For information on creating deals for promoted products, see "Creating a Deal for a Promoted Product" on page 179.

To create a deal for a promotion

1 Navigate to the Promotions screen.

2 In the Promotions list, select a promotion.

3 Click the Deals view tab.

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

Table 25 describes some of the fields in the Deals list.

Table 25.   Selected Fields in the Deals List

Fields	Comments
Amount	Amount of the deal.
Deduction	■ Y indicates that the deal can be paid by using a deduction. ■ N indicates that the deal cannot be paid by using a deduction. The default value for this field is N. For more information on deductions, see Chapter 9, "Deductions."
Estimated Pay Date	Estimated date of payments paid from the deal.
Fund	Name of the fund from which the allocation will be made.
Fund ID	System-generated identification number of the fund.
Id	System-generated identification number of the deal.
Type	Type of deal, such as Bill Back, Fixed Cost, or Off Invoice. Select a value from the drop-down list. LOV Type: MDF_ALLOCATION_TYPE

Table 25.   Selected Fields in the Deals List

Fields	Comments
Stackable	Indicates that the deal is not exclusive, and can be stacked with other existing deals. In the standard product, this field does not drive any behavior in the application; further customization is necessary to do so.
Bundle	A check in this box indicates that the deal can contain bundled products.
Price Adjustment Type	The type of price adjustment — for example, % Markup or Discount Amount.
Price Adjustment Amount	The amount of price adjustment that will be given with the deal. This field adds additional dimensions to the deal.

Adding Products to Account Promotions

When a key account manager adds products to an account promotion, those products are called *promoted products*. In the Promoted Products list, a key account manager can add products to a promotion or remove products from it and maintain information about a product that is specific to the promotion.

The key account manager can choose to add all the promoted products that belong to a specific category and all its subcategories as long as those products are on the account's authorized distribution list.

When a product has been designated as a promoted product, it can be associated with baseline and shipment data. For more information, see "To associate baseline and shipment data with promoted products" on page 182.

Key account managers can also simulate the results of promoting a product by using product lift factors. For more information on promoted product simulation, see "Simulating Promotions for Promoted Products and Categories" on page 169.

To add products to a promotion

1 Navigate to the Promotions screen.

2 In the Account Promotions list, select a promotion.

3 Click the Promoted Products view tab.

4 In the Promoted Products list, add a product to the list. You can do this in one of two ways:

- Click New to add a new promoted product, select a product from the Pick Product dialog box, and then click OK.

- Click Add to add an existing promoted product whose start date, end date, and account match the promotion's start date, end date, and account. Select a product from the Promoted Products dialog box, and click OK.

5 Optional. Click Products.

Clicking the Products button adds all promoted products that are both on the account's authorized distribution list and associated with the categories and subcategories assigned to the promotion.

Repeat Step 4 to add more products to a promotion.

Creating a Deal for a Promoted Product

Key account managers can create and view a list of deals that fund a promoted product, and view information about each deal's planned and actual spending.

NOTE: A deal for a promoted product rolls up to a promotion only when it is created for a promoted product that is already associated with a promotion. If a deal is added to a promoted product that is not associated with a promotion, the deal will *not* roll up to the promotion if the promoted product is later associated with a promotion.

To create a deal for a promoted product

1 Navigate to the Plans screen.

2 In the Plan list, select the plan containing the promoted products.

3 Click the Promotions view tab.

4 In the Promotions list, click the Promotion hyperlink.

The Account Promotions view appears, displaying the list of products in the promotion.

5 Click the Promoted Products view tab.

6 In the Promoted Products list, click the Product hyperlink of the promoted product for which you want to create a deal.

The Promoted Products Detail view appears.

7 Click the Deals view tab.

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

Some fields are described in Table 25 on page 177.

Associating Bundled Products with Deals

Key account managers can bundle several products and associate them with deals. The deals can be used to fund either account promotions or promoted products.

To associate bundled products with a category promotion

1 Navigate to the Promotions screen.

2 In the Account Promotions list, select the promotion to which you want to associate bundled products.

3 Click the Deals view tab.

4 In the Deals list, select the deal.

5 Click the Details subview tab.

6 If the Bundle check box is not checked, then check it now.

> **NOTE:** You will not be able to add bundled products to the promotion unless this box is checked.

7 Click the Bundled Products subview tab.

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

Some of the fields in the Bundled Products list are described in Table 26.

Table 26.   Selected Fields in the Bundled Products List

Field	Comments
Adjustment Type	Price adjustment applied to bundled product.
Adjustment Value	Amount of priced adjustment.
Product	Product to bundle with promoted product.
Quantity	Units of bundled product.

To associate bundled products with a promoted product

1 Navigate to the Promoted Products screen.

2 In the Promoted Products list, select the promoted product with which you want to associate bundled products.

3 Click the Deals view tab.

4 In the Deals list, select the deal.

5 Click the Bundled Products subview tab.

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

Some fields are described in Table 26 on page 181.

Associating Baseline and Shipment Data with Promoted Products

Key account managers can associate baseline and shipment data with promoted products. Baseline and shipment data can be associated only with promoted products and cannot be directly associated with a promotion.

A baseline record or a shipment record can be associated with more than one promoted product. For example, if you add the same product to two promotions, each for the same account and each with the same promotion end dates, you create two promoted products that share the same baseline and shipment record.

To associate baseline and shipment data with promoted products

1 Navigate to the Promotions screen.

2 In the Account Promotions list, select a promotion.

3 Click the Promoted Products view tab.

4 In the Promoted Products list, click Baseline Data, then Shipment Data.

The system identifies all baseline records that exist during the promotion Start and End periods for that account and promoted product, and associates these records with the promoted product.

Baseline and shipment data are adjusted for partial weeks.

NOTE: Use the Baseline Data button before the promotion. Use the Shipment Data button after the promotion to evaluate the promotion.

5 In the Promoted Products list, select a product.

6 Drill down on the Product hyperlink.

The Promoted Product Detail view appears.

7 Click the Baseline view tab or the Shipment view tab.

The Baseline displays all baseline data for all periods that fall between the shipment start date and the shipment end date for the account and the selected product.

The Shipment view displays all shipment data for all periods that fall between the shipment start date and the shipment end date for the account and the selected product.

8 In the Baseline view tab, enter values in the Incremental Qty column for each period in the promotion.

These values will be rolled up into the estimated incremental value for the promoted product, the promotion, and the plan.

Some of the fields in the Baseline and Shipment views are described in Table 27.

Table 27.   Some of the Fields in the Baseline and Shipment Views

Field	Comment
Baseline Cases	The quantity associated to sales volume without a promotion.
PromoBaseline Pct	Promotion Baseline Percent. An adjustment made when the first or last week of a promotion is not the same duration as a full week in the corresponding baseline.
PromotionBaseline Cases	The quantity derived by multiplying Baseline Cases times Promotion Baseline percent.
Shipped Qty	The quantity associated to sales volume without a promotion.
Promotion Shipment%	Promotion Shipment Percent. An adjustment made when the first or last week of a promotion is not the same duration as a full week in the corresponding shipment record.
Promotion Shipped Qty	The quantity derived by multiplying Shipped Qty times Promotion Shipment percent.

Adding Attachments to Promotions

Key account managers can view attachments and attach documents, such as proof of performance, to account plan promotions.

To add attachments to a promotion

1 Navigate to the Promotions screen.

2 In the Account Promotions list, select a promotion.

3 Click the Attachments view tab.

4 In the Attachments list, add a record.

5 Click the Name select button.

6 In the Add Attachment dialog box, select an attachment and click Add.

In the Attachments list, the selected attachment appears.

Associating Objectives with Promotions

Key account managers can associate objectives with account promotions. Objectives provide goals for promotions.

To associate objectives with promotions

1 Navigate to the Promotions screen.

2 In the Account Promotions list, select a promotion.

3 Click the Objectives view tab.

4 In the Objectives list, add a record.

5 Click the Objective select button and select an objective from the dialog box and click OK.

6 Complete the additional necessary fields.

Obtaining Approvals for a Plan

A key account manager can submit a plan for multi-level approval, with each approver changing the status of the plan to signify acceptance or rejection. The end result of a completed approval process is that the status of the deals associated with the plan changes to Committed.

NOTE: When the status of the deals associated to a plan is Committed, the requested funds are allocated to the plan.

The two final plan status values provided in the standard product both change the status of the associated deals to Committed but differ in the following way:

■ **Accepted.** Makes the plans records read-only (uneditable)

■ **Presented.** Does not make the records read-only

NOTE: After the status of a plan is changed to Accepted, it cannot be revised or modified in any way. If a key account manager anticipates the need to make changes to it, the status should be changed to Presented.

To submit a plan

1 Navigate to the Plans screen.

2 In the Plans list, select a plan.

3 In the Status drop-down list, select Pending Approval.

When a key account manager submits a plan for approval to the regional sales manager, the sales manager decides whether to accept it. If the regional sales manager approves the plan, the sales manager changes the status to Approved-Pending Review. When the plan has received approval from the customer, its status is changed to Accepted or Presented.

To revise a plan

1 Navigate to the Plans screen.

2 In the Plans list, select a plan.

3 In the Plan form, click Revise.

4 Edit the fields.

Committing Target Account Lists to a Corporate Promotion

You can commit target account lists to a corporate promotion. The target accounts that will be available are those that belong to the organization of which the user is an account team member.

NOTE: In the Target Accounts view, you can commit target accounts to a promotion whether or not you are connected to a network.

To commit a target account to a corporate promotion

1 Navigate to Corporate Promotions > Target Accounts.

2 In the Corporate Promotions list, select a promotion.

The corporate promotion you select acts as a template for the account promotion you are creating when you assign target accounts to that corporate promotion.

3 Click the Target Accounts view tab and choose the action that corresponds to your situation:

- **If you are connected to a network**. Query for the accounts to which you want to target the promotion

- **If you are not connected to a network**. Perform one of the following actions:

  □ Query for accounts you want to target.

  □ Click the apply target list button, located in the row of buttons next to the history button. Select one or more target accounts in the Apply Target List dialog box and click OK.

4 Select one or more accounts in the Target Accounts list and click Commit.

The selected target accounts appear in the sublevel Accounts list and are now committed to the corporate promotion. You have also created an account promotion that is based on the corporate promotion template.

Creating Promotions for an Account

Key account managers can create promotions for individual accounts that are not part of plans. They add products to the promotions and create deals to cover the cost of the promotions.

Key account managers can use corporate promotions as a template to create their account promotions. The corporate promotion can be used as many times as desired.

The ID of the template will display rather than and ID for that record. This allows users to search for linked promotions, using this ID value.

To find the ID for a copied record, use the application-level menu to choose Help > About Record.

Promotions are established and run for categories of products. Key account managers can simulate promotions using category lift factors. For information on promotion simulation, see "Simulating Promotions for Promoted Products and Categories" on page 169.

To create promotions for accounts

1 Navigate to the Promotions screen.

2 In the Account Promotions view, click New.

3 In the Promotions dialog box, add a record by using one of the following options:

  ■ Click the New button to create a new promotion

  ■ Query for an existing promotion that you can use as a template

4 Complete the necessary fields in the record.

   Some of the fields in the Account Promotions view are described in Table 28.

Table 28.   Selected Fields in the Account Promotions View

Field	Comments
Account	Account for which the promotion was created.
Active	A check mark indicates that the promotion is still active.

Table 28. Selected Fields in the Account Promotions View

Field	Comments
Category	Product category associated with the account.
Organization	The name of the organization executing the promotion.
Profile	The promotion profile associated with the promotion.
Promotion	Name of an existing promotion created by brand or sales management, or by the key account manager. This field is auto-filled if the account has a primary account promotion profile.
	May also be a new name given to the promotion you create.
Revision	The revision number of the promotion.
Status	Current status of the promotion.
	LOV Type: PROMOTION_STATUS
Type	Type of promotion on which the account promotion is based.
Actual Baseline Volume	This is assumed to be equal to estimated base volume.
Actual Funds	This calculated field displays the total paid payments for the promotion.
Actual Incremental Volume	This field displays the actual total volume minus the actual baseline volume.
Actual Total Volume	The field displays the sum of the shipments.
Consumption End Date	Date when consumer purchases under this promotion end. This date can be after the promotion end date.
Consumption Start Date	Date when the products are available for purchase by consumers. If consumption information for each promotion is obtained from external databases, the start and end dates can be used to restrict the list of consumption records. This date must be within the period of the promotion.
Estimated Baseline Volume	This field displays the total estimated baseline volume rolled up from promoted products.
Estimated Funds	This amount of the deals that have been allocated for the promotion.

Table 28.   Selected Fields in the Account Promotions View

Field	Comments
Estimated Incremental Volume	This field displays the total incremental volume rolled up from promoted products.
Estimated Total Volume	This sum of the estimated baseline volume and the estimated incremental volume.
Price List	The price list associated with the promotion.
Promotion End Date	Date when the promotion ends.
Promotion Start Date	Date when the promotion begins.
Shipment End Date	Date when shipments for this promotion will end. The date cannot be after the Promotion End Date.
Shipment Start Date	Date when shipments for this promotion can begin. This date can be before the promotion start date.

Trade Promotions FAQs

The following are some frequently asked questions (FAQs) about Trade Promotions.

1 What does ROI mean in terms of the Consumer Goods Trade Promotions module?

ROI for Trade Promotions helps determine the volume generated for each dollar of spending.

2 How is ROI calculated?

ROI is calculated with the following equations:

Estimated ROI = Estimated Total Volume / Estimated Total Spending
Actual ROI = Actual Total Volume / Actual Total Spending

3 Can the ROI calculation be modified?

The calculation uses cases divided by money as an example of one metric for measuring promotional effectiveness. Depending on their business requirements, customers can configure the Trade Promotions module to divide money by money.

4 Can fields other than quantity fields be exposed on the Trade Promotions user interface?

Currently, only quantity (estimated and actual volume) are exposed on the user interface. However, customers can configure the module to expose fields for money, if desired.

Information for Configurators of Trade Promotions

The following section contains information that may be useful to configurators making changes to the promotions features.

Specialized Methods Invoked

The procedures documented in this chapter include buttons that invoke specialized methods, as described in Table 29.

Table 29.   Buttons and Methods for Trade Promotions Configurators

Button	Name of Method	Description	Supported On
Add (Promoted Products)	ShowPopup	Pops up promoted products not associated with any promotion whose start and end dates and account match that of the promotion.	Bus Comp Layer
	OK	Adds the selected products to the promotion.	
Baseline Data	OnBaselineData	Associates baseline records based on account, promoted product, and promotion start and end dates. Baseline data is adjusted for partial weeks. Then a user can add incremental volume to each baseline record.	Bus Comp Layer
Calculate	OnAdjust	Finds occurrences of overlapping baseline or shipment records for a plan and removes double counting, if it exists.	Bus Comp Layer
Commit	CommitAccnt	Writes account names from temporary targeting tables to permanent tables where promotions are stored.	Applet Layer
Intersection	ButtonIntersection	Intersection of lists.	Applet Layer
Products	OnCatalogProducts	Finds all products associated to the category defined for the promotion at all levels and adds them as promoted products of the promotion on the account's authorized distribution list.	Bus Comp Layer
Revise	OnPromotionRevise	Revises promotion.	Bus Comp Layer

Information for Configurators of Trade Promotions

Table 29.   Buttons and Methods for Trade Promotions Configurators

Button	Name of Method	Description	Supported On
Shipment Data	OnShipmentData	Associates shipment records based on account, promoted product, and shipment start and end dates. Shipment data is adjusted for partial weeks.	Bus Comp Layer
Simulate (Promotion)	SimulateCategory	Simulates the promotion based on category lift factors.	Bus Comp Layer
Simulate (Promoted Product)	SimulateProduct	Simulates a promoted product based on product lift factors.	Bus Comp Layer
Union	ButtonUnion	Union of lists.	Applet Layer

User Properties

The following user properties are used by Trade Promotions:

■ **Use Authorized Products Only.** This user property can be set to either TRUE or FALSE. It turns off and on a validation performed when the Products button is clicked in the CG Promotion List View Non-Corporate view, which is accessed by navigating to Site Map > Promotions > Account Promotions > More Info.

By default, clicking the Products button automatically adds products to a promotion, based on the promotion's category. Before adding the products, it performs a validation against the account's authorized distribution list (ADL). If the product is part of the category, but not included in the account's ADL, it will not be added to the promotion.

To disable this validation, change the value of the user property.

■ **Baseline Dates** This is a Business Component object type user property on the CPG Plan Account Promotion Product view. This user property determines the Start and End dates used to associate baseline data to a promotion. The following table describes how using different Values with this user property affects the Start and End dates.

Value	Behavior
Promotion	Uses the promotion Start and End dates.
Consumption	Uses the consumption Start and End dates.
Shipment	Uses the shipment Start and End dates.

When the user property is not used, the default behavior is equal to using Promotion.

For more information about user properties, see *Siebel Tools Guide*.

Trade Promotions

Information for Configurators of Trade Promotions

Trade Funds 8

This chapter covers the procedures necessary to set up and assign funds to promotions and promoted products.

About Funds

A *fund* is a named appropriation of money to be spent on promotions over a specific period of time for specific accounts and specific categories and products. There are two types of funds: fixed and accrual. *Fixed* funds are fixed amounts of money allocated in a lump sum. *Accrual* funds are funds in which the amount of money is calculated based on product movement.

Marketing administrators set up funds and allocate larger funds into child funds for use by key account managers. Key account managers can manage funds, including creating deals for promotions, submitting payments against deals, and tracking fund activities.

Business Scenario for Funds

This scenario is an example of a workflow performed by marketing administrators and key account managers. Your company may follow a different workflow according to its business requirements.

You are a key account manager at a large beverage manufacturer. Your company has developed a new category of fruit-flavored beverages. You plan to run a promotion at your account with a feature and display of the new category. To pay for the promotion, you use funds established by the marketing administrator. You set aside funds to pay for the promotion by creating a deal for the feature and display.

After the promotion has run, you submit payments against the deal to pay for the promotion.

Example Workflow for Funds

Funds are typically created by marketing administrators for use by key account managers. The workflow for funds is explained in the following paragraphs.

Administrator Procedures

When working with funds, marketing administrators or other personnel with administrative privileges complete the following procedures:

1 **Create a fund.** You can automatically generate or manually create a fund. You enter a period, category or products, and a fund type, either fixed or accrual. For information on performing this procedure, see "Creating a Fund" on page 199.

2 **Adjust a fund.** You can make positive or negative adjustments a fund to reflect changes in market conditions. For information on performing this procedure, see "Adjusting a Fund" on page 203.

3 **Review a deal and the payments for a fund.** You can review all deals and payments made against a fund. For information on performing this procedure, see "To review fund payments" on page 206.

4 **Reconcile a deal.** You can reconcile deal amounts against all payments for that particular deal. For information on performing this procedure, see "To reconcile a deal to the associated payments" on page 206.

5 **Close a deal.** You can prevent any future payments against a deal by closing the deal. For information on performing this procedure, see "To close a deal" on page 207.

End-User Procedures

When working with funds, key account managers complete the following procedures:

1 **Transfer money between funds.** End users can transfer fund amounts between funds to reflect changes in the market conditions. For information on performing this procedure, see "Transferring Fund Amounts" on page 208.

2 **Approve a fund transfer.** You can view and approve amounts transferred between funds. For information on performing this procedure, see "To approve a fund transfer" on page 209.

3 **Create a deal and request payment to pay for a promotion.** End users can create deals to set aside money and request payments for promotions or promoted products. For information on performing this procedure, see "Submitting Payments Against Funds" on page 209.

4 **Review funds and payments.** End users can review funds, deals, and payments to track estimated, committed, and actual spending. For information on performing this procedure, see "Reviewing Funds, Deals, and Payments" on page 211.

Administrator Procedures

This section provides instructions for the following procedures:

Creating a Fund

Marketing administrators create funds for use by key account managers. Funds can be manually created by marketing administrators or automatically generated using fund groups. Fund groups are used to hold created funds and have generic information that administrators can apply when generating a fund. There are two types of funds, fixed and accrual, that can be created by marketing administrators.

Creating a Fixed Fund

Fixed funds have a predetermined amount (for example, $5,000) allocated in a lump sum that can be used over a specified period of time. Administrators can manually create or automatically generate fixed funds.

To manually create a fixed fund

1 From the application-level menu, choose View > Site Map > Data Administration > Funds.

2 In the Fund list, add a new record.

3 Click the Type drop-down list and select Fixed.

4 Fill in the fields.

To automatically generate a fixed fund

1 From the application-level menu, choose View > Site Map > Data Administration > Fund Groups.

2 In the Fund Groups list, add a new record.

3 Click the Type drop-down list and select Fixed.

4 Click the Accounts view tab.

5 In the Accounts list, add eligible accounts to the fund.

To be eligible, an account must have the following attributes:

■ The account must have the same organization as the fund group.

■ The account has the "Fund Eligible" flag checked.

> **NOTE:** To verify that the Fund Eligible flag is checked, navigate to the Accounts screen > More Info.

6 Fill in the percentage field for each account.

The value in the Percentage field determines how much of the associated Fund will be allocated to the account.

7 Click the Target Products view tab.

8 In the Target Products list, click Products.

All products of the target category and any sub-categories are automatically listed.

9 In the Funds list, click Generate.

Fixed funds are created based on the fund group and the accounts.

Creating an Accrual Fund

Accrual funds are calculated by product sales (for example, $1.50 per case x 5000 cases sold = $7,500). Once established, they can be used over a specified period of time. Administrators can manually create or automatically generate accrual funds.

To manually create an accrual fund

1 From the application-level menu, choose View > Site Map > Data Administration > Funds.

2 In the Fund list, add a new record.

3 Click the Type drop-down list and select Accrual.

4 Complete the necessary fields

Some of the fields in the Funds list are described in Table 30.

Table 30.   Selected Fields in the Funds List

Fields	Comments
Account	The account that is eligible for the fund.
Source Category	The category whose associated products generate accruals.
Target Category	The category whose associated products may use the fund.
Basis	The value used to accrue funds (for example, Cases or Revenue). LOV Type: CS_FUND_BASIS
Basis Period	The period of time for which the basis is valid.

To automatically generate an accrual fund

1 From the application-level menu, choose View > Site Map > Data Administration > Fund Groups.

2 In the Fund Groups list, add a new record.

3 Click the Type drop-down list and select Accrual.

4 Click the Accounts view tab.

5 In the Accounts list, add eligible accounts to the fund.

To be eligible, an account must have the following attributes:

■ The account must have the same organization as the fund group.

■ The account has the "Fund Eligible" flag checked.

6 Click the Target Products view tab.

7 In the Target Products list, click Products.

All products of the target category and any subcategories are automatically listed.

8 Click the Source Products view tab.

9 In the Source Products list, click Products.

All products of the source category and any subcategories are automatically listed.

10 In the Funds list, click Generate.

Accrual funds are created based on the fund group and the accounts.

Adding a Child Fund to a Parent Fund

The Funds module supports an infinite funds hierarchy. For example, a parent fund can have child funds, which in turn can have child funds. This allows marketing administrators to break up into smaller funds those fund records that have been transferred from an external database through Siebel Enterprise Integration Manager (EIM).

To add a child fund to a parent fund

1 From the application-level menu, choose View > Site Map > Data Administration > Funds.

2 In the Funds list, select a parent fund.

3 Click the Child Funds view tab.

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

To add a grandchild fund to a fund

1 From the application-level menu, choose View > Site Map > Data Administration > Funds.

2 In the Funds list, select a parent fund.

3 Click the Child Funds view tab.

4 In the Child Funds list, select a child.

5 Drill down on the hyperlink of the child fund.

In the Funds list, the child fund appears.

6 In the Child Funds list, add a new record (the grandchild fund) and complete the necessary fields.

Adjusting a Fund

You can adjust the amount of a fund (either positively or negatively) after the fund has been created. Typically, this is done to reflect changes in market conditions.

To create an adjustment for a fund

1 From the application-level menu, choose View > Site Map > Data Administration > Funds.

2 In the Funds list, select a fund.

3 Click the Adjustments view tab.

4 In the Adjustments list, add a new record.

5 Fill in the fields.

Reviewing Deals

You can review a deal for a promotion or for a promoted product, or review all the deals that have been created for a fund.

To review a deal for a promotion

1 Navigate to the Promotions screen.

2 In the Account Promotions list, select a promotion.

3 Click the Deals view tab.

4 Select the deal you want to review.

5 Click the Details subview tab and review the available fields.

Table 31 lists the fields that are available for review in the Deals Details form.

Table 31.   Fields in the Deals Details Form

Field	Comments
Amount	The amount of the deal.
Bundle	A check in this box indicates that the deal can contain bundled products.
Deal Id	System-generated identification number of the deal.
Deduction	■ Y indicates that the promotion can be paid by using a deduction. ■ N indicates that the promotion cannot be paid by using a deduction. The default value for this field is N. For more in formation on deductions, see Chapter 9, "Deductions."
Est. Pay Date	Estimated date of payments paid from the deal.
Fund	Name of the fund from which the allocation will be made.
Fund Id	System-generated identification number of the fund.
Max. Qty	The maximum quantity of the deal.
Min. Qty	The minimum quantity of the deal.

Table 31.   Fields in the Deals Details Form

Field	Comments
Payments Paid	The amount of payments that have been paid for the deal.
Payments Pending	The amount of pending payments for the deal.
Payments Submitted	The amount of payments that have been submitted for the deal.
Price Adjustment Amount	The amount of price adjustment that will be given with the deal. This field adds additional dimensions to the deal.
Price Adjustment Type	The type of price adjustment — for example, %Markup or Discount Amount. LOV Type: PRICER_CALCULATION_SIMPLE_TYPE
Stackable	Indicates that the deal is not exclusive, and can be stacked with other existing deals. In the standard product, this field does not drive any behavior in the application; further customization is necessary to do so.
Type	Fund type, either Accrual or Fixed. LOV Type: MDF_ALLOCATION_TYPE

To review a deal for a promoted product

1 Navigate to the Promoted Products screen.

2 In the Promoted Products list, select a product.

3 Click the Deals view tab.

4 In the Deals list, select a deal.

5 Click the Details subview tab.

Table 31 on page 204 lists the fields that are available for review.

To review deals created for a fund

1 From the application-level menu, choose View > Site Map > Data Administration > Funds, and select a fund.

2 Click the Deals view tab.

The deals that have been created from the fund and the payments from the fund appear.

Reviewing Fund Payments

You can review all payments made against particular funds.

To review fund payments

1 From the application-level menu, choose View > Site Map > Data Administration > Funds.

2 In the Funds list, select a fund.

3 Click the Payments view tab.

The Payments list displays all payments made against the fund.

Reconciling a Deal

You can reconcile deal amounts against all payments for that particular deal.

To reconcile a deal to the associated payments

1 From the application-level menu, choose View > Site Map > Data Administration > Fund Deals.

2 In the Deals list, select a deal.

3 Click Release Commitments.

The deal amount is updated to the sum of all payments.

Closing a Deal

You can close a deal when you want to prevent any future payments from being made against the deal.

NOTE: If you plan to reconcile and close the same deal, reconcile the deal before you close it. See "Reconciling a Deal" on page 206.

To close a deal

1 From the application-level menu, choose View > Site Map > Data Administration > Fund Deals.

2 In the Deals list, select a deal.

3 From the Status drop-down list, select Closed.

The deal is closed and no further payments can be made against the deal.

End-User Procedures

This section provides instructions for the following procedures:

Transferring Fund Amounts

Key account managers can transfer amounts between funds. Typically, transferring funds requires approval from a regional sales manager or a marketing administrator. For information on approving fund transfers, see "Approving a Fund Transfer" on page 209.

To transfer a fund amount

1 Navigate to the Accounts screen.

2 In the Accounts list, select an account.

3 Click the Funds view tab.

4 In the Funds list, select a fund.

5 Click the appropriate subview tab and add a new record.

■ If you want to transfer an amount into this fund, click the Transfers In subview tab.

■ If you want to transfer an amount out of this fund, click the Transfers Out subview tab.

NOTE: You can transfer money between funds of different currencies.

6 Fill in the fields.

7 In the Submitted To field, select the employee responsible for approving the transfer.

The transfer will appear in the Transfer Approvals subview of the employee selected.

8 Change the Status field to Submitted.

Approving a Fund Transfer

Regional sales managers and marketing administrators can view and approve fund transfers.

To approve a fund transfer

1 Navigate to the Accounts screen.

2 In the Accounts list, select an account.

3 Click the Funds view tab.

4 Click the Transfer Approvals subview tab.

5 Click the Status drop-down list and select Approved.

Submitting Payments Against Funds

Before running promotions, key account managers can create deals against a promotion or promoted product. Once they have run the promotion, they submit payments against the deals.

To create a deal for a promotion

1 Navigate to the Promotions screen.

2 In the Account Promotions list, select a promotion.

3 Click the Deals view tab.

4 In the Deals list, add a new record.

5 Fill in the fields.

To create a deal for a promoted product

1 Navigate to the Promotions screen.

2 In the Account Promotions list, select a promotion.

3 Click the Promoted Products view tab.

4 In the Promoted Products list, select a product.

5 Drill down on the Product hyperlink.

The Promoted Product Detail view appears.

6 Click the Deals view tab.

7 In the Deals list, add a new record and complete the necessary fields.

To submit payments against a deal for a promotion

1 Navigate to the Promotions screen.

2 In the Promotions list, select a promotion.

3 Click the Deals view tab.

4 In the Deals list, select a deal.

5 Click the Payments subview tab.

6 In the Payments list, add a new record and complete the necessary fields.

To submit payments against a deal for a promoted product

1 Navigate to the Promotions screen.

2 In the Account Promotions list, select a promotion.

3 Click the Promoted Products view tab.

4 In the Promoted Products list, select a product.

5 Drill down on the Product hyperlink.

The Promoted Product Detail view appears.

6 Click the Deals view tab.

7 In the Deals list, select a deal.

8 Click the Payments subview tab.

9 In the Payments list, add a new record and complete the necessary fields.

Reviewing Funds, Deals, and Payments

Key account managers can review funds, deals, and payments to track estimated, committed, and actual spending.

To review funds

1 Navigate to the Accounts screen.

2 In the Accounts list, select an account.

3 Click the Funds view tab.

The Funds list displays all funds associated with the selected account.

4 Click the More Info subview tab to review the fields that are described in Table 32.

Table 32. Fields in the Funds More Info List

Field	Comments
Account	The account that is associated with the fund.
Adjustments	Adjustments to the fund amount. Includes decreases or increases to the fund amount. Excludes transfers, accruals, and payments.
Amount	The beginning amount of the fund.
Balance	The Converted Sub-Total minus Payments.
Basis	The value used to accrue funds (for example, Cases or Revenue). LOV Type: CS_FUND_BASIS
Basis End	The ending date of the basis period.
Basis Period	The period of time for which the basis is valid.

Table 32.   Fields in the Funds More Info List

Field	Comments
Basis Start	The starting date of the basis period.
Committed	An amount set aside in deals with a status of Committed or Closed.
Converted Sub-Total	The subtotal amount after currency conversion (based on the parent fund, if one exists).
Currency Code	The currency of the fund. By default, currency is derived from: ■ Account currency ■ User's currency, taken from user's division
Deal Limit	This value can be used to determine by what percentage total deals can exceed the account fund balance.
End	The ending date of the fund.
Estimated	Amount set aside in deals with status other than Committed or Closed.
Exchange Rate	The exchange rate necessary to convert the fund into the currency of its parent fund.
Fund	Name of the fund.
Fund Id	System-supplied identification number of the fund.
Organization	The organization of the fund.
Parent Id	System-supplied identification number of the parent fund of the fund.
Payment Limit	This value can be used to determine by what percentage total payments can exceed a deal.
Payments	The amount of paid payments that have been made against the fund.
Period	The period of time for which the fund is valid.
Source Category	The category of products that generates accruals.
Start	The starting date of the fund.

Table 32.   Fields in the Funds More Info List

Field	Comments
Sub-total	Calculated amount derived using the following equation: Amount + Adjustments + Transfers = Sub-total
Target Category	The category of products that can use the fund.
Transfers	Sum of the approved transfers into or out of the fund.
Type	Fund type, either Accrual or Fixed, selected from a drop-down list. Accrual funds are funds in which the amount is calculated from the products and accruals associated with the fund. Fixed funds are fixed amounts of money allocated in a lump sum. LOV Type: CPG_FUND_TYPE
Unallocated	Calculated amount derived by subtracting allocations to child funds from the fund subtotal.
Uncommitted	An amount, from a fixed fund, that has not been allocated to a child fund. This amount is calculated by subtracting the committed amount from the fund subtotal.

To request payments by the account checkbook

1 Navigate to the Accounts screen.

2 In the Accounts list, select an account.

3 Click the Checkbook view.

4 In the Checkbook list, perform one of the following actions:

- Query for a check.

- Create a new check.

5 Click the Payments subview.

6 In the Payments list, select a deal.

7 Click the Deal Id select button.

8 In the Pick Allocation dialog box, enter the amount of the payment you want to request and click OK.

Configuration Considerations

This section offers guidelines to follow when configuring the Siebel Funds module.

Setting User Properties for Funds

Table 33 lists the user properties configurators must set to control propagation of source products from fund groups to account funds.

Table 33.   User Properties for Funds

Parent Object Type	Business Component
Description	There are two user properties that can be set on the business component CS Fund Group.
	■ Populate Products value can be Y or N. Default value is N. When the value is set to Y, the source and target products at the fund group level will be populated when the Generate button is pressed to generate account funds.
	■ Total Records value is a number, for example, 10. Default value is to use the business service. If the total number of source and target records at the fund group level exceeds this number, the business service process will be used to generate the account funds. Otherwise, the client process is used to generate the account funds.
Functional Area	CS Fund Group

Specialized Methods Invoked in Trade Funds

The procedures documented in the Trade Funds chapter include buttons that invoke specialized methods, as described in Table 34.

Table 34.   Buttons and Methods for Funds Configurators

Button	Name of Method	Description	Supported On
Apply	ShowPopup	Pops up group of eligible accounts.	Bus Comp Layer
	OK	Adds fund participants to fund group.	

Table 34. Buttons and Methods for Funds Configurators

Button	Name of Method	Description	Supported On
Generate	FundGenerate	Adds account funds to fund group.	Bus Comp Layer
Products	OnCatalogProducts	Adds all products that belong to the source category or target category of fund or fund group.	Bus Comp Layer
Refresh	OnRefreshMvg	Refreshes the form.	Bus Comp Layer
Release Commitments	ReleaseCommitment	Makes the amount of the deal equal to the sum of the deal payments.	Bus Comp Layer

Configuration Considerations

Deductions　9

This chapter describes the main steps involved in managing deductions. Following the procedures given in this chapter, you will be able to:

■ Create, split, assign, research, and resolve deductions

■ Chart deduction trends and deduction management workload

About Deductions

Deductions occur when customers submit partial payment of an invoice from a consumer goods organization. The unpaid balance is known as a deduction. The consumer goods organization needs to research the reason behind the deduction, and resolve the deduction appropriately.

Types of Deductions

There are two types of deductions; each is resolved in a different manner:

- *Trade Promotions deductions.* The customer claims a deduction because of a trade promotion that is being conducted.

- *HQ deductions*. This type covers all other deductions, including late deliveries, goods arriving damaged or expired, and invoicing errors.

Classes of Deductions

Both types of deductions fall into one of two classes, which are:

- **Preauthorized (or authorized) deductions.** Representatives of your company can give customers prior approval to take deductions. For example, key account managers may authorize their customers to take deductions as reimbursement for promotional expenses. Within consumer goods organizations, these deductions are typically paid for by trade funds established to cover the cost of promotions.

- **Unauthorized deductions.** These occur when a customer takes a deduction without prior approval from your company. Some unauthorized deductions may be taken for legitimate reasons. For instance, an invoice may be in error, products may have arrived in damaged condition, or a shipment may have arrived after an agreed-upon deadline. Other unauthorized deductions may be taken for non-valid reasons. The customer may have mistakenly taken a larger trade promotion deduction than your company authorized.

Generating a Deduction

The process of generating a deduction begins when your company's accounting department receives a partial payment on a customer invoice. The deduction information can be passed through to Siebel Consumer Sector applications in several ways, depending on your company's implementation of the product.

Methods can include the following:

■ Integrating back office software with Siebel Consumer Sector applications

■ Marketing administrator creating a deduction record

Resolving Deductions

The key account manager or customer financial service representative is responsible for resolving deductions. Options for resolving deductions include:

■ Rejecting the deduction and reinvoicing the customer (chargeback)

■ Approving the deduction and applying its cost to one or more trade fund allocations

■ Writing off the deduction

■ Applying a credit memo

Business Scenarios

These scenarios are examples of workflows performed by marketing administrators, customer financial service representatives, and key account managers. Your company may follow a different workflow according to its business requirements.

Managing Promotions Deductions

Karl Mann, the key account manager for a food and beverage manufacturer, is setting up a promotion to feature your company's line of gourmet coffee products at a chain of grocery stores. The promotion includes a provision to reimburse the grocery chain for the cost of purchasing newspaper advertisements and creating signs to publicize a sale on your coffee line. Rather than authorize a payment to cover the advertising and sign expenses, Karl arranges for the grocery chain to deduct those costs from the next invoice it receives from your company.

Next, Karl opens the Siebel Consumer Sector application to preauthorize the deduction. He selects the plan he created for fall promotions at the grocery chain and adds a new record for the gourmet coffee promotion. After entering relevant information about the promotion, he enters the names of the four gourmet coffee products and allocates funds for each individual product. He allocates $2,500 as the cost of promoting one product (one-fourth of the total promotion cost). Within the fund allocation record of each coffee product, he preauthorizes the deduction.

One month later, the grocery chain returns its payment for a $45,000 invoice from your company. It sends your company a check for $35,000, along with a debit memo referencing the deduction. The accounts receivable department notes the $10,000 discrepancy, and passes the information to the marketing administrator.

The marketing administrator creates a deduction record in the Siebel Consumer Sector application, and attaches the debit memo to the deduction record, along with a fact sheet about the corporate promotion. Although the marketing administrator also assigns the deduction to Karl Mann, the entire account team has visibility to the deduction.

The next day Karl brings up the list of deductions for the accounts he manages, and sees the new deduction record. Since he preauthorized the deduction when he allocated promotion funds, the allocated funds are available to resolve the deduction.

Karl researches the deduction, including verifying the terms of the promotion on the fact sheet attached, and resolves the deduction by applying the fund allocation to cover the $10,000.

Managing HQ Deductions

A customer of a food and beverage manufacturing company submits a check for $25,000 for last month's billing. However, their invoice was for $45,250. Since the company has integrated back office software with their Siebel Consumer Sector application, data passes through from the Accounting department creating a $20,250 deduction for the account.

The marketing administrator reviews the debit memo from the customer, forwarded by Accounting, and discovers that the $20,000 deduction covers both a $10,000 trade promotion deduction, and $10,250 deducted for unsaleable goods. The marketing administrator splits the original deduction record, and assigns the promotion-related deduction to key account manager Karl Mann, and the unsaleable goods deduction to customer financial services representative, Laura Hoover. To the unsaleable goods deduction, the marketing administrator attaches the customer's debit memo and a bill of lading.

To see how Karl Mann resolves the promotion-related deduction, see "Managing Promotions Deductions" on page 220.

The next morning, Laura Hoover checks for open deductions assigned to her and finds the deduction of $10,250 for unsaleable goods. She notes that the account also had a deduction of $10,000 for a promotion, and that Karl is resolving that part of the original deduction.

Laura reviews the literature attached to the deduction, then calls Karl. She finds that he has already agreed to refund $5,000 for goods that arrived in damaged condition. However, that leaves $5,250 outstanding. Laura calls her contact at the customer site, and finds that their Accounting department mistakenly took the damaged goods deduction twice before sending payment. The remaining $250 has been in dispute for some time over a late shipment.

Laura applies a $5,000 credit memo to the deduction to cover the damaged goods. She issues a $5,000 chargeback to the account to recover the amount mistakenly deducted by the customer's Accounting department. Finally, since she has the authority to do so, she resolves the remaining deduction amount by writing off the disputed $250, in the interest of good will with the customer.

Example Workflow for Deductions

This is an example workflow performed by marketing administrators, customer financial service representatives, and key account managers. Your company may follow a different workflow, according to its business requirements.

Administrator Procedures

To manage deductions, Siebel application administrators, marketing administrators, customer financial service representative managers, or other personnel with administrative privileges complete the following tasks.

1 **Add or edit deductions.** Administrators may need to add deduction records if the deduction fields are not automatically populated through integration with your company's back office software. For more information, see "Adding and Editing Deductions" on page 224.

2 **Optional: Split deductions.** Administrators can split deductions into two separate deductions while retaining the original deduction record. For more information, see "Splitting Deductions" on page 226.

3 **Optional: Add or modify invoices.** Administrators may need to add invoices to deduction records if invoice fields are not automatically populated through integration with your company's back office software. For more information, see "Associating and Modifying Invoices" on page 233.

4 **Optional: Add or modify credit memos.** For more information, see "Creating Credit Memos" on page 228.

5 **Optional: Create Activity plan templates.** For more information, see *Applications Administration Guide*.

End-User Procedures

To resolve deductions, key account managers, customer financial service representatives, and customer financial services managers complete the following tasks:

1 **Optional: Preauthorize deductions.** Key account managers can give customers prior approval to take deductions. For more information, see "Preauthorizing Deductions" on page 231.

2 **Review deductions.** For more information, see "Reviewing Deductions" on page 232.

3 **Optional: View account deductions.** For more information, see "Viewing Account Deductions" on page 233.

4 **Optional: Create deduction activities.** For more information, see "Creating Deduction Activities" on page 234.

5 **Optional: Create deduction activity plans.** For more information, see "Creating Deduction Activity Plans" on page 235.

6 **Optional: Associate invoices with deductions.** For more information, see "Associating and Modifying Invoices" on page 233.

7 **Optional: Add or view attachments to deductions.** For more information, see "Creating Deduction Attachments" on page 235.

8 **Optional: Create deduction notes.** For more information, see "Creating Deduction Notes" on page 236.

9 **Optional: Review account credit memos.** For more information, see "Reviewing Account Credit Memos" on page 236.

10 **Resolve deductions.** For more information, see "Resolving Deductions" on page 237.

11 **Optional: Analyze deductions.** End users can view charts to analyze and account's deductions. For more information, see "Analyzing Deductions" on page 240.

12 **Optional: Analyze representative workload.** This procedure is usually performed by managers, and this view is typically not visible to end users. However, the standard product configuration makes this chart available to an end user. For more information, see "Analyzing Workloads" on page 229.

Administrator Procedures

This section provides instructions for the following procedures:

- To add or edit deduction records

- To add literature to a deduction on page 226

- To split deductions on page 227

- To add or modify credit memos from the Credit Memo Administration view on page 228

- To analyze deductions workloads on page 229

Adding and Editing Deductions

The procedure for resolving deductions begins by creating a detailed deduction record.

To add or edit deduction records

1 From the application-level menu, choose View > Site Map > Data Administration > Deductions.

2 Add a record, or query to find the record you need to edit and select it.

3 Fill in or edit the fields as required. Some fields are described in Table 35.

Table 35.   Select Fields in Deduction Records

Field	Comments
Account	The account that submitted the deduction.
Account Team	This field is automatically populated with the members of the account team when a deduction is created for that account, if a team has previously been created for that account. Deductions are visible to all account team members, and can be resolved by all account team members.
Amount	The amount the customer deducted from the invoice total.

Table 35.   Select Fields in Deduction Records

Field	Comments
Assigned To	The individual employee to which the deduction is assigned. However, the deduction is visible to all account team members.
Chargeback	The amount of the deduction you reject. The amount you enter in this field can be less than, or equal to, the Deduction Amount, but it cannot exceed the Deduction Amount.
Credit Memo	Sum of amounts resolved in deduction Credit Memo.
Debit memo	Debit memos are documents from the customer explaining why they are not sending the total invoice payment. The number is entered manually into the deductions record.
Deduction ID	A unique number or code that identifies a deduction.
New	A mark in this column indicates that this is a new deduction record, and is visible to the entire account team.
Parent Id	The Deduction Id of the original deduction. This field is populated in child deduction records created as the result of a deduction split.
Priority	The level of urgency with which the deduction should be resolved. The values are Very High, High, Medium, and Low.
Reason	The reason given for the deduction. The list of reasons is dynamically determined by the Type value.
Status	Indicates the current status of a deduction. The values are: ■ **Open.** No part or the deduction has been resolved ■ **In Progress.** A portion of the deduction has been resolved ■ **Closed.** The deduction is completely resolved ■ **Inactive.** The original deduction record has been split into two deduction records and is no longer active.
Status Date	The date the status last changed.
Total Remaining	The amount of the deduction that still needs to be resolved.
Total Resolved	Sum of trade funds, credit memos, write-offs, and chargebacks.

Administrator Procedures

Table 35.   Select Fields in Deduction Records

Field	Comments
Trade Amount	Sum of amounts resolved by Payments for promotion-related deductions in the Resolution tab.
Type	Types of deductions.

Adding Literature to Deductions

Only administrators can add literature to deduction records. Examples of literature include:

■ Bills of lading

■ Debit memos

■ Fact sheets about corporate promotions

■ Pick tickets

■ Remittances

■ Customer correspondence

To add literature to a deduction

1 From the application-level menu, choose View > Site Map > Data Administration > Deductions and select the appropriate deduction record.

2 Click on the Literature view tab and add the literature.

Splitting Deductions

Customers occasionally combine different types of deductions. For example, a buyer who runs a trade promotion and also receives broken merchandise in a shipment may combine the costs of the promotion and the broken merchandise into one deduction. To properly account for the two different deduction types, you need to split the original deduction into two separate deductions.

When you split a deduction record into two separate deduction records, the original deduction record is retained, but its status is changed to inactive. The system-generated ID of the original deduction will appear in the split record's Parent ID field.

NOTE: You can only split deductions where the status is Open.

To split deductions

1 From the application-level menu, choose View > Site Map > Data Administration > Deductions.

2 Click the Split view tab.

Two new records appear in the Deduction Split list.

3 In the Deductions list, select the appropriate record, and click Split.

Two new records appear in the Deduction Split list.

4 In the Split list, select one of the new deduction records, and fill in the fields in the Split Deductions form as required. Be sure to adjust the Amount fields to reflect the value of the split deductions.

5 Repeat Step 4 for the second new deduction record.

Creating Credit Memos

Administrators can add or modify credit memos, and view the method used to credit buyers, either deduction, check, EFT, or cash.

To add or modify credit memos from the Credit Memo Administration view

1 Navigate to View > Site Map > Data Administration > Credit Memos.

The Account Credit Memo Administration view appears.

2 In the Account form, query for the appropriate account using standard procedures.

Credit memos associated with the selected account appear in the Credit Memos list.

3 In the Credit Memos list, select a record to edit, or add a new record and fill in the required fields.

Some of the fields in the Credit Memos list are described in Table 36.

Table 36. Some Fields in the Credit Memos List

Field	Comments
Credit ID	A system-generated number identifying the credit memo.
Type	Type of credit memo. May include: ■ **Invoicing.** Errors made on the invoice ■ **Unsaleable.** Goods arrived expired or spoiled ■ **Returns.** Goods returned for any reason other than unsaleable ■ **Transportation.** Late delivery LOV Type: CREDIT_MEMO_TYPE
Invoice Id	A unique number used to reference the invoice record. The picklist in this field can be used to associate preexisting invoices to the credit memo.
Amount	The amount of the credit memo.

Analyzing Workloads

Administrators and managers can analyze the deduction resolution workloads between employees. Although this chart is accessed through the end-user views, it is generally not made visible to end users.

To analyze deductions workloads

1 Navigate to the Deductions screen.

2 From the Show drop-down list, select the appropriate filter.

3 In the Deductions list, query for the appropriate records and select all the deductions you want to analyze

4 Click the Chart view tab.

5 From the drop-down list, choose the type of chart you want to view.

In the standard Siebel Consumer Sector application, the chart selections are Aging Analysis, Status and Priority Analysis, Account and Type Analysis, and Rep Workload Analysis.

End-User Procedures

This section provides instructions for the following procedures:

Preauthorizing Deductions

Key account managers (KAMs) can arrange with their customers to take deductions as reimbursement for promoting your company's products, and KAMs can preauthorize these deductions. Preauthorizing the use of trade funds to pay for deductions reduces the time spent resolving deductions.

To preauthorize a deduction

1 Navigate to the Promotions screen.

The Account Promotions list appears.

2 From the Account Promotions list select the appropriate promotion name.

> **NOTE:** If the promotion does not exist, you can create one. For more information, see Chapter 7, "Trade Promotions."

3 Click the Deals view tab.

4 In the Deals list, select the appropriate deal.

If the deal does not yet exist, and you have privileges to do so, you can create a new deal. For information on creating deals, see "Creating Deals for Promotions" on page 177.

5 In the Deals list, click in the Deductions field to place a check mark in the box.

When you step off the field, the check mark will be replaced with a Y.

> **NOTE:** You can also create deals at the Promoted Product level and preauthorize them for deduction in the Promotion Fund Allocations view. For more information, see Chapter 7, "Trade Promotions."

> **NOTE:** Fields in the Promotions > Deal > Payment tab are populated when the deduction is resolved by payment through the Deductions > Resolution view.

Reviewing Deductions

End users can review, query, sort and reassign all deductions assigned to them or to the account team.

To review deductions

1 Navigate to the Deductions screen.

2 From the Show drop-down list, select one of the filters:

- ■ **My Deductions.** Displays all deductions for accounts to which the user is an assigned team member (primary or not).

- ■ **My Team's Deductions.** This view is visible only to users with direct reports, for example, a customer financial services manager. If the manager's direct reports (or their subordinates) have deductions assigned to them, these deductions are displayed here.

- ■ **All Deductions.** Displays all deductions within the user's organization.

- ■ **All Deductions Across Organizations.** Displays all deductions across all organizations within the Siebel database.

3 Select a deduction record, and choose any of the available view tabs to review or add details to the deduction.

NOTE: Only users with administrator privileges can attach literature to a deduction using the literature view tab.

Viewing Account Deductions

Key account managers can review information about all deductions taken by an account. By selecting different accounts, key account managers can view and compare the deductions taken by different accounts.

To view deductions for an account

1 Navigate to the Accounts screen, and from the Accounts list select the appropriate account.

2 Click the Deductions view tab.

The Deductions list displays all the deductions associated with that account.

Associating and Modifying Invoices

Invoices can be imported from your company's back office system, or manually created by an administrator. End users can associate existing invoices to a deduction and edit existing invoice information.

To associate or modify invoices

1 Navigate to the Deductions screen and select the appropriate deduction.

2 Click on the Invoices view tab, and add a new record.

3 Complete the fields as required.

NOTE: Marketing administrators and other managers or administrators can view all invoice records and create invoices in the View > Site Map > Invoices > All Invoices view if invoice fields are not automatically populated. For more information on creating invoices, see *Siebel Field Service Guide*.

Creating Deduction Activities

Key account managers and customer financial services representatives and managers can view and create activities related to deductions. For example, a customer financial services representative receives a deduction for an invoice pricing error. The customer financial services representative creates an activity for the orders department to verify the invoicing error. An employee in the orders department completes the activity. When the activity has been completed, the customer financial services representative can resolve the deduction.

To create deduction activities

1 Navigate to the Deductions screen, and select a deduction record.

2 Click the Activities tab, add a new record, and fill in the fields as required.

Some of the fields on the Activities tab are described in Table 37.

Table 37. Some Fields on the Activities Tab

Field	Comments
Created	Date and time the activity is created.
Type	Classification of the activity. LOV Type: TODO_TYPE
Description	Description of the activity.
Due	Date due.
Assigned To	Individual responsible for the activity.
Priority	High, Medium or Low. LOV Type: DEDUCTION_PRIORITY
Status	Status of the activity. LOV Type: EVENT_STATUS

Creating Deduction Activity Plans

An activity plan is a group of predetermined activities that embody the policies, procedures, and best practices for managing deductions. Customer financial services managers, key account managers, and customer financial services representatives can create activity plans by selecting from predefined templates.

To create deduction activity plans

1 Navigate to the Deductions screen, and select a deduction record.

2 Click the Activity Plans tab, add a record, and complete the fields as required.

Click the down arrow in the Template field to select a template that includes all the predefined activities recommended for resolving this type of deduction.

Creating Deduction Attachments

Employees in the customer financial services department and key account managers can view and attach documents to deductions.

To create deduction attachments

1 Navigate to the Deductions screen, and select a deduction record.

2 Click the Attachments tab, add a new record, and complete the fields as required.

Creating Deduction Notes

Customer financial services representatives, key account managers, and customer financial services managers can read and add notes to deduction records.

NOTE: *Shared* notes are visible to all users who have visibility to the deduction. *Private* notes are visible only to the creator of the note.

To create deduction notes

1 Navigate to the Deductions screen and select a deduction record.

2 Click the Notes view tab and add a record.

3 From the Show drop-down filter select Public or Private Notes.

Reviewing Account Credit Memos

Customer financial services representatives can review all credit memos issued to a an account and payments issued against credit memos.

To review account credit memos

1 Navigate to the Accounts screen and in the Accounts list select the account for which you want to review credit memos.

2 Click the Credit Memo view tab.

3 In the Credit Memo list, select the credit memo for which you want to view payments.

Details about the credit memo appear in the form. Payments made against the selected credit memo appear in the Payments list.

Resolving Deductions

When key account managers and customer financial services representatives finish researching a deduction, they choose from different methods for resolving deductions. The methods available for resolving deductions depend on the deduction type, either Promotion or HQ.

The steps the user takes to resolve the deduction are reflected in the Totals row at the bottom of the Deduction Resolution list view, and in summary fields of the Deductions form. With each fund payment, credit memo, chargeback, or write-off submitted, the figures displayed in the respective summary fields and the Total Resolved field are updated, and the figure in the Remaining field is reduced. To completely resolve the deduction, the amount in the Total Remaining field must be reduced to $0.00.

Resolving Promotion Deductions

For deductions of type Promotion, any combination of the following methods can be used:

■ Applying trade funds

■ Writing off all or part of a deduction

■ Issuing chargebacks

To resolve Promotion deductions

1 Navigate to the Deductions screen, and select the deduction record to resolve.

2 Click the Resolutions view tab, or drill down on the Deduction ID field.

3 Apply trade funds, if appropriate.

   a Select the Payments filter from the Show drop-down list, and add a new record.

   b Click the select button in the Deal ID field, and select a deal from the Deal picklist. Click the Edit button to edit the record. Enter the payment amount you are approving in the New Payment field, and click Save to save the new payment amount. Click OK to leave the Pick Allocation dialog box.

     A new payment record is generated.

     NOTE: To determine the activity against deals, refer to the Estimate Amount, Payments Paid, Payments Submitted, and Payments Pending fields in the Pick Allocation dialog box.

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   c Repeat Step a on page 238 through Step b for each payment you want to create for the deduction.

   d Submit payments:

     ❑ Click Submit to submit an individual payment record.

     ❑ From the menu, choose Submit All to submit all payments records in the Payments list.

4 Write off all or part of a deduction, if appropriate.

   a Select the Write Off filter from the Show drop-down list, add a new record, and complete the fields as required.

   b Click Submit or choose Submit All from the menu.

5 To reject part or all of the deduction, issue a chargeback.

   a Select the Chargeback filter from the Show drop-down list, add a new record, and complete the fields as required.

   b Click Submit or Submit All.

     The information you entered can be exported to your company's back office information system. A member of the accounts receivable department can use this information to write a letter to the customer requesting payment of the chargeback amount.

Resolving HQ Deductions

For deductions of type HQ, one or many of the following methods can be used:

- Applying credit memos

- Writing off all or part of a deduction

- Issuing chargebacks

To resolve HQ deductions

1 Navigate to the Deductions screen, and select the deduction record to resolve.

2 Click the Resolutions view tab.

3 Apply a Credit Memo, if appropriate.

    a Select the Credit Memo filter from the Show drop-down list, and click New to add a record.

    b Click the down arrow in the Credit Memo Id field, and select a credit memo. Click the Edit button to edit the record. Enter an amount in the New Amount field, and click Save to save the new amount. Click OK to leave the Pick Allocation dialog box.

    c Click Submit or choose Submit All from the menu.

4 Write off all or part of a deduction, if appropriate.

    a Select the Write Off filter from the Show drop-down list, add a new record, and complete the fields as required.

    b Click Submit or choose Submit All from the menu.

5 To reject part or all of the deduction, issue a chargeback:

    a Select the Chargeback filter from the Show drop-down list, add a new record, and complete the fields as required.

    b Click Submit or choose Submit All from the menu.

    The information you entered can be exported to your company's back office information system. A member of the accounts receivable department can use this information to write a letter to the customer requesting payment of the chargeback amount.

Analyzing Deductions

Key account managers, customer financial services representatives, and their managers can use various chart views to analyze deductions for an account.

To analyze an account's deductions

1 Navigate to the Deductions screen and perform a query for the account you need to analyze.

2 Click the Chart view tab.

3 Use the drop-down list to select the type of chart you wish to view.

Available charts include Deduction Aging Analysis, Deduction Status and Priority, and Deduction Account and Type Analysis.

Objectives $\mathbf{10}$

This chapter describes the procedures needed to:

■ Enter and update information about Objectives

■ Add and target Activities to Objectives

■ Schedule store visits

■ Check and change the status of Objectives and Activities

About Objectives

An objective is a sales goal established to introduce a new product, promote the sale of an existing product, or improve the presence a product has in the retail environment. It is applied to one or more retail store accounts and includes one or more recommended activities to be performed by salespersons as they visit the stores belonging to the target accounts to which the objective is applied.

Organizations often create objectives to support a corporate promotion or merchandising strategy. When used with recommended activities, objectives help to coordinate your sales force. Salespersons benefit by being aware of objectives that are targeted at their retail stores and what their managers consider important activities to perform during their store visits.

Ideally, objectives should be implemented at the beginning of a planning cycle.

Objectives can be created for the entire corporation, for instance, to support a corporate promotion. In this case, the corporate objective will be the parent objective, and regional, district, or key account managers can create child objectives of this parent to support the goals of the corporate objective.

Alternatively, a retail sales manager can create an objective and activities specifically for the retail sales representatives in the region, to support sales goals specifically for that region.

For physical and logical entity relationship diagrams on Objectives, please see *Data Model Reference for Industry Applications* and *Interface Tables Reference for Industry Applications*.

Business Scenario for Objectives

This scenario is an example of a workflow performed by a retail sales manager and sales representatives to create and fulfill sales objectives. Your company may follow a different workflow according to its business needs.

Your company, a large food manufacturer, has developed a new beverage, and plans to test its consumer appeal by introducing it in southern France. One retail sales manager's territory is the town of Toulon, which is in the southern region of France. The sales manager is responsible for making sure that the sales representatives reporting to her take the actions necessary to have a successful launch of this new beverage.

The retail sales manager begins by creating an objective named Southern France New Beverage Launch. Next, she adds three recommended activities that she wants each member of her sales force to carry out to meet this objective:

■ Meet with a manager to make sure the new beverage is priced properly

■ Take a retail order to make sure there is enough new beverage in stock

■ Perform a retail audit to verify the new beverage is correctly positioned on store shelves

To communicate the importance of these activities to her sales force, she assigns the priority "1-ASAP" to all three recommended activities. She also adds a product fact sheet to the objective as a literature item. Her sales representatives can use this fact sheet to gain valuable information about the new beverage prior to visiting accounts. Finally, she adds every account in southern France to the objective, adds each sales representative as an objective team member, and schedules a sales representative to visit each account.

As the sales representatives for southern France check their calendars, they will see that the retail sales manager has scheduled a series of store visits for them to complete. As they prepare for each of these visits, they can review the objective and the recommended activities she has created and the product fact sheet she added. Later, as the new beverage launch is in progress and the sales representatives are performing store visits, the manager or sales representatives can review the objective and note whether its related recommended activities have been completed.

Example Workflow for Objectives

This is an example workflow for working with Objectives. Your company may follow a different workflow according to its business requirements.

Administrator Setup Procedures

Administrators must perform the following steps in the order given:

1 **Create an Objective.** For more information, see "Creating an Objective" on page 246.

2 **Add recommended activities.** For more information, see "Adding Recommended Activities to an Objective" on page 248.

3 **Target accounts to the Objective.** For more information, see "Targeting Accounts to an Objective" on page 249.

4 **Optional: Add literature to an Objective.** You can add supporting literature, such as marketing and sales documents, to an objective, using the Attachments view tab. For more information, see *Fundamentals*.

   NOTE: For users to view a literature item, they need to have software capable of opening the literature item file installed on their computers. For example, they must have Adobe Acrobat Reader to view a .pdf file.

5 **Optional: Associate promotions with an Objective.** Objectives provide goals for retail sales representatives working with promotions. For more information, see Chapter 7, "Trade Promotions."

6 **Optional: Change dates for the Objective.** For more information, see "Changing the Dates for Objectives" on page 250.

7 **Optional: Add child objectives.** You can associate smaller objectives with a larger objective. The associated products of the child objective are constrained by the parent objective. For more information, see "Adding Child Objectives" on page 250.

8 **Schedule store visits.** For more information, see "Scheduling Store Visits" on page 251.

End-User Procedures

End users will use the Objectives screen to review objectives, recommended activities, target accounts, and literature.

1 **Review Objectives.** For more information, see "Reviewing Objectives" on page 252.

2 **Perform recommended activities.** For more information, see Chapter 12, "Retail Execution."

3 **Optional: Change Status of Activities.** For more information, see "Changing the Status of Activities" on page 253.

Administrator and End User Maintenance Procedures

During the campaign, retail sales managers and sales representatives check on the status of the objectives and associated activities.

■ **Check status of Objectives.** For more information, see "Checking the Status of Objectives" on page 254.

Administrator Procedures

This section provides instructions for the following procedures:

■ To create an objective

■ To add recommended activities to an objective on page 248

■ To target an account to an objective on page 249

■ To add a child objective on page 250

■ To change the dates for an objective on page 250

■ To schedule a store visit on page 251

These tasks are typically performed by Retail Sales Managers or Marketing Administrators, although some companies choose to allow sales representative to create their own objectives. To create an objective and use it to schedule store visits, complete the procedures described in the following sections.

NOTE: As in all Siebel applications, the availability of certain views and functionality can be limited according to each user's responsibilities; therefore, the views mentioned here may vary from those on your screen. Generally, an administrator has responsibility for updating user privileges.

Creating an Objective

You must complete this task before performing the remaining tasks in this chapter.

To create an objective

1 From the application-level menu, choose View > Site Map > Data Administration > Objectives.

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

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

Field	Comments
End Date	The ending date of an objective. It must fall within the objective's time period.
Objective	The name of the objective.
Description	The purpose of the objective.
Type	The type of objective being created; for example, a promotion or a marketing type of objective. Selecting the type of objective does not drive any other functionality within the product.
	LOV Type: SOURCE_TYPE
Parent Objective	The name of an objective's parent objective, if applicable. The parent objective defines some of the criteria for all of its child objectives. for instance, child objectives are constrained to the products associated with the parent objective, if any.
	You can create parent objectives without completing the Parent Objective field. You *must* complete the Parent Objective field when creating child objectives.
	Parent-child relationships between Objectives can be viewed in the Objectives Explorer view.
Period	The period of time during which an objective must be completed.
Start Date	The beginning date of an objective. It must fall within the objective's time period.
Organization	The organization will constrain the target accounts that will be available to associate to the objective.
Team	Multiple people can be assigned to the Objective's team, and any user with the ability to create objectives can assign objective team members.

If you wish to create recurring objectives, you can:

■ Change the period of an existing objective (if no visits have been scheduled).

■ Copy an existing objective and apply a new period to it.

■ Use Workflow to schedule monthly visits. For more information, see *Siebel Business Process Designer Administration Guide.*

Adding Recommended Activities to an Objective

You can add one or more recommended activities to an objective. Recommended activities:

■ Will be associated with every target account added to the objective

■ Are not assigned to individuals, since they will be used when planning visits to all of the targeted accounts

■ Can optionally be associated with individual products, if certain activities apply to specific products

To add recommended activities to an objective

1 From the application-level menu, choose View > Site Map > Data Administration > Objectives.

2 In the Objectives list, select the objective to which you want to add an activity.

3 Click the Activities view tab, add a record to the Activities list, and complete the necessary fields.

Some of the fields in the Activities view are described in Table 38.

Table 38.   Some Fields in the Activities View

Fields	Comments
Activity Type	The type of activity to be performed; for example, a retail assessment or presentation.
Planned Start	The suggested date the recommended activity begins; the default is the objective period start date. If you choose to edit it, the date must fall within the period assigned to the parent objective.
Planned Completion	The suggested date the recommended activity ends; the default is the objective period end date. If you choose to edit it, the date must come after the planned start date for the recommended activity, and must fall within the period assigned to the parent objective.

Table 38.   Some Fields in the Activities View

Fields	Comments
Products	Each activity can have one or more products associated with it. The choice of products is restricted to products that are already associated with the objective.
Assessment Template	The name of the assessment template assigned to the recommended activity. If the recommended activity requires an assessment to be carried out, the relevant assessment template can be associated with the recommended activity. For information on assessment templates, see *Applications Administration Guide*.

Targeting Accounts to an Objective

You can apply one or more target accounts to objectives. The target accounts that will be available are those that belong to the organization of which the user is an account team member.

NOTE: The Account Targeting module is designed for end users, such as retail sales representatives, who have local data access and are not continuously connected to a network. For more information, see Chapter 13, "Account Targeting."

To target an account to an objective

1 From the application-level menu, choose View > Site Map > Data Administration > Objectives.

2 In the Objectives list, select the objective to which you want to add a target account.

3 Click Target Accounts view tab, add a record and complete the necessary fields.

Adding Child Objectives

You can associate smaller objectives with a larger objective. The associated products of the child objective are constrained by the parent objective.

To add a child objective

1 From the application-level menu, choose View > Site Map > Data Administration > Objectives.

2 Select the appropriate objective in the Objectives list, and click in the Parent Objective field, and select an objective to be the parent.

Changing the Dates for Objectives

During the planning stages for an objective, you can change its start date and end date. Date changes that you make to an objective can be applied to its recommended activities by changing the dates for each activity manually. You can also apply date changes that you make to an objective to its recommended activities by using the Apply Period button in the Objectives view.

To change the dates for an objective

1 From the application-level menu, choose View > Site Map > Data Administration > Objectives.

2 Select the Objective for which you want to change the start date or end date.

3 Select a new start date or end date for the objective by using one of the following methods.

- Click the calendar button in the Start Date or End Date field and select a new start date or end date for the objective.

- Click the select button in the Period field and select a new time period for the objective. The start date and end date are automatically set to the first and last dates in the period.

The Start and End Dates must fall within the date period of the parent objective.

4 Click the Apply Period button.

The Planned Start and Planned Completion dates of all recommended activities for the objective are reset to the planned start and planned completion dates of the objective.

Scheduling Store Visits

After completing the preceding tasks, you can schedule store visits for each account that has been added to the objective. There are three ways of scheduling store visits in Consumer Sector applications. Each of these ways makes use of a different feature. The first two features are discussed in other chapters of this guide.

■ If you are using the Routes feature, see "Using a Route to Schedule Visits" on page 270.

■ If you are using the Retail Execution feature, see "Scheduling Retail Visits" on page 277.

■ If you are not using the Retail Execution or Routes features, see "To schedule a store visit" on page 251.

To schedule a store visit

1 From the application-level menu, choose View > Site Map > Data Administration > Objectives.

2 In the Objectives list, select the objective for which you wish to schedule visits.

3 Click the Target Accounts view tab.

4 In the Objective form, click the Schedule button.

A store visit is created for the sales representatives assigned to each account included in the objective.

End-User Procedures

This section provides instructions for the following procedures:

■ To review objectives

■ To change the status of activities associated with an objective on page 253

In general, retail sales representatives do not create objectives, but instead use objectives to direct the activities they perform during customer visits. Retail sales representatives will use the Objectives screen to review objectives, recommended activities, target accounts, and literature that apply to the retail stores and accounts they call on.

For details on how retail sales representative use the retail execution feature to carry out recommended activities, see Chapter 12, "Retail Execution."

Reviewing Objectives

When end users navigate to the Objectives screen, the default filter used on the Objectives list is My Objectives.

The remaining view tabs and fields visible to the end users in the Objectives screen of the standard Consumer Sector product are identical to those available to the administrator.

To review objectives

1 Navigate to the Objectives screen or to Objectives > Explorer view.

2 The default filter used on the Objectives view, and the additional filters available, depends on the end user's responsibilities.

3 From the Show drop-down list, select the appropriate filter:

■ **My Objectives:** Objectives for which the user is assigned to the team.

■ **My Team's Objectives:** All Objectives within a manager's team, including their own.

■ **All Objectives:** All Objectives for the user's organization.

■ **All Objectives Across Organizations:** All Objectives across all organizations within the Siebel implementation.

4 Use the view tabs to review recommended activities, target accounts, and other information about the objectives.

For more information about navigating the standard Siebel interface, including using the Explorer tree, see *Fundamentals*.

Changing the Status of Activities

After performing the recommended activities, you can change the status of activities as follows.

To change the status of activities associated with an objective

1 From the application-level menu, choose View > Site Map > Accounts.

2 In the Accounts list, select an account.

3 Click the Outlet Visits view tab.

4 In the Outlet Visits list, select a visit by clicking on the hyperlink in the Description field.

5 In the Activities list, change the Status field of the activity.

NOTE: You can view the status of Accounts by choosing Objectives > Account Status > Recommended Activities. This view is read-only; you cannot change an activity's status in this view.

Administrator and End-User Maintenance Procedures

During the campaign, retail sales managers and sales representatives check on the status of the objectives and associated activities.

This section provides instructions for the following procedures:

■ To check the status of an objective

■ To check the status of an objective using charts

Checking the Status of Objectives

You can use the Account Status view or a graphical Chart to check objectives and the status of their recommended activities.

To check the status of an objective

1 Navigate to the Objectives screen.

2 Select the objective whose status you want to review.

3 Click the Account Status view tab.

4 Select the account whose status you want to review.

The recommended activities associated with the account are displayed in the Recommended Activities subview. You can check the status of each recommended activity.

To check the status of an objective using charts

1 Navigate to the Objectives screen.

2 Select the objective whose status you want to review.

3 Click the Charts view tab.

4 Choose from the charts available using the Charts view Show drop-down list.

Information for Configurators of Objectives

This section contains information that may be useful to configurators making changes this module.

The procedures documented in this chapter include buttons that invoke specialized methods, as described in Table 39.

Table 39.   Buttons and Methods for Objectives Configurators

Button	Name of Method	Description	Supported On
Commit	CommitAccnt	Writes account names from temporary targeting tables to permanent tables where objectives are stored.	Applet Layer
Intersection	ButtonIntersection	Intersection of lists	Applet Layer
Union	ButtonUnion	Union of lists	Applet Layer
Schedule - Target Accounts view	ShowPopup	Brings up a dialog box for sales representative and start date.	Bus Comp Layer
	OK	Creates an activity for the sales person to visit all accounts specified as route accounts	

Information for Configurators of Objectives

Routes 11

Retail sales managers can create routes and schedule visits for the sales representatives that they manage. This chapter describes how to organize retail accounts into routes, use routes to schedule visits, and maintain routes that frequently change.

About Routes

Routes are used to schedule visits to groups of retail accounts that are visited regularly, and on the same day or series of days, by a retail sales representative. You can also schedule non-routine visits to accounts by assigning target lists created in Account Targeting. A route specifies the order in which the accounts are visited and the starting time for each visit. By arranging a group of accounts into an efficient route, you can make sure that retail sales representatives minimize the amount of time spent traveling between accounts.

After it has been created, a route can be used repeatedly to schedule store visits to the accounts in the route. You can also create routes to schedule store visits for a specific period of time, such as in support of a promotion, campaign, or objective. You can use views in either the Routes screen or the Calendar screen to schedule these visits.

Business Scenarios for Routes

These scenarios are examples of a workflow performed by retail sales managers and retail sales representatives. Your company may follow different workflows according to its business requirements.

The first business scenario presented here illustrates how retail sales representatives can use the Routes views to organize retail accounts into routes and use routes to schedule visits. The second business scenario illustrates how retail sales managers can create routes and schedule visits for the retail sales representatives they manage. The third business scenario demonstrates how retail sales managers and retail sales representatives can create and manage routes that change frequently.

Creating Routes for Retail Sales Representatives

A retail sales representative for a large beverage manufacturer has a sales territory covering a large section of central Virginia. She is responsible for visiting each of the large grocery stores in her territory once a month. Most of her accounts are in Richmond, a large metropolitan city. However, she is also responsible for visiting grocery stores in several small cities throughout central Virginia. Because she always visits the same accounts, in the same order, she decides to organize her accounts into efficient routes that she will use each month to schedule her visits.

The retail sales representative begins by creating a series of routes for the accounts in the Richmond area. Each route covers a group of accounts from one geographical area, such as northeast Richmond, that can be visited in one day. Next, she creates a four-day route that includes all her accounts in the outlying portions of her sales territory. Day one of the route takes her to accounts in Danville and Pulaski. The following three days take her to accounts in Roanoke, Lynchburg, and Charlottesville.

After she finishes creating her routes, she uses them to schedule visits to all the accounts in her territory for the upcoming month. She specifies the date on which the route begins. Additional details, such as the starting time and duration of each visit, are determined by information she entered when she set up the route. Each month she will again use the routes that she has created to schedule account visits.

Retail Managers Creating Routes for Sales Representatives

A retail sales manager for the beverage manufacturer manages 12 retail sales representatives working in the Baltimore-Washington area of the eastern United States. One of his representatives, a new employee, is not familiar with the representative's territory, which includes several grocery stores and drugstores in the District of Columbia. The retail sales manager is familiar with this area, so he takes on the task of organizing the new representative's accounts into a series of efficient routes. Each route will cover one section of the District. The accounts in each route will need to be visited every two weeks. Therefore, he decides to create 10 routes—one for each workday in a two-week period. Each route includes six or seven stores in one neighborhood, such as Georgetown, and can be completed in one day.

When he finishes creating the routes, he uses them to schedule a month's worth of store visits for the new sales representative. The retail manager schedules the first route to begin on the first and third Mondays of the month, the second route to begin on the first and third Tuesdays of the month, and so forth, so that each route is scheduled to be completed twice during the month. The starting time and duration of each store visit are determined by information he entered when he set up the routes.

When the retail sales representative becomes familiar with the area, the retail manager gives the representative the task of maintaining that representative's own routes. The retail sales representative will have the ability to add new accounts to a route, change the order in which routes are visited, or adjust the starting times and durations of the visits.

Creating Routes that Change Frequently

A brand manager at the beverage manufacturer establishes a promotion that will run for the next two weeks. The retail sales manager for the beverage manufacturer reviews the promotion criteria to get an exact understanding of the target group of accounts, and concentrates on managing the retail execution with retail sales representatives. He sends an email message to his sales team detailing the criteria they should use when generating their account lists and telling them to schedule a new call cycle for the promotion.

One of the retail sales representatives who reports to the retail manager is sitting at home Sunday evening, planning for the next week. She receives the email message and decides to plan this into her route immediately. In her local database, she generates a target list using the Account Targeting module. When she has generated an optimal list of target accounts, she creates a new route and applies the target list to it. Finally, she schedules visits over the next two weeks for all of the accounts in the target list.

Example Workflow for Routes

This is an example workflow for planning routes. Your company may follow a different workflow according to its business requirements.

End User Procedures

Routes are typically either created by end users, such as retail sales representatives, or created by a retail sales manager and assigned to a retail sales representative. To create a route and use it to schedule store visits, complete the following tasks, in the order in which they are listed:

1 **Create a route.** You must specify the person for whom you are creating the route (generally, either retail sales manager or a retail sales representative who reports to one). For information on performing this procedure, see "Creating a Route" on page 263.

2 **Add accounts to a route.** As you add accounts, you add details such as the start time and duration for each visit to the account. However, you do not specify a start date, because the route can be used repeatedly to schedule visits. For information on performing this procedure, see "Adding Accounts to a Route" on page 265.

3 **Optional: Assign a target list to a route.** If you are using the Account Targeting feature to create target lists, you can assign them to a route. For information on performing this procedure, see "Assigning Target Lists to a Route" on page 267.

4 **Schedule visits.** When the route has been created, you can use it to schedule visits to every account in the route. For information on performing this procedure, see "Using a Route to Schedule Visits" on page 270.

NOTE: When creating and scheduling a route with a limited duration, such as in support of a promotion, you can perform all of the preceding steps in the Target Accounts view.

End-User Procedures

This section provides instructions for the following procedures:

■ To create a route on page 264

■ To add accounts to a route using the Route Accounts view on page 265

■ To add accounts to a route using the Route Explorer view on page 266

■ To merge a target list on page 267

■ To assign a target list to a route on page 269

■ To schedule visits from the My Routes view on page 270

■ To schedule visits from the Target Accounts view on page 270

Creating a Route

You must specify the person for whom you are creating the route (generally, either a retail sales manager or a retail sales representative who reports to a retail sales manager). A retail sales representative can be assigned many routes, but each route can be assigned to only one retail sales representative.

Adding, Modifying, or Deleting Routes

Routes are created to manage the scheduling of retail visits to accounts within a given geographical area. A route can have any number of accounts, but only one retail sales representative can be assigned to it. A route name cannot be used for more than one route assigned to a given retail sales representative. However, the same route name can be used for routes that are assigned to different retail sales representatives. If the route will be used repeatedly to schedule visits, do not specify a start date when creating the route.

To create a route

1 Navigate to the Routes screen.

2 In the Routes list, add a new record and complete the necessary fields.

Some of the fields in the Routes list are described in Table 40.

NOTE: In the My Routes view, the Salesperson field is automatically filled with the current user name. If you are assigning a route to someone other than yourself, enter that person's name in the Salesperson field.

Table 40.   Some Fields in the Routes List

Field	Comments
Route Id	A unique system-generated number assigned to the route.
Route Name	A user-defined name for the route, such as Northeast Richmond. A route name must be unique to the retail sales representative to which it is assigned.
Description	A description of the route.
Salesperson	The salesperson to whom the route is assigned. A route can be assigned only to one person.
Start Day	The day of the week on which the route is designated to begin. This is used only as reference information and does not prevent you from using the route to schedule visits starting on some other day of the week. LOV Type: DAY_NAME
Active	If there is a check mark in this box, the route is active and available for use in scheduling visits.
Last Updated	Automatically filled with the time and date the route was last changed.
Updated by	Automatically filled with the name of the user who last changed the route.

Adding Accounts to a Route

When you have established a route, you can add accounts to it. There is no limit to the number of accounts that can be assigned to one route. Two views are available for adding accounts to routes:

■ **Route Accounts.** Displays accounts in a list.

■ **Route Explorer.** Displays routes and accounts in a hierarchical format.

Separate procedures are provided in this section for using each of these views.

NOTE: When associating an account with a route, select only those accounts where the owner of the route is represented on the sales team. It is possible to pick any existing account in the database when associating an account with a route. There is no check to determine whether you or the owner of the route have access to the account. This is standard behavior; pick dialog boxes for Accounts are always unconstrained. When drilling into an account that is not accessible to you, an error message will appear, stating that you do not have the required access to view that account. This is especially relevant for Siebel Mobile Web Client users who can view only their own accounts on their local database.

To add accounts to a route using the Route Accounts view

1 Navigate to the Routes screen.

2 In the Routes list, select a route.

3 Click the Accounts view tab.

4 In the Accounts list, add a new record.

5 Click the Account select button.

The Pick Account dialog box appears.

6 Select an account and click OK.

Repeat Step 4 through Step 6 to add additional accounts.

7 Complete the necessary fields for each account you added.

Some fields in the Accounts List are described in Table 41.

Table 41. Selected Fields in the Accounts List

Field	Comments
Call Duration	The scheduled duration of the account visit. LOV Type: APPOINTMENT_DURATION
Call Time	The current time is automatically entered in this field. You should edit this field to reflect the time when the account is to be visited.
Offset Day	Allows you to create routes that span more than one day. It indicates the number of days after the beginning of the route that an account should be visited. For instance, if an account is to be visited on the first day of a route, this field should be set to 0. If the account is to be visited on the second day of a route, this field should be set to 1.
Last Call	Identifies the date and time of the most recent visit to this account.

To add accounts to a route using the Route Explorer view

1 Navigate to the Routes screen.

2 In the Routes list, select a route.

3 Click the Explorer view tab.

4 In the Routes explorer tree, click the plus sign (+) next to the folder of the route to which you want to add an account.

5 Click the plus sign (+) next to the Accounts folder displayed under the route.

A list of all the accounts assigned to the route you selected appears.

6 In the Accounts list, add a new record.

7 Click the Account select button.

8 In the Pick Account dialog box, select an account and click OK.

Repeat Step 6 through Step 8 for each account you want to add to the route.

9 Fill in the fields.

Some of the fields are described in Table 41.

Assigning Target Lists to a Route

NOTE: The Account Targeting module is designed for end users, such as retail sales representatives, who have local data access and are not continuously connected to a network. For more information, see Chapter , "Account Targeting."

On your local database, you can use account lists created with the Account Targeting feature. After creating and saving a target list, you can optimize the target list by merging (intersecting or combining) it with other target lists. When you have finished merging target lists, you can assign the results to a route in the view that you use to plan your routes. You can also add or delete accounts after assigning the list of accounts to a route.

NOTE: You must create and save a target list using the Account Targeting module before you can merge it with other target lists and assign the results to a route. For information on these procedures, see "Creating a Target List" on page 299 and "Saving a Target List" on page 302.

To merge a target list

1 Navigate to the Routes screen.

2 In the Routes list, select a route.

3 Click the Target Accounts view tab.

4 Click the Target Accounts list to activate it.

A blue line appears around the Target Accounts list.

5 In the toolbar, click the apply target list button, located in the row of buttons next to the History button.

The Targeting dialog box appears and displays the targeted routes.

6 Click to select one or more target lists (query name) you want to assign to the route; to deselect a target list, click it again.

7 If you selected more than one target list, use one of the following methods to merge the lists:

- Click the Intersection button to retrieve only those accounts common to *all* the selected target lists. For example, if List 1 contains A, B, and C, and List 2 contains B, C, and D, the resulting list will contain only B and C, which are common to both target lists.

- Click the Union button to retrieve all accounts from *all* the selected lists. For example, if List 1 contains A and B, and List 2 contains C and D, the resulting list will contain A, B, C, and D, the combination of both target lists.

NOTE: If only one target list is selected, the buttons are ignored.

8 Click OK.

9 In the toolbar, click the save target list button, located in the row of buttons next to the history button.

The Targeting dialog box appears with a blank Target Name field.

10 In the Target Name field, enter a unique name for the target list. Click Save.

The target list is saved. You can merge this list with other target lists to optimize your list of accounts.

11 Repeat Step 5 on page 268 through Step 10 on page 268 until you have optimized your target list. You are now ready to assign the target list to a route.

CAUTION: If you enter a name already in use, the previously saved target list will be overwritten without warning.

To assign a target list to a route

1 Navigate to the Routes screen.

2 In the Routes list, select a route.

3 Click the Target Accounts view tab.

4 In the Target Accounts list, merge target lists until you have an optimized list of accounts.

   NOTE: For information on merging target lists, see "To merge a target list" on page 267.

5 In the Target Accounts list, select the accounts that you want to add to a route.

6 Click the Commit button.

   The selected accounts are added to a route and appear in the Accounts list. When you are adding target accounts to an existing route, the target accounts will be added without duplicating accounts. If necessary, you can add or delete accounts from the Accounts list.

7 Fill in the fields for each account you added.

   Some fields in the Target Accounts list are described in Table 42.

Table 42.   Fields in the Target Accounts List

Field	Comments
Call Duration	The scheduled duration of the account visit. LOV Type: APPOINTMENT_DURATION
Call Time	The current time is automatically entered in this field. You should edit this field to reflect the time when the account is to be visited.
Offset Day	Allows you to create routes that span more than one day. It indicates the number of days after the beginning of the route that an account should be visited. For instance, if an account is to be visited on the first day of a route, this field should be set to 0. If the account is to be visited on the second day of a route, this field should be set to 1.

Using a Route to Schedule Visits

After you create a route, you can use it to schedule visits to all the accounts you added to the route. You can schedule route visits from a number of views. The following procedures show how to do this from the My Routes view, the Target Accounts view, and the Daily Calendar view.

To schedule visits from the My Routes view

1 Navigate to the Routes screen.

2 In the Routes list, select a route.

3 Click the More Info view tab.

4 In the More Info form, click the Schedule button.

   The Auto Schedule dialog box appears.

5 In the Start Date field, enter a date, and then click OK.

   In-Store Visit appointments for each account in the route are added to the calendar of the retail sales representative to whom the route is assigned. These appointments have no retail activities associated with them. For information on creating retail activities, see Chapter 10, "Objectives" and Chapter 12, "Retail Execution."

CAUTION: It is possible to schedule multiple appointments for the same time period when using the Routes views to schedule visits. Such scheduling conflicts do not trigger any sort of automatic notification. Retail sales representatives should check the Daily Calendar view for possible conflicts after routes have been added to their schedules. If scheduling conflicts exist, they should adjust the starting times of appointments or delete them as necessary to resolve the conflicts.

To schedule visits from the Target Accounts view

1 Navigate to the Routes screen.

2 In the Routes list, select a route.

3 Click the Target Accounts view tab.

4 In the Target Accounts list, assign a target list of accounts to the route.

> **NOTE:** For information on assigning a target list of accounts to a route, see "To assign a target list to a route" on page 269.

5 In the Target Accounts form, click the Schedule button.

The Auto Schedule dialog box appears.

6 In the Start Date field, enter a date and click OK.

In-Store Visit appointments for each account in the route are added to the calendar of the retail sales representative to whom the route is assigned. These appointments have no retail activities associated with them. For information on creating retail activities, see Chapter 10, "Objectives," and Chapter 12, "Retail Execution."

> **CAUTION:** It is possible to schedule multiple appointments for the same time period when using the Routes views to schedule visits. Such scheduling conflicts do not trigger any sort of automatic notification. Retail sales representatives should check the Daily Calendar view for possible conflicts after routes have been added to their schedules. If scheduling conflicts exist, they should adjust the starting times of appointments or delete them as necessary to resolve the conflicts.

Information for Configurators of Routes

This section contains information that may be useful to configurators making changes to the routes features.

The procedures documented in this chapter include buttons that invoke specialized methods, as described in Table 43.

Table 43.   Buttons and Methods for Routes Configurators

Button	Name of Method	Description	Supported On
Commit	CommitAccnt	Writes account names from temporary targeting tables to permanent tables where routes are stored.	Applet Layer
Intersection	ButtonIntersection	Intersection of lists	Applet Layer
Union	ButtonUnion	Union of lists	Applet Layer
Schedule - Routes More Info view	ShowPopup	Brings up a dialog box for sales representative and start date.	Bus Comp Layer
	OK	Creates an activity for the sales person to visit all accounts specified as route accounts	
Schedule - Target Accounts view	ShowPopup	Brings up a dialog box for sales representative and start date.	Bus Comp Layer
	OK	Creates an activity for the sales person to visit all accounts specified as route accounts	

Retail Execution 12

This chapter covers the procedures performed by retail sales representatives and their managers. Retail sales representatives schedule, plan, and carry out sales visits to retail outlets. At the outlet, the sales representative takes sales orders, performs retail assessments, creates return material authorizations (RMAs), and reviews store conditions. The Retail Execution module provides screens for all of these tasks.

About Retail Execution

The Retail Execution module helps retail sales representatives schedule, plan, and carry out sales visits to retail outlets. It provides views that allow retail sales representatives to perform a variety of retail visit activities, including taking sales orders, performing retail assessments, performing retail audits, creating return material authorizations (RMAs), and reviewing store conditions.

If retail managers use the Objectives module in Siebel Consumer Sector to schedule recommended activities, retail sales representatives can use the Retail Execution module to perform those recommended activities. For more information on objectives, see Chapter 10, "Objectives."

If retail managers use the Routes module in Siebel Consumer Sector to schedule visits, retail sales representatives and their managers can use the Retail Execution module to plan and carry out those scheduled retail visits. For more information on routes, see Chapter 11, "Routes."

Business Scenario

This scenario is an example of a workflow performed by retail sales representatives. Your company may follow a different workflow according to its business requirements.

A retail sales representative for a large food manufacturer visits a series of retail outlets in southern France each week. He is responsible for meeting with the retail outlet manager and performing various retail activities, such as taking retail orders, conducting retail audits, and promoting sales objectives established by his manager.

Each morning, he checks his calendar and starts planning his visits for the day. The retail sales representative begins by reviewing activities from prior visits, noting any outstanding issues that require special attention, and checking for any objectives that have been assigned to his accounts.

Today, he notices that a new objective named Southern France Beverage Launch has been created for one of the accounts he is scheduled to visit. A list of recommended activities has also been included:

■ Meet with the retail manager to make sure the new beverage is priced correctly

■ Take a retail order for the new beverage

■ Conduct a retail audit of the beverage to make sure it is correctly positioned on store shelves

■ Place point-of-sale coupons in the retail outlet

■ Record the delivery of merchandise to the retail outlet during the sales visit

The first three recommended activities all have a priority of 1-ASAP, so he applies them to this visit. As he has only one hour to spend at this account, he defers the remaining two activities until a subsequent visit.

Before entering the retail outlet, he records the start time of the visit. While in the store, he performs the applied recommended activities and take notes to be used when planning future visits. After completing the retail visit, he records the ending time of the visit and changes the status of the activities he performed to Done.

Example Workflow for Retail Execution

This is an example workflow for performing retail execution. Your company may follow a different workflow according to its business requirements.

End-User Procedures

To perform retail execution end users, such as retail sales representatives, complete the following tasks in the order given:

1 **Schedule a retail visit.** This procedure does not need to be performed if a retail sales representative used the Objectives or Routes modules to schedule store visits. For information on performing this procedure, see "Scheduling Retail Visits" on page 277.

2 **Plan the retail visit.** For information on performing this procedure, see "Planning Retail Visits" on page 278.

3 **Select retail activities.** For information on performing this procedure, see "Selecting Recommended Retail Activities" on page 280.

4 **Start the retail visit.** For information on performing this procedure, see "Starting a Retail Visit" on page 280.

5 **Perform the retail activities.** For information on performing this procedure, see "Performing Retail Activities" on page 281.

6 **End the retail visit.** For information on performing this procedure, see "Ending a Retail Visit" on page 289.

End-User Procedures

This section provides instructions for the following procedures:

■ To schedule a retail visit on page 278

■ To review the activities from a prior visit on page 278

■ To review an account's objectives on page 279

■ To apply recommended activities to a visit on page 280

■ To begin a retail visit on page 281

■ To add a retail activity to a visit on page 282

■ To take a retail order on page 283

■ To perform a retail assessment on page 284

■ To perform a retail audit using a form on page 285

■ To perform a retail audit using a list on page 286

■ To collect and record payments on page 288

■ To review store conditions on page 289

■ To end a retail visit on page 289

Scheduling Retail Visits

There are several ways of scheduling retail visits in Siebel Consumer Sector applications. Each of these ways makes use of a different module. The first two modules are discussed in other chapters of this guide.

■ If a retail sales representative is using the Objectives module, see "Scheduling Store Visits" on page 251.

■ If a retail sales representative is using the Routes module, see "Using a Route to Schedule Visits" on page 270.

If retail sales representatives are not using the Objectives or Routes module, they should perform the following procedure.

To schedule a retail visit

1 Navigate to the Accounts screen.

2 In the Account list, select an account.

3 Click the Outlet Visits view tab.

4 In the Outlet Visits list, add a new record.

 A new visit record is created in the Visits list. A value of 30 minutes is automatically entered in the Actual Duration field.

5 Complete the necessary fields.

Some of the fields in the Outlet Visits list are described in Table 44.

Table 44.   Some Fields in the Outlet Visits List

Field	Comments
Actual Duration	The total sum of the durations for each activity scheduled for the visit. This field is filled in after the Completed field is filled in. LOV Type: APPOINTMENT_DURATION
Completed	The date and time the visit was completed.
Start Time	The date and time the visit was started.
Status	The status of the visit (for example, In Progress). LOV Type: EVENT_STATUS

Planning Retail Visits

Planning a retail visit involves reviewing prior visit activities for an account and reviewing an account's objectives.

To review the activities from a prior visit

1 Navigate to the Accounts screen.

2 In the Account list, select an account.

3 Click the Outlet Visits view tab.

4 In the Outlet Visits list, drill down on the Visit Date hyperlink of the prior visit you want to review.

The Visit Execution view appears. In the Visit form, the selected visit appears. In the Activities list, the activities that you performed during that visit appear.

5 In the Activities list, drill down on the Activity Type hyperlink for the activity you want to review.

Information you recorded during this activity appears. The view that is displayed will vary depending on the activity type.

6 Use the History list or back arrow to return to the Visit Execution view.

Repeat Step 5 and Step 6 for each activity you want to review.

To review an account's objectives

1 Navigate to the Accounts screen.

2 In the Account list, select an account.

3 Click the Objectives view tab.

The Objectives list displays all of the objectives that have been targeted to the account.

4 Check the Start Date and End Date for each objective to determine if the objective is active.

5 In the Objectives list, select an objective.

Selecting Recommended Retail Activities

After reviewing prior visits, retail sales representatives are ready to select recommended retail activities to perform during a store visit, if desired. They can apply recommended activities to a visit by using the Apply button in the Account Outlet visit view. Alternatively, they can create retail activities for the visit. For information on creating retail activities, see "To add a retail activity to a visit" on page 282.

NOTE: You use the Objectives module to create recommended activities. For more information, see "Adding Recommended Activities to an Objective" on page 248.

To apply recommended activities to a visit

1 Navigate to the Accounts screen.

2 In the Account list, select an account.

3 Click the Outlet Visits view tab.

4 In the Outlet Visits list, select a visit.

   The Recommended Activities list displays the recommended activities for the selected visit.

5 In the Recommended Activities list, select the activities you plan to perform during the visit.

6 In the Outlet Visits form, click Apply.

Starting a Retail Visit

After completing the preceding tasks, retail sales representatives are now ready to start the retail visit. Typically, a retail sales representative begins a retail visit by navigating to the Visit Execution view.

To begin a retail visit

1 Navigate to the Accounts screen.

2 In the Account list, select an account.

3 Click the Outlet Visits view tab.

4 In the Outlet Visits list, select a visit and fill in the Start Time field.

5 Drill down on the Visit Date hyperlink.

   The Visit Execution view appears. The Activities list displays the selected retail activities for the visit.

   You are now ready to begin performing retail activities.

Performing Retail Activities

If retail sales representatives want to perform a retail activity that is not included as a recommended activity, they can create the activity for the retail visit.

During the visit, the retail sales representative will perform the activities selected for this visit. These activities may include:

■ Taking an order while visiting a retail outlet

■ Performing a retail assessment of the outlet

■ Performing a retail audit of products from the retail sales representative's organization or a competitor's products

■ Reviewing store conditions

■ Reviewing billings and collecting payments

Most retail activities are started by clicking an Activity Type hyperlink in the Activities list of the Visit Execution view.

To add a retail activity to a visit

1 Navigate to the Accounts screen.

2 In the Account list, select an account.

3 Click the Outlet Visits view tab.

4 In the Outlet Visits list, select a visit and drill down on the Visit Date hyperlink.

   The Visit Execution view appears.

5 In the Activities list, add a new record.

6 Click the Activity Type drop-down list, and select the type of retail activity you want to perform.

7 Complete the necessary fields.

   Some of the fields in the Activities list are described in Table 45.

Table 45.   Fields in the Activities List

Field	Comments
Alarm	Select the check box to enable an alarm for this activity.
Assessment Template	The name of the assessment template assigned to the activity. If the activity requires an assessment to be carried out, the relevant assessment template can be associated with the activity. For more information on assessment templates, see *Applications Administration Guide*.
Assigned To	To delegate the activity to someone else, select the appropriate employee and click OK.
Last Name	The last name of the contact person for the activity.
New	This field is automatically flagged when a visit is first created. Later, you can remove the flag from this field to indicate the visit is no longer new.
Products	Displays products associated with the activity.
Repeat	Select the check box to designate a repeating activity.
Repeat Until	The ending date of a repeating activity.

Table 45.   Fields in the Activities List

Field	Comments
Start Time	This field is automatically filled with the time at which the activity was created. Change this setting if necessary.
Status	The status of the activity (for example, In Progress). LOV Type: EVENT_STATUS
Suppress Calendar	If a check mark appears in this field, the activity will not appear in the Calendar views.

Taking a Retail Order

Typically, sales representatives take retail orders while visiting their accounts. Retail orders can be taken on a regularly scheduled basis or to make sure there is adequate inventory available when introducing a new product.

To take a retail order

1 Add the Retail Order activity to the Activities list in the Visit Execution view.

NOTE: For information on adding an activity to an account visit, see "To add a retail activity to a visit" on page 282.

2 Step off the new activity record and drill down on the Retail Order hyperlink you have just created.

The Sales Order view appears. An order record is automatically created in the Sales Order list.

3 In the Line Items list, add a new record.

4 Select one of the products for which you are taking the order and fill in the fields.

Repeat Step 3 and Step 4 for each additional product you want to add to the order.

5 Use the History list or back arrow to return to the Visit Execution view and perform another task.

For more information on the Orders screen, see *Siebel Field Service Guide* and *Online Help*.

Performing a Retail Assessment

Retail assessments measure an account against a set of predefined attributes. Typically, the predefined attributes are created as assessment templates. The assessment template can help to determine the possibility of introducing a new product or measure the retail presence of a competitor. For information about creating assessment templates, see the section on setting up assessment templates in *Applications Administration Guide*.

To perform a retail assessment

1 Add a Retail Assessment activity to the Activities list in the Visit Execution view.

NOTE: For information on adding an activity to an account visit, see "To add a retail activity to a visit" on page 282.

2 Step off the new activity record and drill down on the Retail Assessment hyperlink you have just created.

The Account Assessments view appears. The account you were previously working with is displayed in the Account form.

3 In the Assessments list, select the assessment you want to perform during this visit.

4 In the Assessment Attributes list, fill in the fields for each assessment attribute.

5 Use the History list or back arrow to return to the Visit Execution view and perform another task.

Performing a Retail Audit

Sales representatives perform retail audits to check that products are correctly priced, positioned, and stocked at retail outlets. Retail audits can be conducted on products from the retail sales representative's organization and a competitor's products. The retail sales representative can enter shelf conditions about products using a form or a list. The retail sales representative must complete the following tasks before performing a retail audit on a competitor's products.

■ Create the competitive product and add it to the product-category hierarchy. For information on performing this task, see Chapter 5, "Product Distribution."

■ Set up product distribution lists. A competitor's product must appear on an authorized product distribution list before it can be included in a retail audit. For information on performing this task, see Chapter 5, "Product Distribution."

To perform a retail audit using a form

1 Add a Retail Audit activity to the Activities list in the Visit Execution view.

NOTE: For information on adding an activity to an account visit, see "To add a retail activity to a visit" on page 282.

2 Step off the new activity record and drill down on the Retail Audit hyperlink you have just created.

The Retail Audit view appears.

3 Click the Retail Audit view tab.

4 In the Retail Audit list, click List Products.

A list of all products authorized for distribution to the account and designated for a retail audit appears in the Retail Audit list. The list includes both products from the retail sales representative's organization and competitive products and is sorted by merchandising location.

5 In the Retail Audit list, select a product for which you want to perform a retail audit.

6 In the Store Conditions form, the retail sales representative records observations about the conditions of the selected product in the appropriate fields.

7 In the Account Activity form, click the Status drop-down list, and then select Done when the retail sales representative has finished conducting the audit.

The current time and date are automatically recorded in the Completed field.

8 Use the History list to return to the Visit Execution view and perform another task.

To perform a retail audit using a list

1 Add a Retail Audit activity to the Activities list in the Visit Execution view.

> **NOTE:** For information on adding an activity to an account visit, see "To add a retail activity to a visit" on page 282.

2 Step off the new activity record and drill down on the Retail Audit hyperlink you have just created.

The Retail Audit view appears.

3 Click the Retail Audit List view tab.

4 In the Retail Audit List drop-down list, select Retail Audit.

5 In the Retail Audit List, click List Products.

A list of all products authorized for distribution to the account and designated for a retail audit appears in the Retail Audit List. The list is sorted by merchandising location.

6 In the Retail Audit List, select a product for which you want to perform a retail audit, and then record you observations about the shelf conditions of the selected product in the appropriate fields.

7 In the Account Activity form, click the Status drop-down list, and then select Done when you have finished conducting the audit.

The current time and date are automatically recorded in the Completed field.

8 From the Retail Audit List drop-down list, select Retail Audit Analysis to view a graphical representation of Facing Number by Product.

To create an RMA (Return Material Authorization)

1 Add a Return Order activity to the Activities list in the Visit Execution view.

NOTE: For information on adding an activity to an account visit, see "To add a retail activity to a visit" on page 282.

2 Step off the new activity record and drill down on the Return Order hyperlink you have just created.

The Details Order view appears.

3 In the Sales Orders list, add a new record.

4 Click the Type drop-down list, select the type of RMA you want to create, and fill in the fields.

5 Drill down on the Order Number hyperlink.

The Order Entry - Line Items view appears.

6 Click the Line Items view tab.

7 In the Line Items list, add a new record.

8 Click the Product select button.

The Pick Product dialog box appears.

9 Select one of the products for which you are creating the RMA and click OK.

10 Fill in the fields.

11 Repeat Step 7 through Step 10 for each additional product you want to add to the RMA.

For more information on creating RMAs, see *Siebel Field Service Guide* and *Online Help*.

To review an RMA (Return Material Authorization)

1 Navigate to the Accounts screen.

2 In the Accounts list, select the account for which you want to review an RMA.

3 Click the Orders view tab.

4 In the Orders list, perform a query in the Type field for the type of RMA you want to review.

Collecting and Recording Payments

Retail sales representatives periodically review account billings and collect payments, which must be recorded.

To collect and record payments

1 Add a Review Billings activity to the Activities list in the Visit Execution view.

> **NOTE:** For information on adding an activity to an account visit, see "To add a retail activity to a visit" on page 282.

2 Step off the new activity record and drill down on the Review Billings hyperlink you have just created.

The Account Invoices view appears.

3 Review the listed invoices and determine if any are outstanding.

4 To record a payment, drill down on the Invoice # hyperlink.

The Invoice Line Items view appears.

5 In the Invoices screen, select the Payments view tab.

6 Create a new payment record.

7 Complete the necessary fields.

Reviewing Store Conditions

Retail sales representatives periodically review the store conditions of an account. The review measures store conditions over time and is useful for managers who are analyzing an account.

To review store conditions

1 Navigate to the Accounts screen.

2 In the Accounts list, select the account for which you want to review store conditions.

3 Click the Store Conditions view tab.

4 In the Store Conditions list, select the product for which you want to check store conditions.

   A list of previous store condition reviews appears.

5 From the Store Conditions drop-down list, select Store Condition Chart to view a graphical representation of changes in the Price Point or Facing Number between various store condition reviews.

Ending a Retail Visit

After performing the selected retail activities, the retail sales representative is now ready to end the retail visit.

To end a retail visit

1 Navigate to the Accounts screen.

2 In the Account list, select the account whose visit you want to end.

3 Click the Outlet Visits view tab.

4 In the Outlet Visits list, select the visit you want to end, and then fill in the Completed field.

Information for Configurators of Retail Execution

This section contains information that may be useful to configurators making changes to the product distribution features.

The procedures documented in this chapter include buttons that invoke specialized methods, as described in Table 46.

Table 46. Buttons and Methods for Retail Execution Configurators

Button	Name of Method	Description	Supported On
Apply	OnSetUpVisits	Applies recommended activities to selected visit.	Bus Comp Layer
List Products (Retail Audit List)	InstantiateAcctMerchLocProducts	Finds all products that belong to merchandising location and have retail audit flag set to true, and adds them as products to account activity for parent account.	Applet Layer
List Products (Retail Audit)	InstantiateAccountProducts	Adds all authorized products to parent account activity.	Applet Layer

Account Targeting 13

Account Targeting allows end users to perform advanced queries on accounts and save the results as target lists. This chapter describes how administrators and retail sales representatives use the queries in Account Targeting to create target lists and merge them with other target lists.

The target list can be applied to a route, an objective, or a promotion. For information on applying target lists to:

■ Routes, see Chapter 11, "Routes"

■ Objectives, see Chapter 10, "Objectives"

■ Promotions, see Chapter 7, "Trade Promotions"

NOTE: The Account Targeting module is designed for end users, such as retail sales representatives, who have local data access and are not continuously connected to a network.

About Account Targeting

Account Targeting can only be used on a mobile user's local database. It allows end users to perform advanced queries on accounts and save the results. The results of these queries are called *target lists*. Target lists consist of accounts that meet the conditions defined by a query and can be applied by end users when scheduling routes or viewing objectives. Typically, target lists are for a specific purpose and period of time, such as in support of a promotion, a campaign, or an objective.

The views in the Target Accounts screen are designed for performing the kinds of advanced queries on accounts that retail sales representatives are most likely to need when creating target lists. For example:

■ Accounts in New Jersey with sales greater than $60,000 over the last half year

■ Accounts that are located within a specific range of zip codes, and that were last audited over five weeks ago

■ Accounts in California that are out of stock for a product

■ Accounts that are visited weekly, have a distribution code of B, and last placed an order more than three weeks ago

Target lists can be applied individually or in combination with other target lists when you are scheduling routes, or designing objectives or promotions. For example, you can generate a target list of all California accounts that are out of stock of 20-oz. bottles of Apricot Splash. You can generate another account list containing all California accounts that have not been visited for the past 30 days. You can intersect the two lists and save the target list of all California accounts that have not been visited for the past 30 days and are out of stock of 20-oz. bottles of Apricot Splash. This target list can be applied to routes visited by retail sales representatives. For information on assigning target lists to routes, see "Assigning Target Lists to a Route" on page 267.

NOTE: Account Targeting queries must be executed in the same view in which they were created, so naming standards should include the name of the appropriate view.

Business Scenarios

These scenarios are examples of workflows performed by a system administrator, key account managers, retail managers, and sales representatives to create lists of target accounts. Your company may follow a different workflow according to its business needs.

The first business scenario presented here illustrates how key account managers can create target lists for use by retail sales representatives. The second business scenario illustrates how retail sales representatives can create and use their own target lists.

Key Account Managers Creating Target Lists for Sales Representatives

A brand manager establishes a promotion to be run at all grocery stores. The key account manager for the corporate headquarters of a large chain of grocery stores is responsible for supporting this promotion. As part of the support for this promotion, the key account manager wants sales representatives to target specific accounts.

The key account manager begins by determining the key attributes that are necessary for a successful promotion. She determines that the intersection of accounts with a store condition of Out of Stock and accounts with an industry type of Grocery and Order Quantity > 100 is the optimal set of accounts for the sales force to focus on. She creates the following two predefined queries. For the first predefined query, she generates a list of accounts with a store condition of Out of Stock and saves this list. She creates a second predefined query to generate a list of accounts with an industry type of Grocery and Order Quantity > 100 and saves this list. She intersects the two lists and a target list of 41 accounts is returned.

The key account manager emails the system administrator to request that the two predefined queries she has created be made public. The system administrator unlocks the two predefined queries. This allows all Consumer Sector users to view and execute them. The system administrator emails the key account manager to let her know the predefined queries have been made public and are now available to anyone using the Consumer Sector application.

The key account manager sends an email to her retail managers and retail sales representatives directing them to intersect a list of accounts with a store condition of Out of Stock and a list of accounts with an industry type of Grocery and Order Quantity > 100.

A retail sales representative is sitting at home Sunday evening planning for the next week. He receives the email message and decides to plan this into his route immediately. In his local database, he executes the two public predefined queries and saves the target list of returned accounts.

The retail sales representative now has three options. He can assign the target list to a route he created, save the target list for a later date, or select a different view and the target list will be deleted. After assigning the target list to a route, he can add and delete accounts from the list. He can also select only the accounts he wants to add to the route. The retail sales representative decides to assign the target list to a route and adds accounts from the list.

Finally, before he shuts his computer down for the evening, he deletes all target lists that are more than two weeks old.

Creating Target Lists for Sales Representatives

A retail sales representative is planning his visits for the next week. Each day, he visits between 40 and 50 different accounts, often spending only a few minutes at each account. Because he is responsible for such a large number of accounts, he needs to be able to track his visits and the activities he performed during those visits.

He determines that the union of accounts that did not place an order last week and have not been audited in the last two weeks is the optimal set of accounts for him to visit. He creates the following two queries. For the first query, he generates a list of accounts that did not place an order last week and saves this list. He creates a second query to generate a list of accounts that have not been audited in the last two weeks and saves this list. He combines the two lists and a target list of 48 accounts is returned. Since this is the list of accounts the retail sales representative wants to visit this week, he assigns the target list to his route for the upcoming week.

Example Workflow for Account Targeting

This is an example workflow for performing account targeting. Your company may follow a different workflow according to its business requirements.

Administrator Procedures

When performing account targeting, key account managers and system administrators complete the following procedures:

1 **Make the predefined query public.** Administrators unlock a private predefined query and change it to a public predefined query. This allows all users to view and execute the query. For more information, see "Making a Predefined Query Public" on page 297.

2 **Delete saved predefined queries.** Administrators delete predefined queries that are no longer relevant. This allows only current predefined queries to be viewed and executed. For more information, "Deleting a Saved Predefined Query" on page 298.

End-User Procedures

To perform account targeting, retail sales representatives complete the following tasks:

1 Create and save a target list. Retail sales representatives perform queries to locate the accounts they want to target. Although this may be done in any number of views, the views in the Target Accounts screen are specifically designed for the type of advanced queries likely to be performed. The results of a query is saved and given a descriptive name. The date on which a query was created is automatically saved. For more information on performing these procedures, see "Creating a Target List" on page 299 and "Saving a Target List" on page 302.

NOTE: A saved target list consists only of accounts that matched the query criteria when the query was performed; retail sales representatives should re-create their target lists periodically to include accounts that were added after the target list was saved, or whose data has changed since the target list was saved.

After creating and saving a target list, retail sales representatives can merge (intersect or combine) it with other target lists. After merging target lists, they can assign the results to a route in the view that they use to plan their routes or objectives. After assigning the list of accounts to a route, they can add or delete accounts to optimize their target list. For information on performing this procedure, see "Assigning Target Lists to a Route" on page 267.

2 Delete a target list. Retail sales representatives can delete target lists that are no longer applicable. For example, a target list may become old and no longer valid. For more information on performing this task, see "Deleting a Target List" on page 303.

Administrator Procedures

This section provides instructions for the following procedures:

■ To make a predefined query public

■ To delete a saved query on page 298

Making a Predefined Query Public

Predefined queries must be made public before they can be viewed and executed by end users.

To make a predefined query public

1 From the application-level menu, choose View > Site Map > Application Administration > Predefined Queries.

2 In the Predefined Queries list, click the menu button, and then select New Query.

3 Click the Object drop-down list and select Account Target.

4 In the Predefined Queries list, click the menu button and select Run Query.

A list of all predefined queries containing Account Target is returned.

5 In the Predefined Queries list, select the record containing the predefined query you want to make public.

NOTE: Check that the name of the query includes the view in which it was created, so that other users will execute the query in the same view. The view name in which the query was created appears in the Query column, and the name of the query can be edited in the Name column.

6 In the Predefined Queries list, click the Private field and change the letter to a 'Y'.

The predefined query is now public and can be executed by all users with access to the Account Targeting views.

NOTE: Other users must first exit and reenter the application before they can see the new public query.

Deleting a Saved Predefined Query

You can delete saved queries that are no longer needed, such as after a promotion or sales event has expired. This allows users to view and execute only current predefined queries.

To delete a saved query

1 From the application-level menu, choose View > Site Map > Application Administration > Predefined Queries.

2 In the Predefined Queries list, click the menu button and select New Query.

3 Click the Object drop-down list and choose Account Target.

4 In the Predefined Queries list, click the menu button, and then select Run Query.

   A list of all predefined queries containing Account Target is returned.

5 In the Predefined Queries list, select the record containing the predefined query you want to delete, click the menu button, and then select Delete Record.

   The selected predefined query is deleted and can no longer be viewed or executed.

End-User Procedures

This section provides instructions for the following procedures:

■ To refine a query on page 300

■ To create a target list based on demographics and assessments on page 300

■ To create a target list based on orders on page 301

■ To create a target list based on store conditions on page 301

■ To save a target list on page 302

■ To delete a target list from a Targeting view on page 304

■ To delete a target list from the Account List view on page 305

Creating a Target List

The views in the Target Accounts screen allow end users to select profile information on which to query, such as visit frequency, last visit date, and order date. The results that they save consist of a set of accounts.

If end users are querying only on an account profile attribute, they should use the Account Information view. This view has been designed to return all accounts that meet the query condition, whether or not the accounts contain demographic or assessment information. Using a different view to query on account profile information will return accounts that meet the query conditions *and* the condition for which the view was designed. For example, querying from the Orders view will return only those accounts that contain orders and meet the query conditions. For information on performing queries, see *Fundamentals* and *Online Help*.

NOTE: Account Targeting is used on your local database. End user's target lists are not synchronized with the Siebel server. Therefore, if they receive a new database extract, they will need to re-create their target lists. However, if an end user is a remote user of Siebel, the normal process of synchronizing a local database with the Siebel server will not affect the end user's target lists.

Refining a Query

End users who want to perform queries on fields across multiple forms in a single targeting view will need to use the refine query feature. For example, an end user who wants to perform a query for all California accounts with a distribution code of A must enter the first query criteria (all California accounts) in the Account Attribute Selection form and then refine the query in the Demographics and Assessment form to include only those accounts with a distribution code of A.

To refine a query

1 Navigate to the Target Accounts screen.

2 From the Show drop-down list, select the Targeting view on which you want to perform the query.

   ■ To perform a query on demographics and assessments, select Account Information

   ■ To perform a query on orders, select Orders

   ■ To perform a query on store conditions, select Store Conditions

3 In the Account Attribute Selection form, click the menu button, and then select New Query.

4 Enter the criteria in the fields for which you want to perform a query.

5 In the next form, click the menu button, and then select Refine Query.

6 Enter the criteria in the fields for which you want to perform a query, click the menu button, and then select Run Query.

   In the Target Accounts list, accounts that satisfy both sets of query criteria appear. To save the target list, see .

To create a target list based on demographics and assessments

1 Navigate to the Target Accounts screen.

2 From the Show drop-down list, select Account Information.

3 In the Demographics and Assessment list, click the menu button, and then select New Query or select a predefined query from the Queries drop-down list.

4 Specify the query criterion or refine a predefined query if necessary.

5 In the Demographics and Assessment list, click the menu button, and then select Run Query.

The results of the query are returned. To save the target list, see "To save a target list" on page 302.

NOTE: The more fields in which an end user enters query criteria, the longer it may take to execute the query. Also, if an end user enters a query condition that is too general (such as all accounts with a Weekly ACV greater than 1), it may take a significant amount of time to save the query later, due to the number of records meeting the query criteria.

To create a target list based on orders

1 Navigate to the Target Accounts screen.

2 From the Show drop-down list, select Orders.

3 In the Order list, click the menu button and select New Query or select a predefined query from the Favorites drop-down list.

4 Specify the query criterion or refine a predefined query if necessary.

5 In the Order list, click the menu button, and then select Run Query.

The results of the query are returned. To save the target list, see "To save a target list" on page 302.

To create a target list based on store conditions

1 Navigate to the Target Accounts screen.

2 From the Show drop-down list, select Store Conditions.

3 In the Store Condition list, click the menu button and select New Query or select a predefined query from the Favorites drop-down list.

4 Specify the query criterion or refine a predefined query if necessary.

5 In the Store Condition list, click the menu button, and then select Run Query.

The results of the query are returned. To save the target list, see "To save a target list" on page 302.

NOTE: When an end user queries on a product and a store condition, only the last audit date of the product is queried for the specified condition. When an end user queries only on a store condition, all products with the store condition will be returned.

Saving a Target List

When an end user has finished creating and refining a target list, the list can be saved and applied to a route. For information on applying a target list to a route, see "Assigning Target Lists to a Route" on page 267.

To save a target list

1 Follow one of these procedures to create a target list:

- To create a target list based on demographics and assessments on page 300

- To create a target list based on orders on page 301

- To create a target list based on store conditions on page 301

2 In the toolbar, click the save target list button, located in the row of buttons adjacent to the history button.

NOTE: Do *not* use the keyboard shortcut CTRL + S, the Edit > Query > Save command (from the menu bar), or the Save Query As dialog box to save the query unless the end user wants to make a particularly complex query public or it is a query that will be run frequently. For more information, see "Making a Predefined Query Public" on page 297

The Targeting dialog box appears with a blank Target Name field.

3 In the Target Name field, enter a unique name for the target list.

> **NOTE:** If the end user enters a name already in use, the previously saved target list will be overwritten without warning.

4 Click Save.

The target list is saved. It can be applied to a route, an objective, or a promotion. For information about applying a target list to an objective, see Chapter 10, "Objectives," and for information about applying a target list to a promotion, see Chapter 7, "Trade Promotions."

> **NOTE:** The saved target list includes only those records that matched the query criteria *when the query was generated*. End users should re-create their target lists periodically, since data may have been modified or new accounts may have been added since they created the target list.

Deleting a Target List

End users can delete a target list from one of the account profile views or the query view. Make sure that they delete only those target lists that are no longer needed. There is no confirmation prompt before a target list is deleted from an account profile view.

> **NOTE:** Target lists can be deleted from any Targeting view. It is not necessary to navigate to the view in which the target list was created to delete a target list.

To delete a target list from a Targeting view

1 Navigate to the Target Accounts screen.

2 From the Show drop-down list, select the Targeting view for the target list the end user wants to delete.

- Select Account Information to delete a target list based on demographics and assessments.

- Select Orders to delete a target list based on orders.

- Select Store Conditions to delete a target list based on store conditions.

3 From the application-level menu, choose Edit > Save Target List.

The Targeting dialog box appears.

4 Click to select the target list (query name) that the end user wants to delete.

5 Click Delete.

To delete a target list from the Account List view

1 Navigate to the Target Accounts screen.

2 From the Show drop-down list, select Account Lists.

3 In the Target List Name list, select the target list the end user wants to delete, click the menu button, and then select Delete Record.

   A dialog box appears and prompts, "Are you sure you want to delete the current record?"

4 Click Yes.

   The selected target list is deleted.

Assortment Plans 14

This chapter describes the procedures necessary to create and modify assortment plans, and share them with channel partners.

About Assortment Plans

An *assortment plan* contains detailed information about products a customer plans to order from your company in an upcoming season. For each product the customer plans to order, the assortment plan specifies the total quantity and total monetary amounts to be ordered for the season. In addition, the assortment plan can create a breakdown of the quantities and monetary amounts to be ordered in each delivery period within the season.

Assortment plans are particularly applicable to the apparel and footwear industry, because of the complexity of the products available. For example, each shoe style manufactured by one company can come in a variety of colors and sizes, can be available at different seasons and prices, and might need to be delivered in varying quantities during a delivery period.

Assortment plans are typically created through the collaboration of an account representative from your company and a buyer for your customer's company. When the assortment planning feature is used with a Siebel customer or partner application, such as eChannel for Apparel and Footwear, buyers can log onto a Web site, examine their assortment plans, and edit product quantities.

About Planning Groups

Planning groups allow you to plan for a number of retail outlets with similar planning needs. For example, a buyer for a chain of department stores is responsible for all the purchasing for a region that includes 50 outlets located in areas with similar demographics and purchasing behavior. To facilitate planning, the key account manager can include all 50 outlets in one planning group and create a single assortment plan that can be used for all the outlets in the planning group.

An administrator assigns categories to planning groups, to determine which products are available to the accounts within that group. Only the categories that are appropriate to that planning group's needs are assigned, which reduces the work of sorting through products that are not appropriate for that planning group while creating assortment plans.

Business Scenario for Assortment Plans

These scenarios are examples of workflows performed by marketing administrators and key account managers. Your company may follow a different workflow according to its business requirements.

The marketing administrator at a large apparel and footwear company is responsible for maintaining the personalization attributes (Account Channel and Product Differentiator) that help match the right product to the right account. She is also responsible for making sure that seasons are established, the appropriate price lists are loaded, and the products have correct Effective Start and Effective End dates that dictate when the products will be generally available in the marketplace.

The marketing administrator establishes the selections that key account managers will be able to use when developing assortment plans. This includes setting up and maintaining season periods, delivery periods, and the list of values (LOVs) associated with the delivery flow algorithms.

In some instances, certain accounts sell only selected categories of products. To streamline the assortment planning process, she assigns specific categories to the accounts. This way, the key account manager will not have to filter through categories and products that should not be available to certain accounts' assortment plans.

One of this apparel and footwear company's key account managers manages several accounts in Northern California, including Retailer X. This manager usually creates planning groups for accounts that have multiple retail outlets. However, because there is only one outlet of Retailer X in this region, he chooses not to create a planning group.

The key account manager is determining an appropriate assortment plan for Retailer X for the upcoming season. He starts by reviewing historical sales figures for Retailer X for the prior year period, to help in planning Target and Plan units. Last year Retailer X purchased 9,000 units and $45,000 worth of merchandise.

He then selects the categories and styles of products that he will sell to Retailer X. He selects all categories and styles that are associated to the price list and season, but he could have picked certain categories that are applicable for a particular buyer at Retailer X.

The key account manager determines the type of product flow to apply to this account and season. Sales are slowest in January, because it follows the big Christmas selling season. So he chooses a Back Load delivery flow, with more product shipping in March than in January.

The key account manager has set a sales target of 12,000 units and $60,000 for the upcoming season. He needs to target this volume by the appropriate category, divided equally among Men's Apparel and Women's Apparel categories. He targets both units and amount separately. He targets these separately because of the short product lifecycle in his industry. The styles that sold last year have been discontinued. Since the product offering is different for this season, there is no direct correlation to the price that last year's models sold for. Once he is satisfied with the distribution of total units across his planned categories, he will spread them across the valid periods (Jan-Feb-March), based on a Back Load delivery flow. If he is unhappy with the exact details, he can override each field manually.

Now the key account manager is ready to create the style details for the current assortment plan. He can sit down with the buyer and determine the plan together, but he chooses to prepare a plan before meeting with his buyer, to create a suggestive sales approach. He analyzes each of the available styles, generally based on history or target units, and begins the iterative process of assigning a Plan Unit quantity to each style. This plan can be based on what he thinks the retailer can sell, or what the retailer's open-to-buy budget is, or the key account manager's established sales goals for Retailer X.

The key account manager starts with Men's Apparel, where there are three styles that are segmented for Retailer X: Shirts, Pants, and Shorts. He knows that Shirts, and Pants are each capable of supporting 1,000 units of business for the upcoming season at Retailer X. He enters these units, but leaves the Shorts style blank (zero units). He verifies the dollar amount that this unit plan calculates (based on the appropriate price list).

The key account manager knows that the default delivery flow is not quite right for each style, and can choose to Front Load one style and Back Load the others, and can then view the extended spread over the months of the upcoming season (Jan-Feb-March). Since the marketing administrator has already entered all of the valid availability dates, all of the styles automatically populate in the appropriate months. For instance, if the Pants style is not available in Feb-March, zero units would populate in the Jan field. This way, the key account manager does not have to worry about planning a style in a month that is not permitted by his company.

Since the Shorts style is planned for zero units, he trims it from this assortment plan. Trimming is particularly helpful when there are several styles to choose from in a particular category. If an account is capable of carrying only a few styles of the total offering, trimming streamlines the process.

The key account manager recognizes that the incorrect price is assigned to the apparel styles, and selects another price list and reprices the styles. The marketing administrator has established valid price lists, which prevents key account managers from entering an incorrect price.

After the key account manager has followed each of these steps, he has an assortment plan that he can share with his buyer at Retailer X. Since his company uses Siebel eChannel for Apparel and Footwear, the key account manager can make his assortment plan available to his buyer over the Internet. He sends email to his sales manager to let her know the plan is ready.

The sales manager has received email from all of the members of her team of key account managers, letting her know that their assortment plans for all of the retail outlets of Retailer X are ready for approval. Her company uses this approval process to make sure that corporate directives are met, and that sales targets are tightly managed.

The sales manager reviews each of her team's plans, and then consolidates all of the plans into a single Retailer X master plan for the upcoming Spring season.

She can update new category target information for her team's plans.

Example Workflow for Assortment Plans

Before end users can create assortment plans, an administrator must perform the following steps in the order given:

Administrator Setup Procedures

1 **Set up product distribution strategy.** Consumer Sector applications can use personalization attributes (account channel and product differentiator), and account categories to display only the products appropriate for the account when end users are setting up assortment plans. For more information about controlling product distribution, see Chapter 5, "Product Distribution."

2 **Create product records and price lists.** Before users can create assortment plans, product records and price lists must be created by an administrator, or brought in from another database. For information about creating product records and price lists, see Chapter 4, "Products."

3 **Create delivery and season periods.** Assortment plans can be spread across the delivery periods in the season for which the plan is created. In addition, assortment plans are effective for specific seasons. You must make sure that the appropriate delivery periods and seasons are available in the Periods list of values. For more information, see Chapter 2, "Getting Started."

4 **Create Corporate Delivery Flow Models.** *Corporate delivery flow models* specify the weighting percentages used to determine how many product units will be delivered in each delivery period within a season. Account managers use these models when creating assortment plans. For more information, see "Corporate Delivery Flow Models" on page 315.

5 **Create Delivery Flow Types.** If additional delivery flow types are required, an administrator creates them. For more information, see "Corporate Delivery Flow Models" on page 315.

6 **Adding Channel Partners and Customers as Employees.** If your company has implemented Siebel eChannel for Apparel and Footwear, or a Siebel customer application, end users can make assortment plans available to customers over the Internet. An administrator must grant access to customers who want to see their assortment plans. For more information, see *Customer and Partner Applications Administration Guide for Industry Applications*.

End-User Procedures

Once the administrator setup procedures are completed, end users can begin the assortment planning process. To create an assortment plan, end users complete the following procedures.

1 **Optional: Create a planning group.** For more information, see "Adding or Modifying a Planning Group" on page 319.

2 **Add an assortment plan.** For more information, see "Creating or Revising an Assortment Plan" on page 322. For details about adding assortment plans for planning groups, see "To create or modify an assortment plan for a planning group" on page 326.

3 **Select product categories.** For more information, see "Selecting Categories for an Assortment Plan" on page 327.

4 **Add category targets.** For more information, see "Entering Category Targets" on page 328.

5 **Optional: Create account-specific delivery flow model.** If an account needs a delivery pattern that is not in the corporate delivery flow model, users can create a customized delivery flow. For more information, see "Creating Account-Specific Delivery Flow Models" on page 336.

6 **Add product details**. For more information, see "Adding Product Details to Assortment Plans" on page 331.

7 **Optional: Create a consolidated assortment plan.** Multiple assortment plans can be aggregated into one consolidated assortment plan. For more information, see "Creating Account-Specific Delivery Flow Models" on page 336.

8 **Optional: Make assortment plans visible on the Web.** For more information, see "Making Assortment Plans Visible on the Web" on page 338.

Administrator Maintenance Procedures

If end users have established planning groups, an additional optional procedure is introduced for administrators.

■ **Optional: Assign categories to planning groups.** To limit the number of categories end users must browse while creating assortment plans for planning groups, an administrator can assign categories of products to the planning group. Because a planning group is an account of the Type Planning, the procedure for assigning product categories to it is identical to adding product categories to any other account. For information on this procedure, see Chapter 5, "Product Distribution."

Administrator Setup Procedures

The following sections describe the administrative setup procedures that are specific to assortment planning. For a list of all of the procedures that must be performed to take full advantage of assortment planning, see "Administrator Setup Procedures" on page 312.

This section provides instructions for the following procedures:

- To create corporate delivery flow models on page 317

- Setting up "Corporate Delivery Flow Models"

Corporate Delivery Flow Models

Corporate delivery flow models specify the weighting percentages used to determine how many product units will be delivered in each delivery period within a season. Account managers use these models when creating assortment plans.

You can create several corporate delivery flow models to represent all the typical product delivery patterns your customers request. For instance, you might create a corporate delivery flow model named Three Drop Front Loaded for customers who request the following delivery pattern for an upcoming season: 50 percent of the products delivered in the first delivery period and 25 percent each in the second and third delivery periods. You might create another model, called Three Drop Even, for customers who want to receive the same percentage of their order in each of three delivery periods.

Account managers use corporate delivery flow models to specify the delivery pattern for each product in an assortment plan. For example, if a customer wants to place their order of baseball shoes into the first of three delivery periods in an upcoming season, the account manager would select the Three Drop Front Loaded corporate delivery flow model from the example above for each baseball shoe in the account's assortment plan. If the same customer prefers an even spread of soccer shoe deliveries for the same three delivery periods, the account manager would select the Three Drop Even corporate delivery flow model for all soccer shoes in the assortment plan.

NOTE: You can also create account-specific delivery flow models to meet the requirements of individual customers. For more information, see "Creating Account-Specific Delivery Flow Models" on page 336.

Preselection of Corporate Delivery Flow Models

Delivery flow models are automatically preselected for each product in an assortment plan, if the required information has been entered into the database. The following criteria are considered in this process:

■ The Start Date and End Date of the season chosen for the assortment plan

■ The Delivery Period Type chosen for the assortment plan

■ Each product's Effective Start Date and Effective End Date

■ The Number of Periods for each delivery flow model

■ The Delivery Flow Type

■ Whether the Recommended Flag has been selected in each delivery flow model

The application determines the number of periods for each product in the assortment plan by comparing the season's Start Date and End Date, the assortment plan's Delivery Period Type (such as Weekly or Monthly), and the product's Effective Start date and Effective End Date. For instance, if an assortment plan runs from July 1 through September 30 and has a Delivery Period Type of Monthly, the assortment plan will have three delivery periods. However, if a given product in the assortment plan is available from June 1 through August 31, that product will have only two delivery periods that fall within the assortment plan's season.

The application preselects the delivery flow model that meets the following two requirements:

■ It has the same Number of Periods value as the product

■ It has the same Delivery Flow Type value as the product's category

If more than one delivery flow model meets these two requirements, the application preselects the model for which the Recommended Flag field has been selected.

To support this functionality, you must create delivery flow models for each unique combination of Number of Periods and Delivery Flow Type that is possible within each assortment plan. In addition, if you create more than one delivery flow model with the same Number of Periods value and the same Delivery Flow Type value, you must select the Recommended Flag field for one of these models.

To create corporate delivery flow models

1 From the application-level menu, choose View > Site Map > Data Administration > Assortment Planning - Delivery Flow.

2 In the Delivery Flow Model list, click New to add a record, complete the necessary fields, and click Save.

Some of the fields are described in the following table.

Field	Comments
Delivery Flow Model	The name of the Delivery Flow Model, such as Even - 3 drop.
Number of Periods	The number of delivery periods. This value determines the number of records that are created in the Algorithm list.
Delivery Type	A value used to classify the pattern of weighting you create for the delivery flow model. In the standard product, the available values are Even, Front Load, and Back Load. You can edit these values or create additional ones. For more information, see *Applications Administration Guide*. LOV Type: DEL_FLOW_TYPE
Recommended Flag	An optional field used to help determine which delivery flow model is preselected for a product. If you create more than one delivery flow model with the same Number of Periods and Delivery Flow Type, you should select the Recommended Flag for one of these models.

3 In the Algorithm list, edit the values in the Weighting field for each delivery date to represent the delivery pattern you want to specify for this delivery flow model.

NOTE: The total of all the values in the Weighting column is automatically calculated. The total must be 100 to create a useful corporate delivery flow model.

4 Select the algorithms you wish to commit to the database and click Save, or click Save All to save all of the algorithms on the list.

End-User Procedures

This section provides instructions for the following procedures:

- To create new planning groups on page 319

- To add an account to a planning group on page 320

- To remove an account from a planning group on page 320

- To make planning group assortment plans visible to member accounts' sales teams on page 321

- To remove planning group assortment plan visibility from member accounts' sales teams on page 321

- To create an assortment plan from the Accounts screen on page 322

- To create an assortment plan from the Assortments screen on page 325

- To revise an assortment plan in the Assortments screen on page 325

- To create an assortment plan based on an existing assortment plan on page 326

- To create or modify an assortment plan for a planning group on page 326

- To browse categories and products for an assortment plan on page 327

- To add categories and associated products to an assortment plan on page 328

- To add target units to an assortment plan on page 329

- To add target amounts to an assortment plan on page 330

- To create account-specific delivery flow models on page 336

- To add product units to an assortment plan on page 331

- To change a delivery period quantity for a product on page 333

- To change product prices on page 333

- To find out whether products are being ordered through a buying group on page 334

Adding or Modifying a Planning Group

A planning group is a group of accounts that you use to facilitate the planning of products for a season. Planning groups allow you to plan for many accounts by creating a master assortment plan that you use for all accounts within a planning group.

You begin the process of creating planning groups by creating a new account that represents the planning group. Best business practices dictate that all of the accounts associated with this planning group belong to the same organization, which is usually a single company or corporation. However, accounts from many different companies can be added to a planning group. Also, individual accounts can belong to more than one planning group.

To create new planning groups

1 Navigate to the Groups screen.

2 From the Show drop-down, select My Planning Groups, if necessary.

3 In the Groups list add a record and complete the necessary fields.

NOTE: The Account Type field is prepopulated with the value Planning Group. This is the correct value for this field.

Adding or Removing an Account from a Planning Group

After you create a planning group, you associate accounts with it. Accounts can also be removed from the planning group.

To add an account to a planning group

1 Navigate to the Groups screen.

2 From the Show drop-down, select My Planning Groups, if necessary.

3 In the Groups list, click the name hyperlink of the planning group to which you would like to add an account.

   The Planning Group Accounts view appears.

4 In the Accounts list, click New.

5 In the Add Accounts dialog box, select one or more accounts to add to the planning group and click OK.

   All the accounts you added to the planning group appear in the Accounts list.

To remove an account from a planning group

1 Navigate to the Groups screen.

2 From the Show drop-down, select My Planning Groups, if necessary.

3 In the Groups list, click the name hyperlink of the planning group to which you would like to remove an account.

4 The Planning Group Accounts view appears.

5 In the Accounts list, select the account you would like to remove.

6 Click the Accounts list menu button and select Delete Record.

Adding Planning Group Account Team Members

To make planning group assortment plans visible to sales team members of each member account, add the team members from the member accounts to the planning group team. Do this by activating planning group assortment plan visibility. Once you have done this, sales team members for each of the member accounts can view the planning group assortment plans in the My Assortment Plans view and the Account Assortment Planning view.

To make planning group assortment plans visible to member accounts' sales teams

1 Navigate to the Groups screen.

2 From the Show drop-down list, select My Planning Groups, if necessary.

3 In the Groups list, click the name hyperlink of the planning group that you want to make visible.

The Planning Group Accounts view appears.

4 In the Groups form, click Activate.

NOTE: To see whether all team members from the planning group member accounts have been added to the planning group team, click the control in the Account Team field. The Account Team Members dialog box displays all members of the planning group team, including all team members from the newly added member accounts. Every time you add a new account, click the Activate button to incrementally update the planning group team without duplicating the records of existing team members.

To remove planning group assortment plan visibility from member accounts' sales teams

1 Navigate to the Groups screen.

2 From the Show drop-down list, select My Planning Groups, if necessary.

3 In the Groups list, click the hyperlink of the planning group from which you would like to remove visibility.

The Planning Group Accounts view appears.

4 In the Groups form, click the DeActivate button.

NOTE: Only those team members who were added to the Planning Group team with the Activate button are removed.

Creating or Revising an Assortment Plan

The first step in creating an assortment plan is to create an assortment plan record.

Follow these guidelines to create assortment plans:

■ Each assortment plan record should contain a single account and a single product catalog.

■ If an account plans to order products from several catalogs, you should create a separate assortment plan record for each catalog.

You can create or revise assortment plans from the Accounts screen, the Assortment screen, or from an existing plan in the Groups screen.

NOTE: If you are creating an assortment plan for an account that is a planning group, the More Info form will contain group-specific fields that display aggregated Group Units, and Group Amounts for the planning group.

To create an assortment plan from the Accounts screen

1 Navigate to the Accounts screen.

2 From the Queries drop-down list, select All Accounts.

3 From the Show drop-down list, select the appropriate filter, if needed.

4 Click the Assortment Profile view tab.

The Account Assortment Planning view appears.

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

Some of the fields in the Assortment Planning list are described in Table 47.

Table 47.   Selected Fields for Assortment Plans

Fields	Comments
Name	Name of this assortment plan.
Revision	Read-only. Indicates the number of times an assortment plan has been revised. When the assortment plan is created, the value is set to 1. With each revision, this value is increased by one.
Plan Number	A unique, system-generated, alphanumeric identification.
Account	If you add an assortment plan using the Accounts screen, this field is automatically populated with the account you selected in the Accounts list, and you can add additional accounts using the dialog box in this field. If you add an assortment plan using the Assortment screen, you add an Account using the dialog box in this field.
Season	This is the season for which the assortment plan is being created. The Pick Season dialog box displays all seasons previously defined by the Siebel marketing administrator.
Catalog	The catalog you select determines which product categories and products are available for inclusion in the assortment plan. The Pick Catalog dialog box displays all catalogs created by the Siebel marketing administrator.
Price List (wholesale)	The price list you select determines the prices for the products you add to the assortment plan. Price lists are created by a Siebel marketing administrator.
Price List (retail)	A price list covering manufacturer's suggested retail prices for each product. Price lists are created by a Siebel marketing administrator.
Created Date	Date assortment is created.
Plan Units	Read-only. The total number of units included for this plan. The value in this field is determined by quantities entered in the Assortments screen > Plan Details view.

Table 47. Selected Fields for Assortment Plans

Fields	Comments
Plan Amount	Read-only. The monetary amount for units included in this plan. The value in this field is determined by quantities entered in the Assortments screen > Plan Details view.
Historical Units	Read-only. The historical unit volume from a prior period. The value in this field is determined by quantities entered in the Assortments screen > Plan Details view.
Historical Amount	Read-only. The historical unit amount from a prior period. The value in this field is determined by quantities entered in the Assortments screen > Plan Details view.
Target Units	Read-only. The total number of units targeted for this plan. The value in this field is determined by quantities entered in the Assortment Plan Categories view.
Target Amount	Read-only. The total dollar value targeted for this plan. The value in this field is determined by quantities entered in the Assortment Plan Categories view.
Variance Units	Read-only. The value is automatically calculated to show the difference between the values in the Planned Units and the Target Units fields.
Variance Amounts	Read-only. The value is automatically calculated to show the difference between the values in the Planned Amount and the Target Amount fields.
Web Publish	Checking this box makes the assortment plan visible to users of Siebel's customer or partner applications.You must also add the appropriate users to the Account Team field for the account record for which the assortment plan was created. The assortment plan will be visible only to employees of the company for which the assortment plan was created. In addition, your partners and customers must be granted access to the application by your Siebel administrator.
Active	A check indicates that the assortment plan is active. If you revise an assortment plan, the active check is automatically removed from the older copy of the plan and applied to the new copy of the plan.

Table 47.   Selected Fields for Assortment Plans

Fields	Comments
Delivery Flow Type	An attribute of delivery flow models that indicates how delivery quantities will be spread among delivery periods. By default, the available choices are Even, Front Load, and Back Load. If you specify a value in this field, the application preselects a delivery flow model of this type. You can change the preselected delivery flow model by picking a model of a different type in the Assortment Plan Detail and Assortment Plan Category views. LOV Type: DEL_FLOW_TYPE
Delivery Period Type	Represents the frequency with which the account you are planning for will receive product shipments from your company, such as weekly or monthly. The value you select is carried down to the category and product level, and can be changed only at the assortment plan level. LOV Type: DEL_PERIOD_TYPE

To create an assortment plan from the Assortments screen

1 Navigate to the Assortments screen.

2 In the Assortment Plans list, add a new record and complete the necessary fields.

See Table 47 on page 323 for descriptions of selected fields.

To revise an assortment plan in the Assortments screen

1 Navigate to the Assortments screen, and select an assortment plan from the list.

2 Click the menu button in the Assortment Plan form and select Revise.

A copy of the assortment plan you selected is created. The active field is checked in the new plan and is cleared in the older plan.

3 Use any of the Assortments views to revise the new plan.

NOTE: The older version of the assortment plan remains available in the event you want to revert to it in the future. To view the older version, clear the check in the Active field from the newer plan and add a check in the Active field of the older plan.

To create an assortment plan based on an existing assortment plan

1 Navigate to the Assortments screen.

2 From the Show drop-down, select My Assortment Plans, if necessary.

3 In the Assortment Plans list, select the assortment plan you want to copy.

4 Click the menu button and select Copy Record.

 A copy of the assortment plan appears in the Assortment Plan list.

5 Complete the necessary fields.

 See Table 47 on page 323 for descriptions of selected fields.

To create or modify an assortment plan for a planning group

1 Navigate to the Assortments screen.

2 In the Assortment Plans list, add a new record and complete the necessary fields.

 See Table 47 on page 323 for descriptions of selected fields.

Forms showing information about a planning group contain group-specific fields with information about aggregated amounts for the planning group. For example, if a planning group has 12 member accounts, the Group Plan Units field displays a value that reflects the total units for the 12 member accounts.

For information on adding planning groups, see "Adding or Modifying a Planning Group" on page 319.

Selecting Categories for an Assortment Plan

After creating an assortment plan record, your next step is to select product categories. Select product categories by browsing the categories contained in the product catalog you selected for the assortment plan and flagging the categories whose products you want to include in the plan. Product catalogs can be constructed to contain multiple levels of categories, and products can be added to a category at any level in this hierarchy. Therefore, you will need to browse through the entire catalog hierarchy to see all the products available for inclusion in the assortment plan.

To browse categories and products for an assortment plan

1 Navigate to the Assortments screen, and select an assortment plan from the list.

2 Click the Categories view tab.

The first-level categories of this assortment plan's product catalog are displayed in the Categories list. If these categories contain products, they are displayed in the Products list below it. If these categories contain subcategories, the category name is a hyperlink.

3 Click the Category Name hyperlink of a category record to navigate downward in the catalog hierarchy.

Any subcategories contained in the category you drilled down on are now displayed in the Categories list, and any products belonging to the highlighted subcategory are displayed in the Products list below it.

4 Select each subcategory in the Categories list to display the products it contains in the Products list.

5 Click the Categories list menu button and select Go Up... to browse upward through the hierarchy of categories.

To add categories and associated products to an assortment plan

1 Navigate to the Assortments screen, and select an assortment plan from the list.

2 Click the Categories view tab.

The first-level categories of this assortment plan's product catalog are displayed in the Categories list. If these categories contain products, they are displayed in the Product list below it. In the Category list, select a single category or subcategory and click in the Plan field to place a check in the column. Click Select All to select every category or subcategory record displayed in the Subcategories form.

3 Browse through all the subcategories for the assortment plan and repeat Step for each category or subcategory you want to add to the assortment plan.

4 Click Create Detail.

All the categories and subcategories you selected (by placing a check in the Plan column) at each level of the category hierarchy, and the associated products for those categories and subcategories, are added to the assortment plan.

NOTE: If you place a check in the Plan field of a subcategory, the Plan field of its parent category is also selected. The parent category's plan field cannot be deselected unless the subcategory's Plan field is deselected.

Entering Category Targets

After adding categories and subcategories to an assortment plan, you have the option to enter *target units* (numbers of products) and *target amounts* (monetary amounts) for the categories you have selected. Because these two values do not necessarily correlate from season to season and year to year, they are tracked separately. Targets are added at the category and subcategory level, and are automatically rolled up to the target level.

The targets you enter serve as goals to work toward in each category as you continue to work with your customer to finalize the plan units for each product under these categories. After the assortment plan has been approved by the customer, you can compare the target units and target amounts with the plan units and plan amounts. The difference between these values is automatically calculated and displayed in the Variance Units and Variance Amounts fields in the Assortment Plan form. Variance Units show the difference between a manager's Target and a key account manager's Plan.

To add target units to an assortment plan

1 Navigate to the Assortments screen and from the list select an assortment plan.

2 Click the Category Targets view tab.

3 From the Category Targets drop-down list, select Target Units.

The Category Targets list appears, with all the categories selected for this assortment plan displayed.

4 Click on the Category Name hyperlink if you want to navigate to a subcategory.

5 From the Category Targets list, select a category record, and click in the Spread column so that a check mark appears.

6 Enter a quantity in the Target Units field of the same record.

The total number of target units for the assortment plan is automatically updated and displayed in the Target Units field in the Assortment Plan form.

7 Select a delivery flow type for the same record if you want to change the default selection for that category.

Delivery flow types are created at the corporate level by an administrator. To create account-specific delivery flows, see "To create account-specific delivery flow models" on page 336.

8 Repeat Step 5 on page 329 through Step 7 on page 329 for every category or subcategory for which you want to add targets units.

> **NOTE:** When a category hierarchy is present, the Category Name will be hyperlinked in the Categories view. To navigate down the hierarchy, drill down on the Category Name in the Categories view. To navigate up the hierarchy, select "Go Up..." from the Categories list menu, or click the "Go Up..." button in the Category Targets view.

9 Click the Spread Quantity button in the Category Targets list if you want to spread the target units you entered across delivery periods.

Each delivery period in the season for which you are planning is displayed as a column in the Category Targets list. The target units you entered for each category are calculated based on the delivery flow models previously set up, and the results are displayed in the delivery period columns. You can update these delivery quantities.

To add target amounts to an assortment plan

1 Navigate to the Assortments screen and from the list select an assortment plan.

2 Click the Category Targets view tab.

3 From the Category Targets drop-down list, select Target Amounts.

4 Click on the Category Name hyperlink if you want to navigate to a subcategory.

5 From the Category Targets list, select a category record, and click in the Spread column so that a check mark appears.

6 Enter a quantity in the Target Amount field of the same record.

The total target amount for the assortment plan is automatically updated and displayed in the Target Amount field in the Assortment Plan form.

7 Select a delivery flow type for the same record if you want to change the default selection for that category.

8 Repeat Step 5 on page 329 through Step 7 on page 329 for every category or subcategory for which you want to add targets amounts.

NOTE: When a category hierarchy is present, the Category Name will be hyperlinked in the Categories view. To navigate down the hierarchy, drill down on the Category Name in the Categories view. To navigate up the hierarchy, select "Go Up..." from the Categories list menu, or click the "Go Up..." button in the Category Targets view.

Adding Product Details to Assortment Plans

After adding categories and, optionally, adding targets, the next step in creating an assortment plan is to add detail information to the products in each category. You can make the following product detail changes:

■ Enter total quantities for each product and spread those quantities across the delivery periods for the season in which you are planning

■ Remove products from the assortment plan

■ Apply new price lists to some or all products

■ Check whether products in an account's assortment plans are already being planned through a buying group the account belongs to. This allows you to avoid duplicate ordering

 For information about buying groups, see Chapter 5, "Product Distribution."

To add product units to an assortment plan

1 Navigate to the Assortments screen and select the assortment plan to which you want to add products.

2 Click the Categories view tab, or drill down on the assortment plan's name hyperlink.

 The Assortment Plan Categories view appears.

3 In the Categories list, select a category or subcategory.

> **NOTE:** When a category hierarchy is present, the Category Name will be hyperlinked in the Categories view. To navigate down the hierarchy, drill down on the Category Name in the Categories view. To navigate up the hierarchy, select "Go Up..." from the Categories list menu, or click the "Go Up..." button in the Category Targets view.

4 Click the Plan Details view tab.

The Plan Details list appears, with the Assortment Plan Category form above it.

5 From the Plan Details view drop-down, select Plan Units.

6 Complete the Plan Quantity field of each product you wish to include in the assortment plan.

> **NOTE:** The number you enter in the Plan Quantity field represents the quantity of one product that a customer plans to order during the season for which the assortment plan is being created.

7 If you want to delete all product records with a Plan Unit of 0 from the product list, complete the following steps:

   a From the Plan Details list drop-down, select Reprice.

   b Click the Trim button.

   c From the Plan Details list drop-down, select Plan Unit to restore the original view.

8 Click in the Spread column of every product for which you wish to spread quantities across delivery periods, so that a check mark appears in the field.

9 Edit the Delivery Spread field of each product as necessary.

10 Click Spread Quantity.

Each delivery period in the season for which you are planning is displayed as a column in the Products list. The Plan Units values you entered for each product are calculated based on the selected delivery flow model, and the results are displayed in the delivery period columns.

New columns appear for each delivery period in the season. Delivery quantities are displayed for each product record in which you entered a Plan Quantity amount.

11 Repeat Step 2 on page 331 through Step 10 for each category whose products you are including in the assortment plan.

To change a delivery period quantity for a product

■ Click in the field displaying the delivery period quantity you wish to change and enter the new quantity.

To change product prices

1 Navigate to the Assortments screen and select the assortment plan for which you want to change prices.

2 Click the More Info view tab.

3 In the More Info form, select a new price list.

4 Click in the Categories view tab, and select a category or subcategory whose products you want to reprice.

> **NOTE:** When a category hierarchy is present, the Category Name will be hyperlinked in the Categories view. To navigate down the hierarchy, drill down on the Category Name in the Categories view. To navigate up the hierarchy, select "Go Up..." from the Categories list menu, or click the "Go Up..." button in the Category Targets view.

5 Click the Plan Details view tab.

The Plan Details list appears, with the Assortment Plan Category form above it.

6 From the Plan Details list drop-down, select Reprice.

7 Complete one of the following steps:

- From the Plan Details view menu drop-down, select Reprice to change the price of the selected products.

- From the Plan Details view menu drop-down, select Reprice All to change the prices for all products displayed.

The prices for the products you selected are updated to the prices specified in the new price list.

To find out whether products are being ordered through a buying group

- Click the Check 3rd Party button in the Assortment Plan Category form.

If a product is being ordered through a buying group that the account belongs to, a check mark appears in the 3rd Party field in the Plan Details list with Plan Units selected from the drop-down list.

For more information about Buying Groups, see Chapter 5, "Product Distribution."

To modify additional assortment plan details

■ Edit the fields in a record.

NOTE: You can edit many of the fields in the Assortment Plan Detail view that are used to specify product units and monetary amounts. Access these fields by selecting from the Show drop-down list. When you edit these fields, the total product units or monetary amounts for the plan are updated to reflect the changes you made. Total product units and monetary values for an assortment plan are displayed in other Assortment Planning views, such as the Assortment Plan Categories view and the My Assortments view. Table 48 describes the fields in the Assortment Plan Detail view and their behavior.

Table 48.   Selected Fields in the Assortment Plan Detail View

Field	Comments
Target Units	Target unit volume for a particular product.
	Caution. If you enter target quantities in the Assortment Plan Detail view, this will trigger a rollup of target units to the category level. Category targets entered previously will be overwritten.
Target Amount	Target amount volume for a particular product.
	Caution. If you enter target amounts in the Assortment Plan Detail view, this will trigger a rollup of target amounts to the category level. Category targets entered previously will be overwritten.
Historical Units	The historical unit volume from an earlier period. This field can be edited in the Product list. Aggregate totals are displayed in this field in the Assortment Plan Category form.
Historical Amounts	The historical dollar amount generated from an earlier period. This field can be edited in the Product list. Aggregate totals are displayed in this field in the Assortment Plan Category form.
Unit Variance	Appears in the Assortment Plan Category form. The value is automatically calculated to show the difference between the values in the Actual Units and Target Units fields.
Amount Variance	Appears in the Assortment Plan Category form. The value is automatically calculated to show the difference between the values in the Actual Amount and Target Amount fields.

Creating Account-Specific Delivery Flow Models

Occasionally, a customer may request a delivery pattern that cannot be accommodated by any of the corporate delivery flow models the administrator has created. In these situations, account managers or administrators can create account-specific delivery flow models.

For more complete information on delivery flow models see "Corporate Delivery Flow Models" on page 315.

To create account-specific delivery flow models

1 Navigate to the Accounts screen.

2 From the Queries drop-down list, select All Accounts.

3 Select the account for which you are creating the delivery flow model.

4 Click the Assortment Profile view tab.

5 From the Assortment list Show drop-down, select Delivery Flow.

   The Account Delivery Flow view appears.

6 In the Delivery Flow Model list, click New to add a record, complete the necessary fields, and click Save.

7 In the Algorithm list, edit the values in the Weighting field for each delivery date to represent the delivery pattern you want to specify for this delivery flow model.

   NOTE: The total of all the values in the Weighting column is automatically calculated. The total must be 100 to create a useful corporate delivery flow model.

8 Select the algorithms you wish to commit to the database and click Save, or click Save All to save all of the algorithms on the list.

Creating a Consolidated Assortment Plan

You can consolidate multiple assortment plans into one consolidated assortment plan. Typically, this capability is used by a manager to consolidate the planned product units and amounts of assortment plans created by the manager's subordinates. Any of the plans displayed in the My Team's Assortment Plans view can be consolidated.

To create a consolidated assortment plan

1 Navigate to the Assortments screen.

2 From the Show drop-down list, select My Team's Assortment Plans.

3 Click the Assortment Plan Consolidation view tab.

4 In the Consolidated Assortment Plans list add a record and complete the necessary fields.

See Table 47 on page 323 for descriptions of select fields.

5 In the Assortment Plans Consolidation list, click New.

6 In the Add Assortment Plan dialog box, select one or more assortment plans you want to consolidate, and click OK.

Line items from the assortment plans you added are combined in the consolidated assortment plan.

7 In the Consolidated Assortment Plans list, click on the hyperlink in the Name field to view the consolidated line item products.

Making Assortment Plans Visible on the Web

Through the use of Siebel's customer and partner applications, such as Siebel eChannel for Apparel & Footwear, you can make assortment plans visible on the Web. To do this, you must add customers, partners or end-users as Account Team members for the appropriate accounts, and you must also approve assortment plans for presentation on the Web. By completing these steps, you can decide which assortment plans are visible to each user.

For details on allowing customers and partners access to Assortment Plans over the Internet, see *Customer and Partner Applications Administration Guide for Industry Applications*.

To make assortment plans visible on the Web

1 Navigate to the Assortments screen.

2 From the Show drop-down list, select the appropriate filter, if necessary, and select the assortment plan you want to make visible

3 Click the More Info tab, and then click the Show More button to see all the fields in the form.

4 Click in the Web Publish field.

Complex Quotes and Orders 15

This chapter documents the procedures end users will need to create complex quotes and orders in the Siebel Consumer Sector application:

■ Create complex quotes with multiple ship-to accounts, delivery dates, and line item details.

■ Convert quotes to orders, and review order line item details.

■ Submit orders to back office applications.

About Complex Quotes and Orders

Siebel Consumer Sector applications automate the process of creating quotes and orders that meet the needs of industries with more complex products or product delivery needs, for example, the apparel and footwear industry.

You can create a single quote for the product needs of multiple retail outlets within a company. A quote can include multiple delivery dates and ship-to accounts (addresses). Size-specific quantities can be automatically allocated based on pre-defined size distribution models. You can edit these quantities to suit the needs of individual accounts.

After a quote has been assembled and approved by the necessary parties (for example, the buyer for your customer and your manager), you can convert it to an order that can be submitted to back office applications for order fulfillment.

If your company uses one of the Siebel Consumer Sector customer and partner applications, buyers for your customer companies can generate quotes and convert them to orders as well. This chapter covers the procedures for generating quotes and converting them to orders in all Siebel applications. For information on allowing customers and partners access to the functionality, see *Customer and Partner Applications Administration Guide for Industry Applications*.

Business Scenario

This business scenario for complex quotes and orders is performed by administrators and retail sales representatives. Your company may follow a different workflow according to its business requirements.

The retail sales representative of an apparel and footwear company needs to create a quote for a customer. She begins by selecting an account and then creating a new quote record for that account. Since this quote covers multiple retail outlets, she chooses to select a headquarters account for the group of outlets.

After creating the quote record, the sales representative adds ship-to accounts for each retail outlet that will receive product shipments and delivery dates. Next she adds products separately for each ship-to account, and generates product quantities. Quantities are generated at two levels: the total quantity to be delivered on each delivery date, and a break-down of quantities by size. She also could have automated the process of entering product quantities by using predefined size distributions, which specify proportional quantities for all the sizes available for a product. After total and size-specific quantities were generated, she could adjust them manually, if necessary.

Once the retail sales representative is satisfied with the quote, she saves it for review by her manager and the buyer she is working with. When the necessary parties approve the quote, she converts it to an order. Finally, she submits the order to the back office application her company has integrated with the Consumer Sector application for order fulfillment.

Example Workflow for Complex Quotes and Orders

This example workflow for complex quotes and orders is performed by administrators and end users such as sales representatives or buyers. Your company may follow a different workflow according to its business requirements.

Administrator Procedures

The complex quotes and orders functionality does not have any administrator procedures specific to it. However, the following procedures are required before end users can create complex quotes and orders.

1 **Create size scales.** For information see "Setting Up Sizes, Size Scales, and Size Distributions" on page 95.

2 **Create size distributions.** For information see "Setting Up Sizes, Size Scales, and Size Distributions" on page 95.

3 **Create price lists.** For information see *Pricing Administration Guide.*

End-User Procedures

End users should perform the following tasks in the order shown below.

1 **Create a quote.** For detailed information, see "Creating Quotes" on page 343.

2 **Add ship-To addresses and delivery dates.** For detailed information, see "Adding Ship-To Accounts and Delivery Dates" on page 345."

3 **Add products.** For detailed information, see "Adding Products" on page 346.

4 **Determine size-specific quantities for each ship-to address.** For detailed information, see "Generating and Modifying Size Quantities" on page 347.

5 **Convert a quote to an order.** For detailed information, see "Converting Quotes to Orders" on page 349.

6 **Review Order Line Items.** For detailed information, see "Reviewing Order Line Items and Size Quantities" on page 349.

7 **Submit order to back office system.** For detailed information, see "Submitting Orders to Back Office Systems" on page 351.

End-User Procedures

This section provides instructions for the following procedures:

Creating Quotes

You begin the quote creation process by adding a new quote record to an account. If you are creating a quote for a group of retail outlets, you would typically add the quote to a headquarters or key account.

To add a quote to an account

1 Navigate to the Accounts screen.

2 From the Queries drop-down choose All Accounts.

3 From the Show drop-down, select the appropriate filter.

4 Select the account to which you want to add a quote.

5 Click the Quotes view tab.

6 In the Quotes list add a new record and complete the necessary fields.

Some of the fields in the Quotes list are described in Table 49.

Table 49.   Some Fields in the Quotes List

Fields	Comments
Quote #	A unique, system generated identification number.
Revision	The number of times the quote has been revised.
Name	The name of the quote.
Opportunity	The opportunity associated with the account.
Account	The account for which the quote was created.
Account #	The identification number of the account for which the quote was created.
Site	Indicates the location of the account.
Status	The status of the quote; for example, Accepted or In Progress. LOV Type: QUOTE_STATUS
Active	Indicates whether the quote is active.
Price List	The price list you select helps determine the price charged for each product you include in the quote.
Discount	A percentage discount to be applied to the product prices specified in the price selected for the quote.
Sales Rep	The name of the employee to whom the quote is assigned.

Adding Ship-To Accounts and Delivery Dates

You can set up multiple shipping addresses by associating ship-to accounts to the quote. You can then apply delivery dates for each ship-to account.

To add shipping addresses to a quote

1 Navigate to the Quotes screen.

2 From the Show drop-down, select the appropriate filter, if necessary.

3 In the Quotes list, select the quote you are preparing.

4 Click the Shipments view tab.

5 In the Ship To list, Click New.

The Add Accounts dialog box appears.

6 From the Add Accounts dialog box, select one or more ship-to accounts, and click OK.

To set up delivery dates for each ship-to account

1 Navigate to the Quotes screen.

2 From the Show drop-down, select the appropriate filter, if necessary.

3 In the Quotes list, select the quote you are preparing.

4 Click the Shipments view tab.

5 In the Ship To list, select the ship-to account for which you want to set up a delivery date.

6 In the Delivery list, click New.

7 Enter dates in the Delivery Date field and Last Cancel Date field (optional).

NOTE: The Last Cancel Date field (optional) indicates the last date on which the retailer can receive the order before the order is cancelled.

8 Repeat Step 5 and Step 7 to set up additional delivery dates.

Adding Products

You can specify a unique group of products for each ship-to account in a quote.

To add products to ship-to accounts

1 Navigate to the Quotes screen.

2 From the Show drop-down, select the appropriate filter, if necessary.

3 In the Quotes list, select a quote.

> **NOTE:** The quote you select must have a price list selected. If a price list has not been selected, you cannot perform a product search.

4 Click the Product Search view tab.

The Quote Product Search view appears, with (from top to bottom), a Quote Header form, a Ship To list, a Search Criteria form, and a Product list.

5 In the Ship To list, select the shipping address to which you want to add products.

6 In the Search Criteria form, click New Query.

7 Enter search criteria in one or more fields and click Search.

The product records that conform to the search criteria you entered appear in the Product list.

8 Click the Search Criteria form menu button, select Refine Query, and repeat Step 7 to narrow the search of the products returned by your previous query.

9 In the Product list, select the one or more product records you would like to add to the quote and click Add to Quote.

The Line Item Detail view appears. The products you added are displayed in the Product list.

10 Repeat Step 4 through Step 9 to add products to other ship-to accounts.

Generating and Modifying Size Quantities

Once you have established ship-to accounts and delivery dates for a quote, and added products to each ship-to account, you can specify size-specific quantities for the products associated with each ship-to account. To do this you select a size distribution and a multiplier for each product.

Size distributions are set up by an administrator in your company to facilitate the allocation of appropriate product and size quantities. They contain quantities for each size within a product type, and are typically created to reflect consumption rates for each size. For example, a men's casual shirt size distribution might specify the following size quantities: two smalls, three mediums, four larges, and two extra larges. The total number of products for one set of men's casual shirts for this size distribution would be 11. Table 50 shows the product quantities that would result from using the size distribution described above with a multiplier of three.

Table 50. Size Distribution Example

Sizes	Size Distribution Quantities	Quantities Generated Using a Multiplier of 3
Small	2	6
Medium	3	9
Large	4	12
Extra Large	2	6
Totals	11	33

When you generate size quantities, these quantities are repeated for every delivery date associated with the quote. Considering the example given above, if the quote you are preparing has three delivery dates, then a total of 99 units would be added to the quote you are preparing.

Once you have generated size quantities, you can make adjustments by editing individual size quantities for each delivery date.

The Line Item Detail view displays a quote and the shipping addresses and products associated with it. You can use this view to generate size-specific quantities for each product in a quote.

To generate product and size quantities

1 Navigate to the Quotes screen.

2 From the Show drop-down, select the appropriate filter, if necessary.

3 In the Quotes list, select a quote.

4 Click the Line Item Detail view tab.

5 In the Ship To list select the ship-to account for which to generate product and size quantities.

6 In the Product list click New, or select a Product previously added to the Quote from the Product Search view.

7 In the Pick Product dialog box, select a product for which you want to generate size quantities, and click OK.

8 Use the picklist in the Size Distribution field to select a size distribution.

> **NOTE:** Administrators can generate any size distribution that will apply throughout the organization. End users can set up account-specific size distributions that are applicable only to their specific accounts.

9 Enter a number in the Multiplier field.

10 Repeat Step 6 through Step 9 for each product listed in the Product list.

11 From the Product list menu, select Fill Sizes All to generate product and size quantities for every product listed in the Product list, or select one product in the Product list and choose Fill Sizes to generate product and size quantities for one product.

The Quantity Requested field of the Product list displays the total quantity for each product.

Quantities for each delivery date and product size combination are displayed in the Sizes x Dates list. You can switch between Sizes x Dates display and Dates x Sizes by using the drop-down on the list.

To make changes to size quantities

■ Change a size quantity by selecting a size quantity field in the Sizes x Dates list and entering a new quantity.

Converting Quotes to Orders

After you have assembled a complete quote containing ship-to accounts, delivery dates, products, and product quantities, you can convert it into an order.

To convert a quote to an order

1 Navigate to the Quotes screen.

2 From the Show drop-down, select the appropriate filter, if necessary.

3 In the Quotes list, select a quote.

4 Click the Orders view tab.

5 In the Orders list click Auto Order.

The quote is converted to an order; it appears in the Orders list.

Reviewing Order Line Items and Size Quantities

When you convert a quote to an order, line items are created for each unique combination of a product, a ship-to account, and a delivery date. In addition, line item size quantity records are created for each size associated with an order line item. These line items are displayed in the Line Item Detail view.

To review line items for an order

1 Navigate to the Orders screen.

The All Sales Orders view appears.

2 From the Queries drop-down make a selection, if necessary.

3 From the Show drop-down list, select the appropriate filter.

4 Select the order you want to review and click the Order # hyperlink.

The Line Items view appears. Line items for the order are displayed in the Line Items list.

CAUTION: Do not make changes to orders in this view. If you need to revise an order, you should delete the order, return to the quote from which the order was created, and revise the quote. You can then convert the revised quote to an order.

To review line item detail records for an order

1 Navigate to the Orders screen.

The All Sales Orders view appears.

2 From the Queries drop-down list, make a selection, if necessary.

3 From the Show drop-down list, select the appropriate filter.

4 Select the order you want to review and click the Order # hyperlink.

The Line Items view appears. Line items for the order are displayed in the Line Items list.

5 In the Line Items list, click on the Part Number hyperlink of the line item for which you want to review size information.

The Line Item Detail view appears. Size information for the selected line item appears in the Line Item Detail list.

CAUTION: Do not make changes to orders in this view. If you need to revise an order, you should delete the order, return to the quote from which the order was created, and revise the quote. You can then convert the revised quote to an order.

Submitting Orders to Back Office Systems

Orders created in Siebel Consumer Sector applications can be submitted to back office database applications used for order fulfillment. To perform this action you must integrate your Siebel database and your back office database so the two applications can exchange order-related data.

For more information, see *Siebel Enterprise Integration Manager Administration Guide*.

Reports A

This chapter describes reports that are specific to Siebel Consumer Sector applications.

Siebel Consumer Sector Reports

Table 51 lists the reports that are specific to the Siebel Consumer Sector applications.

NOTE: For more information about reports, including how to customize, enhance, and create Siebel reports, see *Siebel Reports Administration Guide*.

Table 51.   Reports in Consumer Sector Applications

Menu Text	Name	Business Component
Account Plan Promotion Deal Sheet	CG Account Plan Promotion Deal Sheet	Account
Account Visits by Salesperson	CG Account Visits by Salesperson	Account
Accounts by Route	CG Accounts by Route	CPG Routes
Authorized Product List	CG Authorized Product List	Account
Authorized Product List	CG Authorized Product in Source of Supply	Account
Fund Balance and Allocation Report	CG Fund Balance and Allocation Report	CPG Fund
Objective Account Status	CG Objective Account Status	Retail Objective
Retail/Account Profile Report	CG Account Profile Report	Account

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