# SIEBEL eBusiness 7

## SIEBEL eSALES ADMINISTRATION GUIDE ADDENDUM FOR INDUSTRY APPLICATIONS

*VERSION 7.5*

12-BD6PYF

*NOVEMBER 2002*

# Contents

## Introduction

## Chapter 1.   Siebel eSales for Financial Services

## Chapter 2.   Siebel eSales for CME

# Contents

# Introduction

This guide describes only those features of Siebel eSales for Siebel Industry Applications that are different from the features of Siebel eSales.

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

**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.

# Supported Applications

Siebel eSales is supported for:

■ Siebel Consumer Sector

■ Siebel Life Sciences

■ Siebel eAutomotive

■ Siebel Communications, Media, and Energy (CME)

■ Siebel Financial Services

The features of Siebel Consumer Sector, Siebel Life Sciences, and Siebel eAutomotive are the same as the features of Siebel eSales. Siebel eSales for CME and Siebel eSales for Financial Services have different application objects and additional features that are exposed only to users who have the appropriate license keys.

Siebel eSales for Siebel Industry Applications uses the application objects listed in Table 1.

**Table 1.   Application Objects**

| Application Object | Product | Documentation |
|---|---|---|
| Siebel eSales | Siebel Consumer Sector | *Siebel eSales Administration Guide* |
| | Siebel Life Sciences | |
| | Siebel eAutomotive | |
| Siebel eSales for CME | Siebel Communications, Media, and Energy | Chapter 1 of this guide |
| Siebel FINS eSales | Siebel Financial Services | Chapter 2 of this guide |

# Features Summary

Siebel eSales for Siebel Industry Applications allows business-to-business and business-to-consumer selling over the Web. Its features include:

- Multimedia product catalogs

- Product search tools including full-text search and parametric search based on product attributes

- User-specified product comparison

- Distributed catalog administration allowing multiple-vendor catalogs

- Customer profiling and personalization using Siebel Personalization

- Customizable order management processes using Siebel Business Process Designer

- Support for recurring and nonrecurring charges

- Flexible account management

- Online Shopping Carts, quotes, and orders:

  - Favorites lists of items allowing customers to find the items and buy them again

  - Quote templates for faster ordering

  - Order approval processes

  - Streamlined checkout processes

  - Integration with third-party taxation and payment processing applications

- Optional modules:

  - Siebel eAdvisor for Web-based needs analysis

  - Siebel eConfigurator for Web-based product configuration

  - Siebel ePricer for one-to-one pricing and promotions using custom price lists

  - Complex order processing using Siebel Business Process Designer

# Additional Resources

This book is meant to be used as an addendum to the *Siebel eSales Administration Guide*.

If you are working with Siebel Communications, Media, and Energy, see the following books on the *Siebel Bookshelf* for related information.

■ *Siebel Order Management Guide Addendum for Industry Applications*

■ *Siebel eEnergy Guide*

■ *Siebel eCommunications Guide*

# How This Guide Is Organized

This book includes chapters for:

■ Siebel eSales for Financial Services

■ Siebel eSales for Communications, Media, and Energy

# Revision History

*Siebel eSales Administration Guide Addendum for Industry Applications*, Version 7.5

# Siebel eSales for Financial Services  1

Siebel eSales for Financial Services is a customized form of Siebel eSales that is designed to meet the needs of specific sectors of the finance industry. It includes a Web site that:

■ Allows financial institutions to market their products to customers.

■ Provides a way for customers to apply for those products over the Web.

# Supported Industry Sectors

Siebel eSales for Financial Services supports the following industry sectors:

■ Retail finance (banking)

■ Healthcare

■ Institutional finance

■ Insurance

## Differences in the Siebel eSales for Financial Services Web Site

Financial products are qualitatively different from products sold by other industries. When customers order products, such as a computer or a high-speed Internet service, over the Web, they can complete the transaction before they leave the Web site. In contrast, customers may not order a financial product, such as a mortgage or a new life insurance policy, and complete the transaction in the same Web session. Instead, they apply for a financial product over the Web and include the necessary information in their application. The financial institution evaluates, and possibly rejects, the application. Typically, the financial institution follows up with the customer in some way before granting the customer's application.

The Siebel eSales for Financial Services Web site has a number of differences compared to the Siebel eSales Web site, which reflect the differences in the types of products that are marketed. In the Siebel eSales for Financial Services Web site:

■ The Home screen is replaced by the Products screen.

■ The Catalog screen is removed.

■ The Auctions screen is removed.

■ The Applications screen is an addition.

■ The Tools screen is an addition.

# The Products Screen

The Home screen of the Siebel eSales Web site is replaced by the Products screen of the Siebel eSales for Financial Services Web site (see Figure 1).
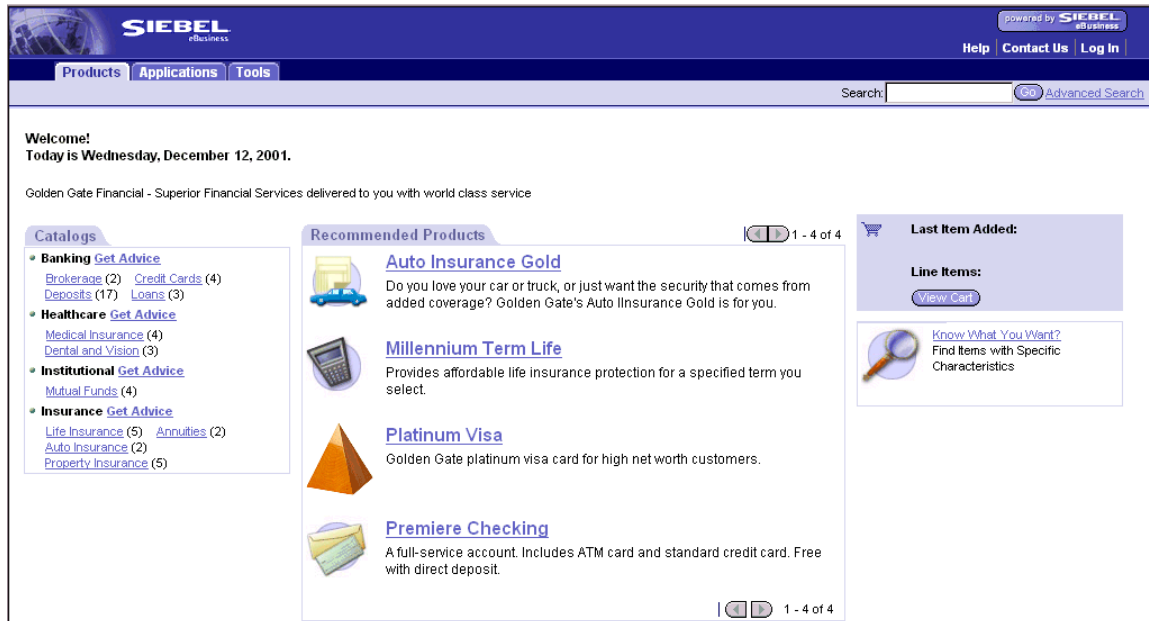


**Figure 1.   Products Screen**

The Need Advice and Quick Add applets are not used in the Siebel eSales for Financial Services Web site.

Customers using a Siebel eSales Web site access product catalogs through the Catalog screen, but customers using a Siebel eSales for Financial Services Web site access them through the Catalogs applet of the Products screen. Siebel eSales for Financial Services contains four catalogs: Banking, Healthcare, Institutional, and Insurance (see Figure 1). Each product catalog has a Get Advice hyperlink that launches a unique eAdvisor application. The customer accesses the product catalog at the category level by clicking a hyperlink under one of the industry sector headings.

When the customer clicks a hyperlink in the Recommended Products applet, or drills down on a product catalog hyperlink, the product detail view for the selected product appears. In this view, shown in Figure 2, the Add to Cart button of the Siebel eSales Web site is replaced by the Add to Application button of the Siebel eSales for Financial Services Web site.

Add to Application button



**Figure 2.  Product Detail View**

When the customer clicks the Add to Application button:

■ A quote record is created in the Quotes list of the Quotes screen of Siebel Financial Services employee applications.

■ A record is created in the My Applications list of the Web site's Applications screen. For more information about the Applications screen, see "The Applications Screen" on page 14.

The details of the product are displayed in the Financial Attributes list of the product details view (see Figure 2). Financial service products may also be assigned dynamic attributes, which are used when the customer performs a parametric search.

For more information about dynamic attributes, see *Product Administration Guide*.

For more information about parametric searches, see *Siebel eSales Administration Guide*.

# The Applications Screen

The Applications screen is specific to the Siebel eSales for Financial Services Web site. This screen is accessed by clicking either the Applications screen tab or the View Cart button on the Products screen. This screen is the Web site's shopping cart.

The My Applications list displays the records that were created when the customer clicked the Add to Application button in the Products screen. The records represent the list of products that the customer is interested in applying for.

The Apply Now button is similar in function to the Check Out button of the Catalog screen of the Siebel eSales Web site. Clicking Apply Now:

■ Launches the workflow process for user authentication.

■ Invokes the Universal Application SmartScript.

■ Creates a record in the Applications list of the Applications screen of the Siebel Financial Services employee application, and associates it with the quote record.

■ Removes the records from the My Applications list.

Customers can view their applications that are in progress by clicking the Status button.

# The Tools Screen

The Siebel eSales for Financial Services Web site includes a Tools screen (see Figure 3). Customers can use the Tools screen to obtain financial planning advice, perform financial planning calculations, and learn about products that might be useful to them.



**Figure 3.    Tools Screen**

## Intentions eAdvisor, Life Events eAdvisor, and Special Offers Applets

The Intentions eAdvisor, Life Events eAdvisor, and Special Offers applets include hyperlinks that invoke marketing campaign Web offers. When the customer clicks a hyperlink, the system checks to see whether the offer has a SmartScript associated with it and, if so, invokes the SmartScript. If there is no associated SmartScript, a Web offer template will be displayed. You are required to associate either a SmartScript or a Web offer template with a hyperlink in these applets.

## Viewing a List of Web Offers

You can view a list of the Web offers in the standard, out-of-the-box application that can be invoked from these applets.

### *To view a list of Web offers*

**1** Navigate to the Campaign Administration > Campaigns screen.

**2** In the Campaigns list, select the FINSeSales Promotions record.

> **NOTE:** Marketing administrators at your company will use different names when they create campaign records.

**3** Click the Offers view tab.

This displays a list of offers (see Figure 4).

| Name | Type | Offer Code | Description | Product | Activation | Expi |
|------|------|-----------|-------------|---------|-----------|------|
| Getting Married? | Web - Life Events | 1-7EJ7 | Looking to buy an engagement ring? How do you pay | | 11/8/2001 | |
| Having a Baby? | Web - Life Events | 1-7EJF | Having a baby is one of the most financially challengi | | 11/8/2001 | |
| Moving to a New City? | Web - Intentions | 1-7EJM | Moving to a new city? Golden Gate Financial can help | Premiere Checking | | |
| Looking to Retire Early? | Web - Intentions | 1-7EJQ | Looking to retire early? Golden Gate can help you pla | Millennium Term Life | | |
| Health Classes in 2001 | Web - Announceme | 1-2J7H | Asthma Management, Travel Abroad and Cancer Mgr | | | |
| Golden Gate Insurance News | Web - Announceme | 1-GMRW | Golden Gate News on Insurance | | | |
| A Great Insurance offer for your sports car! | Web | 1-9AQ9 | A special insurance offer for sports car owners. | Auto Insurance Gold | 12/4/2001 | 12/21/20 |

**Figure 4.  Offers List**

The value in the Type field determines which of the three applets the offer appears in. Use the following applet descriptions to help decide where to place your Web offers:

■ **Intentions eAdvisor.** Use this applet to help customers choose products that are relevant to changes they may be planning, such as retirement and relocation.

■ **Life Events eAdvisor.** Use this applet to help customers to choose products that are relevant to major life events, such as having a baby, marriage, and graduation.

■ **Special Offers.** Use this applet to display special offers.

# Product eAdvisor Applet

The Product eAdvisor applet also includes hyperlinks that invoke SmartScripts, but these are unrelated to marketing campaigns. Use this applet to help customers choose a specific product when they already know what type of product they are interested in.

## Viewing a List of Product eAdvisor SmartScripts

You can view a list of Product eAdvisor SmartScripts that are available for use in the Web site Tools screen (see Figure 5).

### *To view a list of Product eAdvisor SmartScripts*

■ Navigate to the SmartScript Administration > Scripts screen.

| Name | Type | Active | First Page | Jumping Allowed | Save Session |
|------|------|--------|------------|-----------------|--------------|
| Auto Insurance eAdvisor | Product Advisor | ✔ | PA - Auto Insurance | ✔ | Finished |
| Homeowner's Insurance | Product Advisor | | PA - Homeowner's I | ✔ | Finished |
| Demo Buy a Home Advisor | Product Advisor | | Demo Home Mort | ✔ | Finished |
| Home Equity Loan eAdvisor | Product Advisor | | PA - Home Equity Lo | ✔ | Finished |
| Buy a Car eAdvisor | Product Advisor | | LE - Car Loan | ✔ | Finished |
| Life Insurance eAdvisor | Product Advisor | | PA - LI Introduction | ✔ | Finished |
| Merchant Services eAdvisor | Product Advisor | | PA - Merchant Serv | ✔ | Finished |
| Business Loans eAdvisor | Product Advisor | | PA - Bus. Loans | ✔ | Finished |
| Consumer Deposit Accounts eAdvisor | Product Advisor | ✔ | PA - Cons. Deposit | ✔ | Finished |
| Consumer Credit Cards eAdvisor | Product Advisor | | PA - Cons. Credit Ca | ✔ | Finished |
| Business Deposit eAdvisor | Product Advisor | | PA - Bus. Deposit A | ✔ | Finished |
| Personal Loan eAdvisor | Product Advisor | | PA - Personal Loan/ | ✔ | Finished |

**Figure 5. Scripts List**

Product Advisor Smartscripts that are also flagged as active are visible in the Product eAdvisor applet on the Tools screen.

## Mortgage eAdvisor Applet

Hyperlinks in the Mortgage eAdvisor applet link to mortgage calculators that allow customers to perform various financial calculations.

# Siebel eSales for CME 2

Siebel eSales for CME (Communications, Media, and Energy) has special features to support the complex orders that are common in these industries. These features affect:

- The Siebel eSales Web site that the customer sees

- The workflows used to capture sales

# Differences in the Siebel eSales Web Site

*Siebel eSales Administration Guide* describes the Siebel eSales Web site that customers see when they access Siebel eSales.

The Siebel eSales customer Web site for communications, media, and energy has a number of differences from the standard Siebel eSales Web site. The most important differences are:

- Support for the complex ordering process used in communications, media, and energy, including multiple price types.

- Support for account management needed by business users in these industries.

- Improved customer usability with additional workflows.

## Support for Complex Ordering Process

In the communications, media, and energy industries, companies provide services to their customers over an extended period of time. Typically, these products and services change over that time. New products and services are added, the attributes of existing products and services are modified, and services are disconnected or moved. These changes correspond to the four types of orders, which are move order, new order, modify order, and disconnect order. These order types are known within the industry as MACD (Move, Add, Change, and Delete).

Siebel eSales for CME has a number of differences to support these sorts of complex orders and the complex bundles of products and services that customers purchase:

- **Modify and disconnect orders.** The user can make changes to or disconnect active service items.

- **Place supplemental orders.** The user can make changes to orders that have not yet been fulfilled.

- **Ungroup products.** The user can make a bulk order and then change individual items in the bulk order.

- **Associate products with assets.** The additional fields Service ID and Service Point ID are unique identification codes for service or hardware.

■ **Multiple price types.** In the energy, media, and communications industries, a service product may have multiple associated price types. They include recurring, nonrecurring, and usage based price types.

In addition, Siebel eSales for CME has changed several views so the process of placing orders is adapted to the communications, media, and energy industries. For example, when a first-time customer is ordering a service, a workflow process is used in combination with modified views to automate the creation of an account and to associate the order with service items.

For more information about complex order processing, and CME-specific workflows and views, see *Complex Order Management Guide for Industry Solutions*.

## Support for Complex Account Hierarchies

In the communications, media, and energy industries, it is common for a single customer to have multiple accounts, representing different types of service at different locations. For example, a customer may have accounts for its electric and gas service at a number of locations.

For this reason, Siebel eCommunications and Siebel eEnergy allow you to define hierarchical accounts and assign them to your customers. For example, you might define a parent account for a customer's business, separate child accounts for each utility service at each of the customer's sites, and a billing account which will aggregate the bills for the service provided at different group of sites. For more information about account hierarchies, see the section about accounts in *Siebel eCommunications Guide* or *Siebel eEnergy Guide*.

### Automatic Account Creation

Because communications, media, and energy services involve a long-term relationship with the customer, Siebel eSales for communications, media, and energy automatically create accounts for first-time buyers of service products who do not have accounts.

### Account Management

Siebel eSales for communications, media, and energy allows established customers to manage their account records.

The current account link provided in the My Account view allows users to access this information. They can use this screen to:

- **Change the current account.** Customers can use the Current Account list at the bottom of the screen to select the account they want to obtain information from or make purchases from.

- **Select the primary account.** Customers can use the Primary Account list at the bottom of the screen to select the primary account.

- **Add new accounts.** Customers can click the Create New Account button to add and enter information about a new account. In addition, customers can use the Parent Account field to create account hierarchies.

- **Add new addresses.** Customers can click the Add button of the Current Account Address list to add new addresses for the current account.

---

NOTE: For security reasons, new addresses must be typed instead of selected from a list of addresses.

---

### Billing and Service Accounts

To support this sort of complex account structure, Siebel eSales for communications, media, and energy has the following added fields:

- **Service Account.** Allows users to associate the service delivery location with a product.

- **Billing Account.** Allows users to associate the billing location with a product.

For information about how these fields are used in account hierarchies, see the section about accounts in *Siebel eCommunications Guide* or *Siebel eEnergy Guide*.

## Differences in Order Workflow Processes

For communications, media, and energy, Siebel eSales for Siebel Industry Solutions uses order management workflows that are different from Siebel eSales, in order to support complex order management. The order management process consists of three major steps:

- Order capture

- Checkout

- Order processing

There are significant differences in the workflows used in all of these steps.

The workflows that Siebel eSales uses for communications, media, and energy are documented in *Complex Order Management Guide for Industry Solutions*.

*Siebel eSales Administration Guide* describes how to modify Siebel eSales order workflow processes, and it documents the default order workflow processes used by Siebel eSales.

## Energy Price Comparison

Siebel eSales for Siebel eEnergy includes an energy pricing calculator that determines the annual cost for services, such as gas or electricity, to existing or prospective customers. It then compares the existing cost against the internal rates that reside in the Siebel database and provides comparative quotes to the customer. After reviewing the quotes, customers can enroll for the service your company offers.

For more information about the price comparison feature, see *Siebel eEnergy Guide*.