SIEBEL eBusiness 7

SIEBEL ORDER MANAGEMENT GUIDE

MIDMARKET EDITION

VERSION 7.5

12-BD6PWV

SEPTEMBER 2002

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Introduction

This guide explains order management for customers using Siebel Quotes, MidMarket Edition or Siebel Orders, MidMarket Edition.

NOTE: All Siebel MidMarket product names include the phrase MidMarket Edition to distinguish this product from other Siebel eBusiness Applications. However, in the interest of brevity, after the first mention of a MidMarket product in this document, the product name will be given in abbreviated form. For example, after Siebel Call Center, MidMarket Edition, has been mentioned once, it will be referred to simply as Siebel Call Center. Such reference to a product using an abbreviated form should be understood as a specific reference to the associated Siebel MidMarket Edition product, and not any other Siebel Systems offering. When contacting Siebel Systems for technical support, sales, or other issues, note the fullname of the product to ensure its proper identification and handling.

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

Call Center Administrators	Persons responsible for setting up and maintaining a call center. Duties include designing and managing Computer Telephony Integration (CTI), SmartScripts, and message broadcasts.
Sales Administrators	Persons responsible for setting up and administering sales within their organization.
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 information in this guide is organized as follows:

- Introduction to order management concepts
  - Chapter 1, "Overview of Order Management"
- Tasks and considerations involved in setting up Siebel Quotes and Siebel Orders
  - Chapter 2, "Setting Up Order Management"
- End-user experience of using order management features
  - Chapter 3, "Working with Quotes"
  - Chapter 4, "Working with Orders"
- Tasks and considerations when integrating Siebel order management modules with back-office and other systems
  - Chapter 5, "Preparing for Integration"

Revision History

Siebel Order Management Guide, MidMarket Edition, Version 7.5

Overview of Order Management 1

This chapter provides a summary of the general order management process and introduces the specific concepts and capabilities available in Siebel Quotes and Siebel Orders. Siebel Orders is available through a license of Siebel Sales, MidMarket Edition, Siebel Service, MidMarket Edition, and Siebel Call Center, MidMarket Edition. Siebel Orders is available through a license of Siebel Sales, MidMarket Edition and Siebel Call Center, MidMarket Edition.

NOTE: Many order management features are available in Siebel eSales and Siebel Partner Relationship Management applications. This book focuses on order management features in employee applications such as Siebel Sales and Siebel Call Center. For details about Siebel eSales and Siebel Partner Relationship Management, see *Siebel eSales Administration Guide, MidMarket Edition* and *Siebel PRM Administration Guide, MidMarket Edition*.

As a prerequisite for understanding order management, you should be familiar with the product administration, pricing administration, and business process management functionalities of your Siebel applications. For information about these topics, see the following books:

- *Product Administration Guide, MidMarket Edition*
- *Pricing Administration Guide, MidMarket Edition*
- *Siebel Business Process Designer Administration Guide, MidMarket Edition*

In addition, as you consider how to best integrate order management into your systems and processes, you may want to refer to the following books:

- *Overview: Siebel eBusiness Application Integration Volume I, MidMarket Edition*
- *Integration Platform Technologies: Siebel eBusiness Application Integration Volume II, MidMarket Edition*
- *Application Services Interface Reference: Siebel eBusiness Application Integration Volume VI, MidMarket Edition*

About Order Management

Siebel Quotes and Siebel Orders provides ordering capabilities for employees such as sales administrators and call center agents to take accurate quotes and orders and to manage orders through the entire lifecycle. Employees can capture, validate, and monitor the quotes and orders. Siebel Quotes and Siebel Orders can be tightly integrated with back-office systems, allowing users to perform tasks such as checking credit. Asset-based ordering activities allow quotes and orders to be created based on a customer's existing assets. Asset-based ordering is particularly useful in supporting companies whose product offerings include complex service products, such as phone services and equipment.

Order management is one component of customer lifecycle management. It allows organizations to attract, engage, sell, and retain customers through the Web as well as through their existing field, call center, and indirect sales channels.

The order management life cycle includes tasks that fall into several groups:

- Preorder functions that can include creating accounts and contacts or helping anonymous customers through the needs-analysis process.
- Order entry functions that can include selecting products and services, capturing quotes and orders, verifying products and pricing, entering shipping, tax, and payment information, and performing a credit check.
- Order monitoring functions that can include providing the customer with order status, notifying the customer that the order has shipped, creating supplemental orders, and monitoring or modifying activities that support the order, such as installation.

Order entry functions are an important part of order management. Within order entry are numerous subtasks, such as creating quotes, converting quotes to orders, recording the items as assets, responding to the customer's requests for additions and changes, and so forth.

Figure 1 shows the overall process of developing an order.

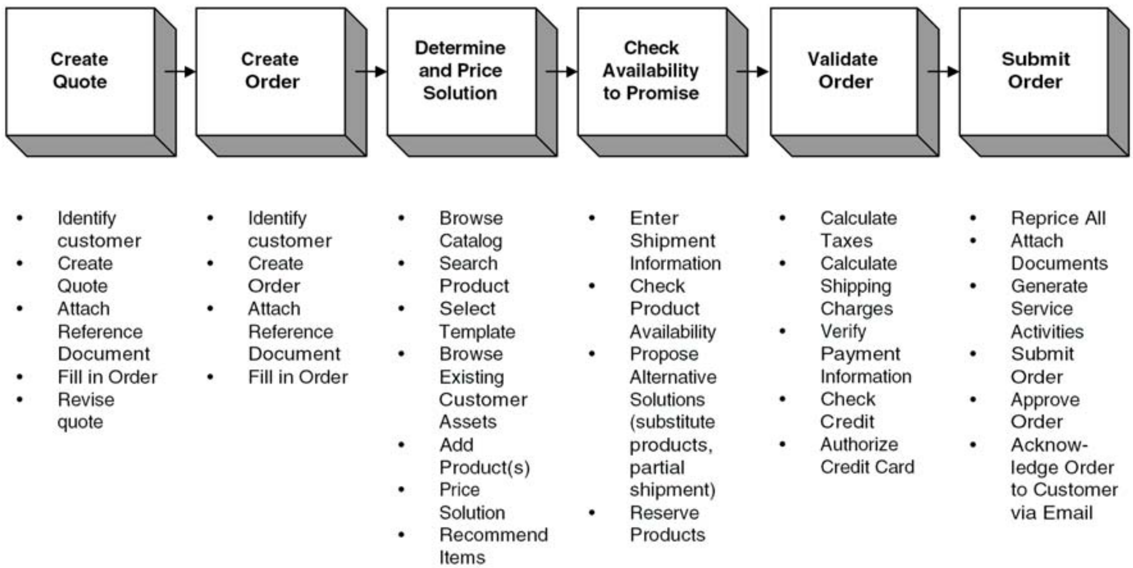


Figure 1. Development of an Order

Structure Underlying Order Management

Siebel Quotes and Siebel Orders requires an underlying structure of information. To set up the structure required for order management, you work with a collection of screens in your Siebel application. The process includes setting up customer accounts and contacts, creating records for sales people, defining products, setting up pricing structures, and developing a catalog of products and services. These provide the framework from which your Siebel Sales and Call Center applications draw information as customers request quotes and place orders. Chapter 2, "Setting Up Order Management" provides details about the setup tasks required for order management.

End-User Activities in Order Management

After the structure required for order management is in place, your employees can carry out their respective order management tasks.

- As your customers express interest in your products and services, you can keep track of that information and help them identify the appropriate solution.

  A salesperson can create an opportunity and record the best solution to meet the customer's needs.

  Once the best solution is identified, a quote is provided that details the products and prices. A salesperson may convert an opportunity to a quote, or create a quote manually and provide it to the customer.

- Once a customer accepts a quote, it can be converted to an order. Or, a sales administrator may create an order directly while talking with the customer.
- The sales administrator can enter shipment information.
- The sales administrator can perform validation tasks, such as calculating tax and shipping costs, verifying payment information, checking the customer's credit, and authorizing their use of a credit card.
- Final details relating to the order can include attaching relevant electronic documents, such as a purchase order or letter of credit, generating service activities, and submitting the order.
- If appropriate, the order can be routed for approval by a supervisor.
- After the order has been submitted, an acknowledgement of the order can be sent to the customer by email.
- When the order has been filled, the appropriate product line items become assets. Assets are associated with the customer's account and are a central part of the customer's service profile.
- Not all products in an order convert to assets. For example, when an order for telephone service is provisioned, installation is a line item of the phone service product, but it does not become an asset. You can specify what products will become trackable assets through the Product Administration screen.

- Sometimes customers change their minds and want to revise an order before the original one has been filled. These kinds of changes can be handled by modifying unsubmitted orders or by creating supplemental orders that revise submitted orders.

Although end users may start the order management process at a number of different screens and views, the underlying order management cycle is essentially the same.

The cycle of events for order management is shown in Figure 2.

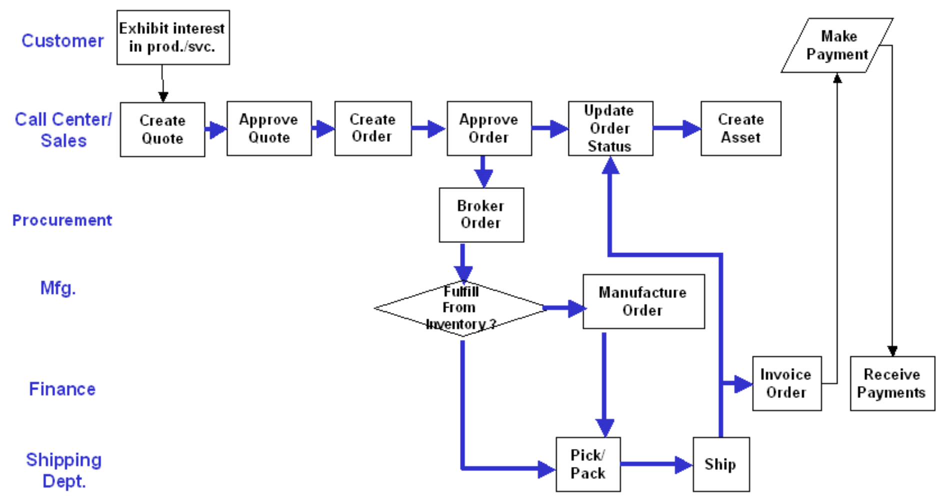


Figure 2. Order Management Cycle

Basic Concepts Relating to Order Management

This section describes the basic features and concepts relating to Siebel Quotes and Siebel Orders, organized under these headings:

- "Flexible Ordering Solution"
- "Quote and Order Header Summaries" on page 17
- "Quote and Order Process Concepts" on page 17
- "Products and Pricing Concepts" on page 20

Flexible Ordering Solution

Siebel Orders and Siebel Quotes provides the ability for end users to create quotes and orders from many different screens within your Siebel application. Sales reps can start by generating a quote from an opportunity, creating a quote in response to a conversation with a customer and later converting it to an order, or creating an order directly, without previously having an opportunity or a quote. Line items can be added to the quote or order in different ways, depending on whether the user knows the product number or wants to browse through a catalog.

The processes for developing quotes and orders are very similar. With each, users can add line items and provide discounts, enter payment information, and enter shipping information.

Step-by-step instructions that show how users can work with quotes and orders are provided later in this book. In particular, see:

- Chapter 3, "Working with Quotes"
- Chapter 4, "Working with Orders"
- Chapter 5, "Preparing for Integration"

Quote and Order Header Summaries

Header summaries appear at the top of the Quote Detail and Order Detail views and remain in place even when users select different view tabs and work with subviews to perform various tasks. These two-row forms contain key information fields that users frequently need to refer to during the quote and order process. Figure 3 shows an example of the Quote header summary.

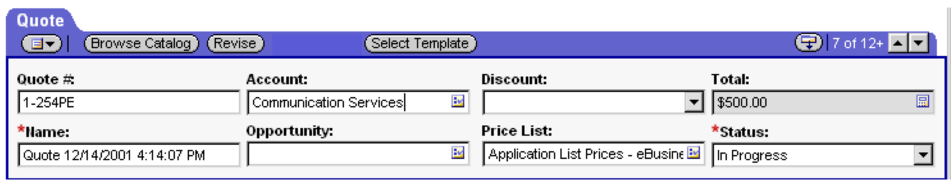


Figure 3. Quote Header Summary

Quote and Order Process Concepts

Siebel Order Management functionality is built around the ability to create an accurate order that contains accurate information about products, pricing,and customer payment. Built into the features are validations that make sure each set of information is accurate.

Product Selection

Users can add products to quotes and orders in a variety of ways. Each method accesses product information that has been carefully defined in the Product Administration screen, so that it appears correctly in the quote or order. Product selection methods include:

- Adding an individual item in a line item record
- Adding multiple items with the Add Items button
- Browsing a catalog and selecting items
- Selecting a template of products to be added at once
- Adding a series of items and then grouping them as a package to offer an appropriate package discount
- Writing in an item that hasn't been defined

Pricing and Discounts

When products are added to a quote or order, prices for the items are derived from the price list associated with the order. Price lists typically default based on the account, but users can also select a price list in the quote or order.

Sales reps or other sales staff can also offer manual discounts in addition to or instead of the pricing shown. Discounts can be for individual line items or for the quote or order as a whole.

Personalization rules can be used to let sales reps know when to suggest additional products, or to inform customers when purchasing additional quantities will reduce prices.

Calculating Taxes

Tax rates and tax exemption information can be entered manually, or you can integrate with third-party tax software to determine tax rates.

Shipping and Delivery Information

Ship-to information, delivery method, and carrier can all impact total cost. This information can be detailed in the quote or order.

Multiple Methods of Payment

Siebel Order Management includes six initial methods of payment—credit card, purchase order, check, wire transfer, cash, and stored value. Customers can use any of those methods. In an order, customers can also use multiple methods of payment. For example, part of an order might be paid with a check and the remainder with a credit card. Each method has different relevant information that can be collected through specialized payment detail forms. For example, credit card payment detail includes credit card number, expiration date, cardholder name, and so forth.

Activities and Activity Plans

Before submitting an order, sales reps or sales administrators review all of the available information about the order, including activities that should be associated with particular line items. For example, if a product requires installation, an activity to schedule the installation can be added. Sometimes bundles of activities are required; these can be set up in advance as activity plan templates and added all at once.

Quote-to-Order

When a customer approves a quote and it becomes an order, an employee end user such as a CSR (Customer Service Representative) can convert the quote information into an order with the click of a button. When the end user clicks the Sales Order or Service Order button, the following occurs:

- A new order is generated
- All line items in a quote are converted to order line items

After a quote is converted to an order, the original quote still exists and can be referenced, but will be inactive. You will see the quote number in the order details.

Revising an Order

Revising an order allows the representative to create a revision of the order without altering specific information on the order. This can be used to create a delta in the back office that can be used by the back office for processing modifications.

Products and Pricing Concepts

The following concepts related to products and pricing are important when working with Siebel Order Management.

Product Type

Products are designated as one of three types: product, service, or training. This distinction is made so that you can roll up information such as prices for each product type.

- **Product.** This type is used to identify physical products.
- **Service Product.** A service product is a product that is not a physical product, although it is often associated with one. For example, an extended service contract for a computer is considered a service product. Another example of a service product is one that is delivered over time, such as telephone or electrical service. A service product may have physical components. For instance, a residential electric service would include a meter. A product becomes a service product if it is marked as one in the product record.

Bundled Products

Bundled products consist of product components. Pricing is at the root only, and cannot be rolled up through the components. For example, a computer, monitor, and printer when sold independently might cost $100, $200 and $300 respectively, but might be offered as a bundle for $550.

Simple Products

Simple products may have attributes that can be selected, but do not have a hierarchy of subcomponents and therefore cannot be customized. For example, a telephone might come in different colors, but not have subcomponents to select. For more information about products and attributes, see *Product Administration Guide, MidMarket Edition*.

Smart Part Numbers

When interfacing with back-office fulfillment systems, it is very important that each particular product can be identified. Smart part numbers are used to identify each combination of product ID and attributes. The smart part number becomes the SKU used in the back office. This can be done manually, or you can interface with an auto-generation system. The smart part number for each line item appears in the Order screen, in the Line Detail subview associated with the line item. For more information about smart part numbers, see *Product Administration Guide, MidMarket Edition*.

Product Templates

When a particular group of products and attributes is ordered frequently, an administrator or a sales rep can create and save a template to make it easy to add the items as a group. Administrators can create public templates through the Applications Administration screen, which are available to all users. Individual users can create private templates that only they will have access to.

Pricing for Bundled Products

Products that are combined into a bundle may be priced differently than those same products purchased individually. For example, when sold as a bundle, a computer, printer, and monitor may cost less than those same items purchased separately. Or with the addition of a printer to an order, the customer may have the option to add another option at a reduced cost. For more information about pricing factors and rules, see *Pricing Administration Guide, MidMarket Edition*.

Setting Up Order Management 2

This chapter describes the setup required in your Siebel application to make use of Siebel Quotes and Siebel Orders features. Details are provided in this chapter for those tasks that relate directly to quote and order processes, and cross-references are provided to supporting tasks that are described in other documents.

NOTE: Tasks required to integrate your Siebel application with back-office systems are not included in this chapter. For information about integration tasks, see Chapter 5, "Preparing for Integration."

Overview of Setup Required for Order Management

A number of manuals on the *Siebel Bookshelf* provide detailed information about the tasks described below. This book, *Siebel Order Management Guide, MidMarket Edition*, covers the features available through the Siebel Quotes and Siebel Orders. Table 1 summarizes the tasks required to set up order management and tells you where to learn about each of the tasks—whether in this guide, or another guide on the *Siebel Bookshelf*.

Table 1. Setup Tasks for Order Management

Main Task	Comments and References
Determine best customer account structure and set up accounts. Accounts are used for numerous quote and order entry tasks, so it is necessary to create accounts to properly process quotes and orders. For example, you need to define the billing and shipping addresses. Screen: Accounts	For details, see "Setting Up Accounts and Contacts" on page 29.
Set up contacts. As you create accounts, enter the contacts associated with the accounts. These will be the contacts that are available to select in a quote or order. Screen: Contacts	For details, see "Setting Up Accounts and Contacts" on page 29.
Set up a class system. You use the class system to define and manage product attributes. Screen: Application Administration > Class Administration	For details, see *Product Administration Guide, MidMarket Edition*.
Define products. You define products and assign those that have attributes to classes. Screen: Product Administration	For details, see *Product Administration Guide, MidMarket Edition*.
Define pricing. You create price lists and assign prices to products.	For details, see *Pricing Administration Guide, MidMarket Edition* and *Product Administration Guide, MidMarket Edition*.

Table 1. Setup Tasks for Order Management

Main Task	Comments and References
(Optional.) Create catalogs of products and make them available. After creating catalogs and their associated categories, you associate access groups with them to control visibility. Screen: Catalog Administration	For details, see *Siebel eSales Administration Guide, MidMarket Edition* and *Security Guide for Siebel eBusiness Applications, MidMarket Edition.*
Set up order types. You can define additional order types beyond those that come preconfigured. Screen: Data Administration > Order Types	For details, see "Setting Up Order Types" on page 32.
Set up order statuses. You can define additional order statuses beyond those that come preconfigured. Screen: Application Administration > List of Values	For details, see "Defining Order Statuses and Using the State Model" on page 34.
(Optional.) Use the state model to set up and enforce rules related to order modification. Screen: Business Process Administration > State Model	For details, see "Defining Order Statuses and Using the State Model" on page 34 and *Siebel Business Process Designer Administration Guide, MidMarket Edition*.
Set up shipping information. You can define additional shipping carriers, shipping methods, shipping terms, and set up shipment freight calculation. Screen: Application Administration > List of Values	For details, see "Shipping Settings" on page 35 and *Siebel eSales Administration Guide, MidMarket Edition*.
Set up tax calculations. You can integrate your Siebel application with an external system to calculate taxes due on a quote or an order.	For details, see "Setting Up Tax Calculations" on page 36 and *Siebel eSales Administration Guide, MidMarket Edition.*
Set up payment terms and other payment factors. You can customize payment terms, payment methods, accepted credit card types, and other payment-related factors. Credit card processing is handled through implementation with a third-party payment processing system. Screen: Application Administration > Payment Terms	For details, see "Payment Settings" on page 37 and *Siebel eSales Administration Guide, MidMarket Edition*.

Table 1. Setup Tasks for Order Management

Main Task	Comments and References
(Optional.) Set up activity plan templates. You can create templates of activities that should be carried out when particular products are ordered. For example, you can indicate all the installation activities required for a particular order. Screen: Application Administration > Activity Templates	For details, see "Product Selection Templates" on page 41 and *Applications Administration Guide, MidMarket Edition.*
(Optional.) Set up product selection templates. You can create groupings of products that your users will frequently add to orders. Screen: Application Administration > Templates	For details, see "Product Selection Templates" on page 41.
Define the sales, order, and quote processes. You can customize the processes that employee end users will follow to order products and services. You can use Siebel Business Processes to automate many of the steps in your business processes, and you can customize the predefined business processes. Screen: Business Process Administration	For details, see "Customizing the Sales, Quote, and Order Processes" on page 44, Chapter 5, "Preparing for Integration," *Siebel Business Process Designer Administration Guide, MidMarket Edition*, and *Siebel eSales Administration Guide, MidMarket Edition*.

Summary of Lists of Values to Update

Many of the changes you will make while setting up order management are implemented by adding to or changing the items available in drop-down lists throughout the order management screens. This list below identifies the lists of values that relate to order management, many of which are described in the sections that follow in this chapter.

Details on maintaining lists of values are provided in *Applications Administration Guide, MidMarket Edition*.

On the More Info view tab

- Order Type
- Order Status
- Hold Reason
- Return Reason
- Priority
- Default Discount %

On the Line Items/Totals view tab

- Shipping Method
- Shipping Terms
- Carrier

On the Line Items/Line Detail view tab

- Shipping Method
- Unit of Measure
- Hold Reason
- Product Status

On the Payments view tab

- Tax Exempt Reason

On the Payment Detail view tab

- Payment Method
- Payment Type
- Payment Status

Setting Up Accounts and Contacts

How your company enters and organizes your accounts will affect how users enter shipping and payment information in quotes and orders.

When accounts have multiple locations, they can be set up in one of two ways:

- As one account with multiple addresses
- As separate accounts, one for each address

  When you set up separate accounts for each address, you create one account as the parent account, and then designate it as the parent for each of the other locations. This creates an account hierarchy.

Consider which account structure is better for your business, so that you can ship to and bill customers correctly. You will want to consider how this is implemented in your back office, so that you can more easily keep information updated between the two systems. The account structure setup you choose will impact the implementation of your organization's order management processes. The impacts of the two methods are outlined in Table 2.

Table 2. Impact of Account Organization on Quotes and Orders

Account Structure	Impact for Quotes and Orders
Hierarchical accounts, with one account designated the parent	Different accounts can be entered as the bill-to and ship-to entities on the Payment screen.
Single accounts with multiple addresses entered on the Bill To/Ship To view tab	The account will be the same in all places on the Payment screen. Different addresses can be selected, as appropriate for billing and shipping. The address specified as "primary" in the Addresses view tab for the account defaults to the address fields on the quote or order.

The contacts that you associate with accounts determine the contacts that you can select in Quotes and Orders. Make sure that you attach the contacts to accounts that you want to have available to users when they create orders.

Setting Up Products, Pricing, and Related Features

Defining products and specifying how they are priced is fundamental to working with quotes and orders. Your Siebel applications provide a number of features and processes that you use to define products and pricing.

Before you can make use of Siebel Quotes and Siebel Orders, you will work through the series of product and price-related tasks listed below. These are described in *Product Administration Guide, MidMarket Edition* and *Pricing Administration Guide, MidMarket Edition*.

- Set up a class system. You use the class system to define and manage product attributes.

  When you define product characteristics as attributes, you can both simplify your product catalog by reducing the number of items and make it easier for customers to specify the options they want and need. For example, you could use attributes to specify the colors available for a phone, the options available for DSL bandwidth, and the number of rings desired for call forwarding.

- Define products and assign those that have attributes to classes.

  NOTE: When you create products, be careful about specifying the product type. Each product record is designated as either a Product, Service, or Training. In the Orders Total subview for line items, prices are rolled up totals for each of these types of products, and shown in the Products Net, Services Net, and Training Net fields. In addition, you can use the spread discount feature with products of a particular type—product, service, or training.

- Define product bundles. If you have component-based products (customers will purchase the bundle as defined), you create them as product bundles.

- Create price lists and associate products with them.

- Test defined products and pricing. You test the product and pricing models to make sure they will work as desired, and then release them, so that they are available for use.

- Create catalogs of products and provide access to them. For more information, see "Creating Catalogs of Products and Making Them Available" on page 31.

Creating Catalogs of Products and Making Them Available

End users can identify and select products for customers from a catalog of products. These products can then be added to a quote or an order.

A catalog is a collection of items that have been arranged in a particular hierarchy, to be available for particular users. You define what items should be included in a catalog, and then grant access to the catalog by association particular access groups with it. You can create multiple catalogs, and assign one or more access groups to each catalog.

Once your catalogs are set up, users can browse through categories arranged in a logical hierarchy to find specific products of interest to customers. They can also search for products using either full-text search or parametric search.

Catalogs are created and administered through the Catalog Administration screen. For information on setting up and administering catalogs, see *Siebel eSales Administration Guide, MidMarket Edition*.

An access group is a collection of any combination of positions, organizations, divisions, accounts, and user lists. A user is associated with an access group by being associated with a position, organization, division, account, or user list that is a member of the access group. Once you have defined access groups, you can associate them with catalogs and categories. Access groups determine which catalogs and categories are visible to the user. When displaying a list of products, for example, in parametric search, the user will see only those products that are in categories accessible to that user.

Access groups are defined in the Group Administration screen > Access Groups view. For information on defining access groups, see *Security Guide for Siebel eBusiness Applications, MidMarket Edition*.

Setting Up Order Types

Siebel Orders initially define nine types of orders, as listed in Table 3 below.

You can define additional order types to meet your needs, or you can edit the existing list of values.

Table 3. Initial Types of Orders

Type of Order	Typical Use
Internal order	Replenishing stock, or moving inventory among inventory locations.
Purchase order	Buying parts from external vendors.
RMA (Return Material Authorization) Advance Exchange	Handling customer returns that require receiving and immediate shipping of exchange parts, before receiving the returned part.
RMA Repair Return	Handling customer returns that require receiving, repairing, and shipping back to customers.
RMA Return	Receiving inbound returns from customers.
Repair order	Ordering, shipping, and receiving parts to be repaired by a third party.
Sales order	Any customer order that is owned by, processed by, and credited to a sales business. Typically, selling new finished goods to customers, normally from manufacturing inventory.
Service order	Any customer order that is owned by, processed by, and credited to a service business. Typically, a request from a customer for service on existing products, including replacement and repair of parts.
Web Order	A sales order created at a Web site or requested directly over the Internet.

Each order type is either a sales order or a service order. This is determined by the Type Code associated with it in the Data Administration screen, Order Type view.

Each order type has action types associated with it. Action types are used primarily in Siebel Service. For more information about action types, see *Siebel Service Guide, MidMarket Edition*.

To define a new order type

1. Add the necessary order types to the Order Type list of values.

   For details about managing lists of values, see *Applications Administration Guide, MidMarket Edition*.

2. From the application-level menu, select View > Site Map > Data Administration > Order Types.

3. In the Order Types list, add a new record.

4. In the Order Type field, select a value from the drop-down list.

Defining Order Statuses and Using the State Model

Siebel Orders come with a number of preconfigured order statuses. You can create additional statuses, if you need them, or edit the existing list of values.

You can determine what fields can be changed depending on the status of the order or line item. Often these rules mirror back-office constraints. For example, Ship to Address cannot be changed once the order has been picked up or shipped. Similarly, order quantities and details cannot be changed once an order has been submitted.

You define the state model in the Business Process Administration screen. For more information about working with state models, see *Siebel Business Process Designer Administration Guide, MidMarket Edition*.

Shipping Settings

There are three types of shipping settings that you should set up to make order management work correctly: carriers, shipping methods, and shipping terms. You should review the preconfigured choices and make any additions and changes in the appropriate list of values. In addition, you should make sure the shipping charge calculation is set up correctly.

- Define carriers.

  Shipping carriers specify what carrier will be used to deliver items in an order. Out-of-the-box, the available carriers include Airborne, DHL, Emery, Federal Express, UPS, US Mail.

  Make sure the list of values contains the carriers you want to use.

- Define shipping methods.

  Shipping method is used primarily to identify how quickly the shipment will occur, and how long delivery will take. Out-of-the-box, the available methods are Next Day, 2 Day Service, and Ground. You can add additional methods by adding them in the list of values. For example, you might want Air, Train, or Ship as a method.

  The shipping method impacts the shipment charges.

- Define shipping terms.

  Shipping terms are used to specify the relationship between payment and shipping. The preconfigured shipping terms are Due, FOB, TBD, No charge. You can add additional terms by adding them in the list of values.

- Define shipment freight calculation.

  The result of the shipping calculation shows in the Shipping Charges field, in Line Items Totals form, in an order. Shipping is calculated at the line level, and is then rolled up for all line items and displayed in the Totals form.

  For details about how shipping charges are calculated and how to change them, see *Siebel eSales Administration Guide, MidMarket Edition*.

Setting Up Tax Calculations

Tax calculations can either be done manually, or through the Tax Calculator business service, which makes a call to a third-party vendor.

Entering Taxes Manually

Users can enter tax information directly in the tax fields, in the Payments view tab in an order. Tax fields include Tax Rate, Tax Exempt Flag, Tax Exempt Code, and Tax Exempt Certification ID.

If users will enter tax information manually, the only required setup is to define the appropriate tax exempt codes in the list of values.

The user's experience will be that they enter the tax rate on the Payments form or select a tax exemption code and tax exemption ID, if the customer indicates they are exempt from taxes.

Using a Third-Party System to Calculate Taxes

You can have taxes calculated by an external third-party system.

When using a third-party system, the end user should make sure that the ship-to addresses are correct, and then click the Calculate Taxes button on the Line Items Totals form. The user will then see the taxes on the Total form, and can see the tax rate in the Payments form. Because ship-to addresses can vary per line item in an order, the tax rate can also vary per line item.

Tax exempt information can be entered in your Siebel application on the Payments view tab in a quote or order. However, customers can file their tax exempt information with a tax provider for validation. When the third-party tax system contains tax-exempt information, that information is updated when the user clicks Calculate Taxes.

If you want to hide the tax-exempt fields from users, you must customize the Payments form in Siebel Tools. There are three tax exempt fields: Tax Exempt Flag, Tax Exempt Reason, and Tax Exempt Certification ID.

When you use a third-party taxation application, taxes are calculated on quotes and orders. The Calculate Taxes step calls the Tax Calculator business service, which makes a call to the third-party vendor.

For details about setting up and using a third-party taxation application, see *Siebel eSales Administration Guide, MidMarket Edition*.

Payment Settings

A number of payment factors need to be considered when setting up order management. This section describes these factors:

- "Defining Payment Terms"
- "Credit Card Processing" on page 38
- "Credit Card Authorization and Verifications" on page 38
- "Credit Card Types" on page 38
- "Defining New Methods of Payment" on page 40
- "Define a Message for Check Payment" on page 40

Defining Payment Terms

Payment terms are used to specify when payment is due, in relation to the order date or ship date. For example, payment terms might include terms such as Net 10, Net 20, Net 30, Net 60. Users select them on the Payments view tab of a quote or order.

To define a new payment term

1. From the application-level menu, choose View > Site Map > Application Administration > Payment Terms.
2. In the Payment Terms list, add a new record.
3. Enter a name for this payment term and complete appropriate fields to define the payment terms.

To change settings for current payment terms

1. From the application-level menu, choose View > Site Map > Application Administration > Payment Terms.
2. In the Payment Terms list, select the appropriate record and make the necessary changes.

Credit Card Processing

Processing of credit cards is done through integration with a third-party processing system. For details about how to set this up, see *Siebel eSales Administration Guide, MidMarket Edition*.

NOTE: Integration for credit card processing is provided with Siebel Quotes and Siebel Orders. If you want to integrate with a back-office system to provide processing of other payment methods, you can set up new business services to provide this functionality. For more information, see *Siebel Tools Reference, MidMarket Edition* and *Siebel Tools Online Help, MidMarket Edition*.

Credit Card Authorization and Verifications

Your Siebel application comes preconfigured with business services for some third-party services. If you use a different third-party service, you may want to create special Business Services to accomplish tasks related to card authorization and verification.

Authorization Code. The Authorization Code field is not preconfigured to populate automatically. If your back-office system sends an authorization code, you may want to create a business service to interface with Siebel Order Management.

Card Verification #: The credit card verification number is a four-digit unique identifier that is often printed on the back of a credit card. It is used to reduce fraud because only the person holding the card should know it.

NOTE: To avoid exposing sensitive data, when implementing this consider how to clear it from your database.

Credit Card Types

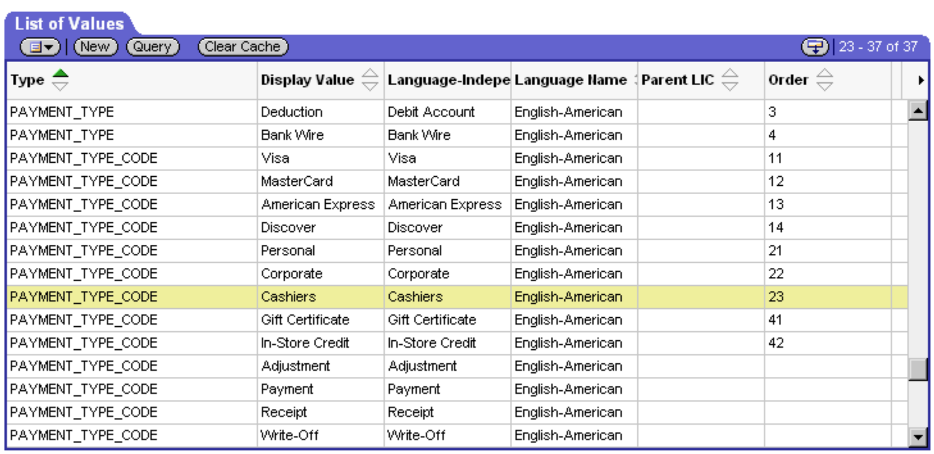
Siebel Quotes and Siebel Orders provides these credit card types out-of-the-box: Visa, Mastercard, Discover, and American Express.

You can add more credit card types by entering them as values in the Applications Administration > List of Values screen. The List of Values type to define is PAYMENT_TYPE_CODE. When you add another value of the PAYMENT_TYPE_CODE type for the new credit card, you also need to associate it with the payment method by entering a value in the Order column. The number range associated with credit cards is 10 to 20. Values 11 through 14 are preconfigured for Visa, Mastercard, Discover, and American Express. You can use a value between 15 and 19 to enter in the Order field for the new credit card. Figure 4 shows the PAYMENT_TYPE_CODE list, with values in the Order column used to associate the types with the appropriate method.

NOTE: If you need to add a payment type for a payment method other than credit card, use these value ranges in the Order field:

Check method: 20-29
Stored value method: 40-59

If you create another payment method which requires payment types, use the range 60-80 for the new method.



Type	Display Value	Language-Indepe	Language Name	Parent LIC	Order
PAYMENT_TYPE	Deduction	Debit Account	English-American		3
PAYMENT_TYPE	Bank Wire	Bank Wire	English-American		4
PAYMENT_TYPE_CODE	Visa	Visa	English-American		11
PAYMENT_TYPE_CODE	MasterCard	MasterCard	English-American		12
PAYMENT_TYPE_CODE	American Express	American Express	English-American		13
PAYMENT_TYPE_CODE	Discover	Discover	English-American		14
PAYMENT_TYPE_CODE	Personal	Personal	English-American		21
PAYMENT_TYPE_CODE	Corporate	Corporate	English-American		22
PAYMENT_TYPE_CODE	Cashiers	Cashiers	English-American		23
PAYMENT_TYPE_CODE	Gift Certificate	Gift Certificate	English-American		41
PAYMENT_TYPE_CODE	In-Store Credit	In-Store Credit	English-American		42
PAYMENT_TYPE_CODE	Adjustment	Adjustment	English-American		
PAYMENT_TYPE_CODE	Payment	Payment	English-American		
PAYMENT_TYPE_CODE	Receipt	Receipt	English-American		
PAYMENT_TYPE_CODE	Write-Off	Write-Off	English-American		

Figure 4. Payment Type List of Values

Defining New Methods of Payment

Siebel Quotes and Siebel Orders comes with these payment methods: cash, credit card, purchase order, stored value, wire transfer, and check. Each method has a predefined set of fields to support the appropriate information.

NOTE: The Orders screen allows more payment method information to be captured and displayed than the Quotes screen. For example, the stored value payment method is not available in a quote, and the fields available for the other methods are limited.

You can add more payment methods to suit your business needs. To do so, you need to create an additional entry in the PAYMENT_METHOD method list of values, a new table, and an additional applet to support the method. You may also want to require that the user complete particular fields for each payment method. Required fields can be set in Siebel Tools. For more information about adding payment methods, see the technical note on SupportWeb.

Define a Message for Check Payment

Customers paying by check often need to know where to send the payment. A field in the Payment Detail form for check payments provides a convenient place to display this type of information that a sales rep needs to communicate to the customer. This field is labeled Check Mailing Address in the Payment Detail - Check form in the Order Entry - Payment view.

You can enter the information that should display in this field in Siebel Tools, in the Payments business component, in the user property Check Mailing Address.

Product Selection Templates

Product selection templates are combinations of products that have been saved for easy reuse. They can then be added to a quote or order at once.

An administrator can set up product templates in advance and make them publicly available. In addition, individual users can create private templates of frequently-used products.

When you create a product template, it includes the following information about each line item: sequence, description, unit of measure, type, and associated attributes.

Creating a Product Selection Template

When you create a product template, you define what products to include, the quantity, and the attributes that should be used as the default.

To set up an order template

1. From the application-level menu, select View > Site Map > Application Administration > Templates.
2. In the Product Template List, add a new record.
3. Enter a name and description for the template.
4. In the Product Template Item List, click the Add Items button to open the Pick Products dialog box.
5. In the Pick Products dialog box, follow these steps to define the products you want to include in the template:
    - **a** Use the Query function to locate the products you want to include in this template.
    - **b** For each product you want to include, enter a number in the Max Order Qty field to specify the maximum quantity that may be ordered at one time.

c For products with attributes, click the Attributes button and define the attributes to be set for the product.

NOTE: You can also set and change attributes later. Attributes associated with an item are displayed in list below the Product Template Item List.

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d When you are finished specifying products, click OK.

Setting Up Activity Plan Templates

In Siebel Quotes and Siebel Orders, activity templates are useful to itemize the activities that should occur after an order is placed or filled for particular products. For example, when a product requires installation, you want arrangements to be made for the installation to occur when the order is placed.

Activity templates are typically created by an administrator, so that they are available when a sales administrator or call center agent creates an order.

The steps below describe how to create an activity template. For how to associate a template with an order, see "Associating an Activity Plan or Activity with an Order" on page 76.

To create an activity plan template

1. From the application-level menu, select View > Site Map > Application Administration > Activity Templates.
2. In the Activity Plan Templates list, add a new record.
3. In the Template form, complete the fields.
   - **a** Enter a name for the template.
   - **b** In the Type field, choose the type Order Entry - Line Items.
   - **c** Enter a template description.
   - **d** In the Auto Trigger field, select the check box, if appropriate.
   - **e** Select the Public check box if the activity plan may be used by others not on your team.

This check box provides the activities from this template to a sales stage, when the sales stage is set for an opportunity.

To create activities for the template

1. From the application-level menu, select View > Site Map > Application Administration > Activity Templates.
2. In the Activity Plan Templates list, select a template.
3. Click the Activity Template Details view tab.
4. In the Activity Template Details list, add a new record for each required activity, choose an activity type, and then complete the other necessary fields.

Customizing the Sales, Quote, and Order Processes

You may want to configure Siebel screens and views to match the quote-to-cash processes used in your company. For example, you can define the default view that users see when they log in, so that users start on the screen they use the most frequently. You can also remove views, or further customize them. You make these kinds of changes in Siebel Tools.

In addition, some actions in the Quote and Order screens trigger predefined business processes that are set up as workflows to automatically copy or send information or to take the user to another screen or view.

- If you want users to be able to create quotes and orders from the Account screen and the Contact screen, you enable a set of workflows.
- If you use the asset-based ordering functionality, it is based on a number of these predefined workflows.
- Some of the ASI-based functions that allow you to integrate with back-office systems also use workflows. For example, submitting an order activates a workflow, as does performing a credit check.

You can customize these workflows to carry out the specific steps and processes required for your business. You can also create additional workflows as needed to support your business process. You make additions and changes to workflows in the Business Process Administration screen. For details, see *Siebel Business Process Designer Administration Guide, MidMarket Edition*. For examples of how you might customize workflows, see "Examples of Customized Order Management Business Processes" on page 44 later in this section.

Some customization of sales, quote, and order processes is done by setting user properties for a business component. For examples of user properties you might change, see "Examples of Changes to User Properties" on page 46 later in this section.

Examples of Customized Order Management Business Processes

The following items provide a few examples of the type of changes a company might consider in customizing the order management process to meet its needs.

Quote Verification

Automatic verification of quotes is not preconfigured. Users can verify a quote manually by choosing the Verify menu option from the menu.

Approval Requirements

Siebel quote and order screens include fields for approvals. Out-of-the-box, they can be used manually. For example, a sales representative might be allowed to approve orders up to $500. However, for orders of $501 and above, the sales rep's supervisor might be required to approve the order before it can be submitted. Out-of-the-box, an end user would need to put a manager's name in the Approved By field.

You could create a business process with Siebel Business Process Designer, MidMarket Edition that would automatically route the order to the supervisor for approval when the amount exceeded $500. You would use a combination of Siebel Business Process Designer and Territory Assignment Manager to set up the required workflows and rules to handle the routing to the appropriate resource.

Customer Acknowledgements

You can use Siebel Business Process Designer to create a workflow that would automatically send an order confirmation to customers.

By creating custom order confirmation workflows, you can have your order management process monitor changes in order status and send appropriate messages to the customer.

Siebel eSales includes out-of-the-box workflows that send acknowledgements to customers. You can use these as samples for how to create similar workflows for use in order management. The eSales workflows are:

- Send Order Accepted Email (eSales). Sent to all users who place an order successfully.
- Send Order Awaiting Approval Email (eSales). Sent to the purchasing manager for an account when an order with a status of Awaiting Approval needs to be reviewed.
- Send Order Failed Email (eSales). Sent to a user when an auction is silently closed and turned into an order, but the credit card used cannot be authorized.

- Send Order Rejected Email (eSales). Sent to a corporate user when the purchasing manager or delegated customer administrator has rejected that corporate user's order.
- Send Order Shipped Email (eSales). Sent to a user when that user's order has been shipped.

These workflow processes are triggered by the Send Order Shipped Email (eSales) workflow policy action, which is triggered by the Send Order Shipped Email Policy (eSales) workflow policy when the order status is changed to Shipped.

Quotes and Orders from Accounts and Contacts

If you want users to be able to create quotes and orders from the Accounts screen and the Contacts screen, make sure that the following workflows are activated in the Business Process Administration screen:

- Account - New Order
- Account - New Quote
- Goto_Order
- Goto_Quote
- Contact - New Order
- Contact - New Quote

Examples of Changes to User Properties

User properties can be used to customize some order management capabilities. User properties you might want to change are listed in Table 4 on page 47.

User Properties in Order Management

Table 4 lists some user properties that apply to Siebel Order Management. User properties are changed in Siebel Tools. For details, see *Siebel Tools Reference, MidMarket Edition*.

Table 4. User Properties in Order Management

User Property	Buscomp or Applet	Function
Check Minimum and Maximum Price	Quote Item, Order Entry - Line Items, FS Agreement Item	Checks minimum and maximum price when making manual adjustments to line item.
Spread Discount - Use Root Product Type	Quote Item, Order Entry - Line Items, FS Agreement Item	If set to Y and spreading a discount by type, spreads on components if the root type is the type selected. Otherwise, spreads on the type of component only if the type of component itself matches the selected spread type.
Add Items Limit To Price List	Internal Product Popup	Limits the products that display in the Add Items dialog box to records contained within the price list.
Minimum CC Txn Amount	Payments BusComp	Sets the minimum amount payable by credit card when entering a payment line.
Minimum Cash Txn Amount	Payments BusComp	Sets the minimum amount payable by cash when entering a payment line.
Minimum Check Txn Amount	Payments BusComp	Sets the minimum amount payable by check when entering a payment line.
Minimum Purchase Txn Amount	Payments BusComp	Sets the minimum amount payable by purchase order when entering a payment line.
Minimum Stored Txn Amount	Payments BusComp	Sets the minimum amount payable by stored value when entering a payment line.
Minimum Wire Txn Amount	Payments BusComp	Sets the minimum amount payable by wire transfer when entering a payment line.
Check Mailing Address	Payments BusComp	Mailing address for check.

Working with Quotes 3

This chapter describes how end users create and develop quotes in a Siebel application, and how they perform many tasks specific to working with quotes.

Procedures in this chapter direct you to the related information in that chapter when appropriate.

Developing Quotes

A quote is an offer to a customer for specific products and services at a specific price. Quotes can be generated by end users such as call center agents, sales representatives, and sales administrators. The quote may include products and services, effective dates, price lists, any discounts by line item and by account, and the price per item.

The process of developing a quote generally follows this process:

- Start the quote and enter customer information
- Select products and indicate quantities
- Review pricing and apply discounts, if appropriate
- Verify the quote

Quotes can be developed in stages. An end user can create the basics for a quote during one work session, and return to add more information at a later session. Table 5 lists typical steps in developing a quote and where to find detailed information about each step.

Table 5. Typical Steps in Developing a Quote

Typical Step	Comment	For More Information
Start the quote and enter customer information	You can start a quote from many different screens in your Siebel application.	"Starting a Quote" on page 52
(Optional.) Verify the quote	You can verify product, pricing, and price list validity before submitting it for approval or converting it to an order.	"Verifying a Quote" on page 62
(Optional.) Update related opportunity	If the quote is associated with an opportunity, you can update the opportunity record with the information in the quote.	"Updating an Opportunity from a Quote" on page 56
Convert the quote to an order	When the customer agrees to purchase the items, you can convert the quote to an order.	"Converting a Quote to an Order" on page 63

The Quote Header Summary

A Quote header summary appears at the top of each Quote detail screen. The header summary contains key information fields, and remains present on the screen as the end user accesses the various view tabs to enter and review information during the quote process. Figure 5 shows an example of the Quote header summary.

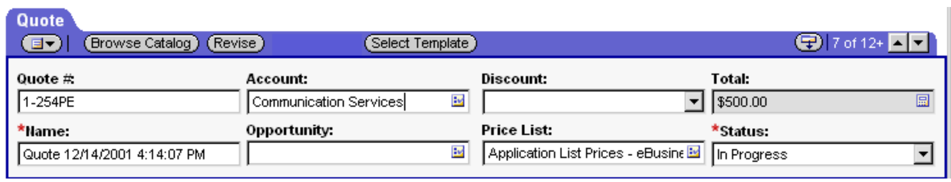

Figure 5. Quote Header Summary

Starting a Quote

Quotes can be started from a number of different screens in your Siebel application. End users can start a quote from:

- The Quotes screen, the Accounts screen, or the Contacts screen, in response to a customer's inquiry or request
- An opportunity
- An asset, when a customer wants to make a change to an existing product or service which the customer has already acquired

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NOTE: The procedure below describes how to start a quote from the Quote screen, from the Account screen, and from an opportunity. For information about how to start a quote that will change to an existing asset, see "Creating Quote Favorites for Reuse" on page 59. Many screens in Siebel applications have views labeled My, All, or All Across Organization. These are typically available in the drop-down list at the top of the screen. If end users do not have access to the particular view listed, they should substitute the view to which they do have access. For example, if an end user does not have access to Quotes > All Quotes view, he or she should navigate to Quotes > My Quotes.

To start a quote

1 Perform one of the following actions, based on where you currently are working in your Siebel application:

   - To start a quote from the Quotes screen, navigate to the Quotes > All Quotes screen.
   - To start a quote from an opportunity, navigate to the Opportunities screen > All Opportunities, select the opportunity for which you want to generate a quote, and click the Quotes view tab.
   - To start a quote for a specific account, navigate to the Accounts > All Accounts screen, select the account for which you will generate a quote, and click the Quotes view tab.
   - To start a quote for a particular contact, navigate to the Contacts > All Contacts screen, select the contact for which you want to generate a quote, and click the Quotes view tab.

2 In the Quotes list, add a new record.

If you started the quote from an account record, a contact record, or an opportunity record, your Siebel application copies the account, contact, or opportunity information into the quote. If a price list is associated with the account or opportunity, it is also entered. Your name automatically appears as the Sales Rep. In addition, your Siebel application automatically generates values for the following fields on the More Info form:

Field	Comments
Quote #	A unique system-generated number assigned to the quote when it is created.
Revision	The number of revisions associated with the quote. When the quote is created, this value is 1.
Created	The date the quote was created. Your Siebel application automatically sets the value for an active quote to the Start Date + 30 days.
Active	A checkbox indicating whether the quote is active. When you create a quote, it is automatically marked as active. Note: The quote must be designated as active in order to attach files to it or otherwise update it.
Status	The initial status of the quote is In Progress. The status can be changed later, as the quote process continues. For example, if you convert the quote to an order, the status changes to Order Placed. Other statuses for the quote are defined by your company. Some of the statuses companies often use include Approved, Rejected, Expired, Placed, and Active.
Effective As Of	Defaults to the created date. You can change this, if appropriate.
Effective Through	Defaults to the effective date plus 30 days. You can change this if the quote will be available for a different length of time.
Currency	Default currency for the quote.

3 If account information was not copied into the quote, enter the account name.

4 Enter a name for the quote. You may also want to enter a price list or default discount to be applied to the line items you will add. Some fields are described in the following table.

Field	Comments
Name	If you do not enter a name for the quote, the quote number is assigned as the name.
Price List	Enter a price list to be used for the quote, if one is not assigned automatically through association with the account. Available price lists are restricted by the currency associated with this quote.
Opportunity	(Optional.) Select an opportunity associated with the quote. The account associated with opportunity is automatically inserted.
Account	Select the account with which the quote should be associated, if one is not assigned through association with an opportunity.
Last Name and First Name	Select the contact for this quote.
Due	(Optional.) Enter a due date for the quote.
Comments	Enter any comments about the quote.

After the end user creates the quote, the end user adds products to it.

Using Auto Quote from an Opportunity

If an end user is working with an opportunity for which the products have already been specified, there is a faster method to generate a quote. The end user can use the Auto Quote button from the Opportunities screen.

The products that are copied from the opportunity to the quote are determined by the Auto Quote check box in the product record. When the end user adds a product to an opportunity, the Auto Quote field is automatically selected. If the end user wants a product to be excluded from a quote, the user can clear the Auto Quote box for that item on the Product view tab in the Opportunities screen.

To use Auto Quote

1. Navigate to the Opportunities screen > All Opportunities view.
2. In the Opportunities list, select the opportunity for which you want to generate a quote.
3. Click the Quotes view tab.
4. In the Quotes list, click Auto Quote.

   A new quote record appears. The products from the opportunity are copied into the quote.

5. Fill in the Name and Price List fields for the quote.
6. (Optional.) Drill down on the quote name to display the Quote Line Items view, where you can perform further work with the quote.

The end user may also want to update opportunities with information from a quote. For more information, see "Updating an Opportunity from a Quote" on page 56.

Updating an Opportunity from a Quote

When a quote is associated with an opportunity, an end user may want to update the opportunity with any new quote information. It is important to keep opportunity information updated with quote information in order to maintain accurate forecasts and charts. When an end user updates the opportunity, information is updated in the Products and Revenues tab.

To update an opportunity from a quote

1. Navigate to the Quotes screen > All Quotes view.
2. In the Quotes list, select the quote, click the menu button and then click Update Opportunity.

NOTE: The Update Opportunity menu option is also available from the menu in the Quote header summary at the top of a quote detail view.

Including Quote Items in a Forecast

When an end user updates an opportunity from a quote, one piece of information that is sent is whether a product is forecastable. The default setting for this in the quote is determined by a setting in Product Administration. Simple products are marked as forecastable and cannot be changed in Product Administration. Components of bundles are marked as not forecastable by default, but can be changed to forecastable.

If end users want to make sure that a product in a quote will be forecastable, they can review the setting in the quote, and mark it as forecastable if necessary. The Forecastable field is available on the Line Item Detail subview.

To mark items in a quote as forecastable

1. Navigate to the Quotes screen > All Quotes view and create a quote.
2. Click the Line Items view tab and add the appropriate products and services as line items.
3. In the Line Item Detail subview, click the show more button.
4. In the Line Items list, select the item you want to check, and make sure that the Forecastable check box is selected. Repeat this step for each product you want to check.
5. When you are finished working on the quote, update the opportunity. For details, see "Updating an Opportunity from a Quote" on page 56.

Accessing An Existing Quote

When an end user wants to review an existing quote or make changes to it, the end user can access the quote from a number of different places in your Siebel application. The procedures in this documentation primarily describe accessing quotes from the Quotes screen, but end users can also access quotes from an opportunity, from an account, from a contact, or from a service request.

To access an existing quote

1. Navigate to one of the following screens:
   - Quotes > All Quotes
   - Opportunities > All Opportunities
   - Accounts > All Accounts
   - Service Requests > All Service Requests
   - Contacts > All Contacts
2. Click the Quotes view tab. (Not necessary if you are already on the Quotes screen.)
3. In the Quotes list, drill down on the quote name.

   The Line Items list and Totals subview appear, displaying details of the quote.

The end user can now make additions or changes to the quote, if it is still in progress, or the end user can revise the existing quote, if appropriate. For more information, see "Revising a Quote" on page 61.

Creating Quote Favorites for Reuse

A *Favorite* is a particular product with a specific set of attributes that an end user has created in a quote and wants to reuse at another time for another quote. Similarly, if the sales representative has created a specific product package, the sales representative can save it to use again.

A Favorite can contain only one line item.

A sales rep who wants to save and reuse a combination of line items in another quote, or in an order, can create a product selection template. For more information, see "Product Selection Templates" on page 41.

To save a Favorite

1. Navigate to the Quotes screen > All Quotes view.
2. In the Quotes list, locate the quote you want to work with and drill down on the Name hyperlink.
3. Highlight the line item you want to save and review it to make sure it contains the information you want to save.
4. In the Line Items view, click the menu button and then click Save as Favorite.
5. In the Save as Favorites dialog box, enter a name.

   NOTE: If you want other users to be able to use this favorite, clear the Save as a Personal Favorite checkbox.

6. In the Favorites dialog box, click Save.

To use a favorite in a quote

1. Navigate to the Quotes screen > All Quotes view and create a new quote.
2. Click the Line Items view tab.
3. Click the menu button and then click Favorites Manager.
4. In the Favorites dialog box, select the favorite you want and click Start from Favorite.

   The products from the favorite are copied into the quote.

5. Make any additional changes you want to the quote.

Revising a Quote

End users can make changes to an initial quote to keep it updated with the appropriate products, price lists, discounts, and so forth. During negotiations with a customer, an end user can add or delete products from a quote and compare features and price.

The Revise feature allows an end user to revise your original quote. Revising a quote creates a new quote record with the same quote number. The versions are distinguished by a revision number. All revisions of a quote appear in the quote list.

NOTE: Making changes to a quote does not automatically create a revised quote. If the end user wants to keep the original quote and have a revision, the user must complete the steps in the following procedure to create a revised quote.

To revise a quote

1. Navigate to the Quotes screen > All Quotes view.
2. In the Quotes list, select the quote you want to revise.
3. Click Revise.

   A new quote, with the same quote number is created.

4. Revise the information in the quote form, the line items, or other information as needed.

   In the Quotes screen you will see both the original quote and the revised quote. You can verify which one is the revision by looking in the Revision column.

NOTE: When the end user revises a quote, the original quote becomes inactive and read-only.

Verifying a Quote

Your company may request that end users verify a quote manually, or the verification process may be handled automatically through a customized workflow process. End users should check with the application administrator to find out how the verification process is handled for your company.

When an end user verifies a quote manually, quote verification performs the following:

- Verifies that the price list is valid. This includes checking that:
  - The price list exists in the dialog box
  - The price list starts before the quote’s start date and ends after the quote’s end date (if the quote start date and end date exist)
- Verifies that the products within the line items are valid. This includes checking that:
  - The product exists in the dialog box
  - The product starts before the quote’s start date and ends after the quote’s end date (if the quote start date and end date exist)
  - The product has valid attributes
  - The product has the correct list price
- Verifies that the discount amount of the quote does not exceed the quote's total list price.
- Checks credit status, if a purchase order has been entered as a payment type.

To verify a quote manually

1. Navigate to the quote you want to verify.
2. In the Quotes list or the Quote header summary, click the menu button and then click Verify.

   Your Siebel application checks the validity of the products, price lists, and totals shown in the quote. When verification is complete, you will see a message. Any problems in the quote are detailed.

Converting a Quote to an Order

When a customer agrees to purchase the items on a quote, an end user can convert the quote to an order.

To create an order from a quote

1. Navigate to the Quotes screen > All Quotes view.
2. In the Quotes list, locate the quote you want to work with and drill down on the Name hyperlink.
3. Review the line items and related details and make sure they contain the correct information.
4. Click the Orders view tab.
5. Click either Sales Order or Service Order, depending on the type of order you want to create from this quote.

   An order is created from the quote, and appears in the Orders list.

6. To work with the order, drill down on the order number.

   The Order Screen, Line Items view appears.

Working with Orders 4

This chapter describes how end users create and develop orders in a Siebel application, and how they perform tasks specific to working with orders.

This chapter covers the following topics:

Order Overview

An order is a commitment on the part of the customer to purchase products and services at a specific price. Orders can be generated by sales people from quotes, or may be created directly by call center agents and sales administrators. Orders can be created and placed all at once, or developed in stages as the customer clarifies payment information, shipping information, and other details. When the order is complete, the end user submits it.

After the order is placed, a call center agent can monitor the order, proactively informing the customer of order status and delivery information. In the case of a customer inquiry, an agent can use the Get Status business service to obtain the latest information and determine the status of the order, if the order is being processed by the back-office. In the event that post-order service is required, service requests and returns can be created against the order.

Orders are identified as either sales orders or service orders. Sales orders are generally for new products, while service orders are used to support service parts processing.

End users work with sales orders and service orders in very similar ways, however some features are specific to each type. This chapter focuses primarily on sales orders. For details about working with service orders, see *Siebel Service Guide, MidMarket Edition*.

Developing and Submitting an Order

The process of developing an order follows these main phases:

- Start the order and enter customer information
- Enter additional header information
- Select products and indicate quantities
- Check pricing, and reprice the order, if appropriate
- Enter payment information and check credit (optional)
- Submit the order

As an end user develops an order, he or she can work sequentially through the first few view tabs shown in the Orders screen, entering header detail, line items, and payment information.

Figure 6 shows the overall process for creating and submitting an order.

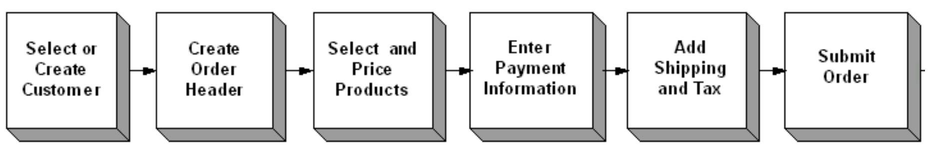

Figure 6. The Order Development Process

Within this process, there are a number detailed steps that may be completed. Table 6 lists the typical steps that may occur during the order development process.

Table 6. Typical Steps in Developing an Order

Typical Step	Comment	For More Information
Start the order and enter customer information.	You can start an order from many different screens in your Siebel application.	"Developing and Submitting an Order" on page 67
(Optional.) Enter any default information such as discounts for the entire order, and requested date for shipment.	When you want a discount to be applied to a series of line items, you can enter it as a default discount before adding the line items. Similarly, you can enter a requested date, and have it defaulted to each line item.	"Developing and Submitting an Order" on page 67
Submit the order	When the order is complete, you submit it to the back office for fulfillment.	"Submitting an Order" on page 75

Order Header Summary and Header

Basic information about an order is contained in three forms: the More Info form, Header Details, and the Order header summary.

The More Info form details the information shown in the Orders list, and includes fields that end users may want to use to help identify or locate a particular order, such as account and contact information, order number, requested date, and the order total.

When an end user drills down on a particular order, the user sees an Order header summary at the top of each Order detail screen. This header summary repeats some of the key summary information about an order that the user may want to have in view while working with the various details of an order. For example, the end user can continue to see the total, status, and requested date while entering line items, shipping information, and payment details.

The Header Details form contains information that is applicable to the entire order. Some of the fields in the Header Details form are used to default the corresponding values for the order line items when an end user adds them. For example, end users can set a default discount to be applied to line items as they add them. This minimizes the entry the end user has to do for individual items in large orders. However, end users can still override this with discounts to some or all individual line items, as they add them.

Starting an Order

End users can identify a customer and start an order in different ways in a Siebel application.

- From the Orders screen, Orders list, where an order entry clerk might create new orders directly from the Header Detail view tab
- From the Accounts screen, when the end user knows the customer's account information
- From a service request, or contact
- From an existing order
- From a quote
- From an asset, when a customer wants to order a change to an existing product or service
- From the Account Summary View

The following procedure describes how to start an order from the Orders screen, from the Account screen, and from other primary screens in your Siebel application.

When an end user starts an order, the user identifies customer information and enters information that will apply to the whole order, such as currency and price list. In addition, the end user sets default values that will apply to the product and service line items that she adds to the order.

NOTE: Many screens in Siebel applications have views labeled My, All, or All Across Organization. These are typically available in the drop-down list at the top of the screen. If end users do not have access to the particular view listed, they should substitute the view to which they do have access. For example, if end users do not have access to Orders > All Sales Orders view, they should navigate to Orders > My Sales Orders.

To start an order

1 Perform one of the following tasks, based on where you currently are working in your Siebel application:

- To start an order from the Orders screen, navigate to the Orders > All Sales Orders.
- To start an order for a particular account, navigate to the Accounts > All Accounts screen, select the account for which you want to generate an order, click the menu button, and then click New Order.
- To start an order from a quote, service request, or contact navigate to the screen for the object, select the record with which the order will be associated, and click the Orders view tab.

2 In the Orders list, add a new record.

If you started the order from a record that has account, contact, or other information associated with it, your Siebel application copies the relevant information into the order. For example, when converting a quote to an order, existing product, pricing, shipping and payment information is also copied into the order. If the quote was associated with an opportunity, the opportunity name is copied in. If the order is created from a contract, the contract name will be copied in. You can see this information in the view tabs associated with the order.

In addition, your Siebel application automatically generates values for the following fields:

Field	Comments
Order #	A unique system-generated number assigned to the order when the order is created.
Status	New orders are assigned the status Pending. The status can be changed later, as the order process continues. Some of the statuses companies often use for sales orders include Open, Awaiting Approval, Approved, Complete, Booked, In Transit, Shipped, and Cancelled.

Field	Comments
Status as of Date	Initially, reflects the current date and time. When the status is changed, this field also updates to show the date and time when the status changed.
Priority	The priority of the order. New orders are assigned the priority Medium.
Order Date	The date the quote was created.
Version	The version associated with the order. When the order is created, this value is typically 1. The number is incremented every time the order is revised. For details see "Revising an Order" on page 79.
State	The state of the order. For example: open, closed, pending. Note that this may not be the same as status.

3. In the Type field, select the type of order you are creating.

NOTE: If you created the order from a contact, it is automatically created as a service order.

4. If you are in the Orders list at the bottom of the Accounts screen, Quotes screen, Service Request screen, or another screen, drill down on the order number to display the Order screen.

5. Click the Header Detail view tab.

6 In the Header Detail form, review any information that has been copied into the order, and make any necessary changes to it. Some fields are described in the table below.

NOTE: Some of the information entered in the Header Detail form will be used as the default settings when you add line items. For example, the Default Discount % becomes the discount set for each line item. Changing it in the Header Detail does not affect the discount of current line items, but sets the discount for the next line items that you add.

Field	Comments
Contact Last Name	The contact for this order.
Sold To Account	The account to whom this order will be sold.
Sold To Address	The address of the account. Since an account may have more than one address associated with it, you can use this field to select the correct address for this order.
Team	Team with which the employee creating the order is associated.
Parent Order	The number of a parent order, if one is associated with this order.
Currency	The currency for the order.
Price List	Defaults to the price list associated with an account, if a price list is associated with an account. Price lists that can be assigned to this order are restricted by the currency.
Default Discount %	Enter a discount to be applied to line items instead of using pricing rules.
Requested Date	Date requested by customer. Depending on your organization's process, this may be either the date the customer would like the products to be shipped, or the date the customer wishes to receive the order.

7 Click the Line Item view tab.

8. In the Totals form, below the Line Item list, enter Shipping Method, Shipping Terms, and Carrier.

   When you enter this information in the Totals form before adding line items, it will default to each line item.

After the order is created, the end user can add products to it.

Accessing An Existing Order

An end user can access an existing order from most of the same places the user can create an order.

To access an existing order

1. Navigate to one of the following screens:
   - Orders > All Sales Orders
   - Accounts > All Accounts
   - Service Requests > All Service Requests
   - Contacts > All Contacts
2. If necessary, in the main screen you are working with, click the Orders view tab.
3. In the Orders list, drill down on the order number.

   The Line Items list and Totals subview appear, displaying details of the order.

The end user can now continue to work with the order.

Submitting an Order

After the end user has completed the information for an order, the user submits it. Submitting the order sends the order to the manufacturing system or warehouse system for fulfillment.

Submitting the order typically sets the status to Booked.

Before the end user submits an order, he may want to check to make sure it has an Active status, current dates, and a valid price list.

To submit an order

1. Navigate to the order which you want to submit.
2. In the Order header summary, click Submit.

   If your company has configured an approval process, the order is evaluated by territory assignment manager rules, and is routed to a manager for approval, if appropriate. If the order meets any approval rules, the order is validated and submitted to your back office system for fulfillment.

Associating an Activity Plan or Activity with an Order

Individual activities or activity plans (collections of activities) can be associated with one or more line items in your order.

Activities are tasks that should be performed after the order has been finalized and submitted. For example, when a customer purchases an item that needs to be installed, an activity template might list all of the activities that need to occur to support that installation. When that template is added to the line item, the activities from it are assigned to the appropriate people, and will appear in their activity lists.

Typically the administrator sets up activity templates in advance so that end users can add them to items in an order. End users can also add individual activities. For information on setting up activity templates, see "Setting Up Activity Plan Templates" on page 42.

To associate an activity plan template with a line item

1. Navigate to the order with which want to associate an activity plan.
2. Select the line item that requires activities.
3. Click the Activity Plans view tab.
4. In the Activity Plans list, click New.

   Today's date is assigned as the planned start date for the activities. You can change it, if required.

5. Select the appropriate activity plan template from the Templates drop-down list.

   You see the activities associated with the template in the Activities list.

6. Click the Activity view tab.
7. In the Activity list, make any appropriate adjustments to the activities.

   If an employee's name is indicated in the activity, the activity will display for that person when the person goes to the My Activities view.

To add an individual activity to a line item

1. Navigate to the order with which you want to associate an activity plan.
2. Select the line item that requires activities.
3. Click the Activity view tab.
4. Click New to add a new record.

   The activity type defaults to Appointment.

5. Complete the fields to define the activity.

Approving An Order

Some orders will require approval. If your company has configured an approval process as part of its order management process, an order may be automatically flagged for approval based on price. A typical configuration of this might cause the status to be changed to Awaiting Approval and the Approver's name to be inserted in the Approved by field when the sales representative clicks Submit.

For example, if an end user has authority to place orders for $1,000, and a customer wants to order merchandise totalling $1,200, the order needs to be approved before it can be submitted.

The steps below describe the steps an end user might take to approve an order when that user is the approver. The exact steps may vary, depending on your company's configuration of this process.

To approve an order

1. Navigate to the Orders screen > All Orders view.
2. Sort the list of orders by status and scroll the list, if necessary, to bring orders with the status Awaiting Approval into view.
3. Review the order to make sure it meets your approval.
4. When you are ready to approve the order, click the More Info view tab and check the Approved field. If necessary, enter today's date in the Approved Date field.

Monitoring an Order

After an order has been submitted, an end user can monitor it as required to make sure that it is being handled appropriately, and to provide customers with information about order status and delivery. The end user can also check the order history to see when the status changed, and who made the change.

Checking the Status of Order Fulfillment and Shipping

An end user can check the status of an order for a customer. The end user may want to obtain order status from other applications.

To check the order status

1. Navigate to the order you want to check.
2. In the Order header summary, click Get Status.

   If your order management process is integrated with a back off system, the Status field is updated with the current information.

Revising an Order

An end user can edit or revise a customer's original order. This is useful when adding or deleting products, and can also be used if an order has expired. Revising an order creates a new version of the same order. Revising helps an end user keep track of changes as the order evolves.

To revise an order

1. Navigate to the order you want to revise.
2. In the Orders list or in the Order header summary, click the menu button and then click Revise.

   A new version of the order is created, with the same order number.
3. Make the required changes to the order—add or remove line items, change attributes, or make additional changes.
4. In the Order header summary, click Submit.

NOTE: When an end user revises an order, the original order becomes inactive and read-only.

Processing a Return

When a customer needs to return part of an order, the end user can base the return on the original order.

NOTE: Some companies use service requests to create return orders. For more information, see *Siebel Call Center User Guide, MidMarket Edition*.

To process a return

1. Navigate to the order for which a return needs to be processed.
2. In the Order header summary, click the menu button and click Copy Record.
3. In the new order, change the Order Type to the appropriate return type—RMA Return, RMA Advanced Exchange, or RMA Repair Return.
4. In the Line Items list, delete the items that are not being returned from the Order line items list.
5. In the Order header summary, click Submit.

Preparing for Integration 5

This chapter describes the setup required to integrate Siebel order management applications with back-office systems. This setup is required in order to send and receive information when end users submit quotes and orders, check the status of an order, and check the credit status for a customer. All of these functions make use of Application Services Interfaces (ASIs).

This chapter includes the following sections:

For more information about Application Services Interfaces, see *Application Services Interface Reference: Siebel eBusiness Application Integration Volume VI, MidMarket Edition*.

Integration Strategy

If you integrate Siebel with back-office, accounting, and other systems, you will need to develop an integration strategy that meets the needs of your business. The following identifies some of the tasks you may want to consider in your strategy. Depending on the particular needs of your company, you may identify different or additional items to be part of your integration strategy.

- **Determine the system of record for each of the key data elements.** Some of the data elements you should consider are:
  - Item masters (product)
  - Customer master
- **Decide how to replicate data.**

  You can either replicate data using batch replication at regular intervals (typically daily) or using real-time replication. If you use real-time replication, you will need to define a triggering event that causes data to be replicated on both systems. For example, you might define the triggering event to be a transaction such as entering a new customer or a new product. In this case, the replication would occur between your Siebel application and your back-office systems when the transaction is submitted. Or you might add a button to an applet that triggers a workflow. Because Siebel applications save data when the user steps off the record, the event you define may not necessarily be tied to when data is written to the database.
- **Define the points in your business process when you want to update information across systems.**

  You identify points in the process at which it makes sense to implement ASIs to update information between your Siebel application and your back-office or a third-party system. For example, when the status of an order is updated in a back-office system, you might want the order status in your Siebel application to be updated automatically. If an end user of the Siebel application performs a query while accessing a new order, you could have the back-office system update the Siebel order in real-time. If your back-office system has the capability to do this, you can implement it using the Update Siebel Order ASI. However, if it is not feasible for your back-office system to provide this update in real-time, the end user can click a Get Status button on the user interface to request the updated order information.

About Application Services Interfaces

Siebel's Application Services Interfaces (ASIs) are predefined interfaces that allow the exchange of information between Siebel applications with external applications.

Several features of Siebel Quotes and Siebel Orders use ASIs:

- **Credit Check.** When a customer uses the purchase order payment option for a quote or an order, the end user can perform a credit check to make sure that the customer will be able to make the purchase on credit. In an order, the user clicks the Credit Check button in the Payment view tab to perform the credit check. In a quote, credit check is performed as part of the verification process when the user chooses the Verify menu option from the menu on the Quote list or Quote header summary. Both actions launch a workflow that first determines if credit check is applicable for the selected quote or order and then, if needed, sends a request to an external system to get the credit decision for that transaction. Typically, the external system that performs the credit check is the back-office order or credit management system. For details about how to set up the Credit Check ASI, see "About Using Purchase Order Credit Checking Applications" on page 90.

- **Submit Order.** When users have finished defining an order for a customer and the customer has agreed to the price and provided payment information, the order is submitted to the back office. When the user clicks the Submit button, the Submit Order ASI workflow sends information about the order to the back office system. For details about setting up the ASIs used by this workflow, see "Setting Up Quote and Order ASIs" on page 85. For details about the user's experience of using the submit order functionality, see "Submitting an Order" on page 75.

- **Submit Quote.** After a quote has been verified, the user can submit the quote to the back-office or any external system. When the user chooses the Submit menu option for a quote record from the menu on the Quote list, the Submit Quote ASI workflow sends the quote information to the external system and updates Siebel with the response from the external system. The external system might use the quote information for converting a quote to an order or for production planning. Additional configuration required for this can be made in the Siebel application as required to meet your company's business needs. For details about setting up the ASIs used by this workflow, see "Setting Up Quote and Order ASIs" on page 85.

- **Query Order Status.** Typically, a company will receive information about the status of orders at regular intervals from the fulfillment system. However, when a sales person talks with a customer about the status of an order, they want to make sure that they present the most current information. In order to do so, they can click the Get Status button on an order. This calls the Get Order Status ASI workflow, which retrieves information from the back-office system. For details about setting up the ASIs used by this workflow, see "Setting Up Quote and Order ASIs" on page 85. For details about the user's experience of using the submit order functionality, see "Submitting an Order" on page 75.
- **Updating Order Status.** When the status of an order is updated in a back-office system, it can replicate that information in the Siebel application to keep the two systems synchronized. This is done by using the Siebel Order ASI with a method of Update or Sync, and can be set up as a Web service. For details about using the Siebel Order ASI, see "Setting Up Quote and Order ASIs" on page 85.

Figure 7 shows the points in the order process where ASI integration occur.

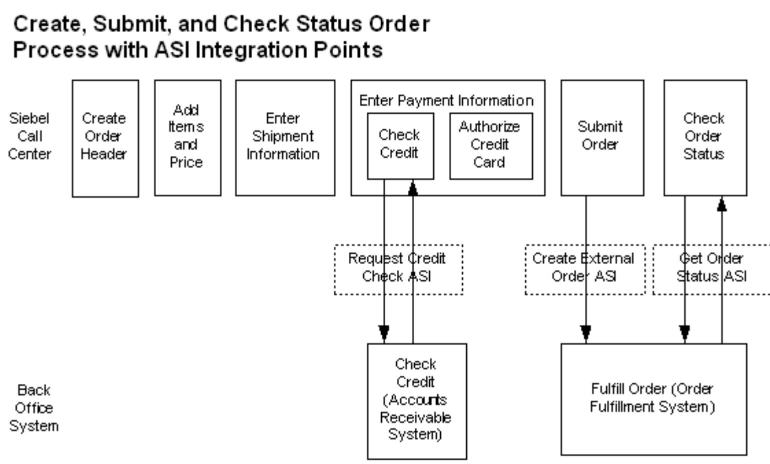

Figure 7. ASI Integration Points in the Ordering Process

You must set up the ASIs shipped with Siebel Quotes and Siebel Orders before they can be used. This chapter provides the procedures that you must perform to set up these ASIs. It also describes the ways that Siebel Quotes and Siebel Orders invokes ASIs, and documents the workflows that you may want to modify to change the ways that ASIs are invoked.

For general information about ASIs, see *Application Services Interface Reference: Siebel eBusiness Application Integration Volume VI*.

Setting Up Quote and Order ASIs

Two pairs of ASIs are used during these four order management processes:

- Submitting orders
- Importing quotes and orders
- Updating quote and order status
- Querying orders

These ASI pairs are:

- Siebel Quote (inbound) and External Quote (outbound)
- Siebel Order (inbound) and External Order (outbound)

To set up real-time submission of quotes and orders with your back-office system, you must:

- Set up the Web services for Quote and Order ASIs
- Activate Workflows

NOTE: If you want to add to or change the fields that are sent to the back-office system, you can customize the integration objects for each ASI. For more information, see *Application Services Interface Reference: Siebel eBusiness Application Integration Volume VI*.

Setting Up Web Services for Quote and Order ASIs

To set up the Web services, you must set up both outbound and inbound Web services for the Quote and Order ASIs. The procedures below show you the steps required for each of these.

To set up the outbound Order Web service

1. From the application level menu, choose View > Site Map > Web Service Administration > Outbound Web Service.
2. In the Outbound Web Service list, create a query to display the record with “External Order” in the Name field.
3. Verify that the fields in the Outbound Web Services list match those in the following table.

Namespace	Name	Status
http://siebel.com/asi/	External Order	Active

4. In the Service Ports list, click New, and enter the following values in the fields of the new record.

Field	Comments
Name	Enter a name for the port.
Port Type	Enter External Order.
Transport	Select from the drop-down list. If you want to set up testing, for example when you are customizing applets or extending the ASI, select Local Business Service.
Address	When you select a transport, the field will be populated with a template address. Edit the address based on where you are sending the data.
Binding	If a SOAP header is expected by the receiving application, select SOAP_RPC.

To set up the outbound Quote Web service

1. In the Outbound Web Service list, create a query to display the record with “External Quote” in the Name field.
2. Verify that the fields in the Outbound Web Services list match those in the following table.

Namespace	Name	Status
http://siebel.com/asi/	External Quote	Active

3. In the Service Ports list, review the information in the fields for the External Quote service port and make any changes required for your system.

To set up the inbound Order Web service

1. From Show drop-down list, select Inbound Web Service.
2. In the Inbound Web Service list, create a query to display the record “Siebel Order” in the Name field.
3. Verify that the fields in the Inbound Web Services list match those in the following table.

Namespace	Name	Status
http://siebel.com/asi/	Siebel Order	Active

4. In the Service Ports list, review the information in the fields for the Siebel Order service port and make any changes required for your system.
5. In the Operations list, review the information shown and make any changes required for your system.

To set up the inbound Quote Web service

1 From Show drop-down list, select Inbound Web Service.

2 In the Inbound Web Service list, create a query to display the record “Siebel Quote” in the Name field.

3 Verify that the fields in the Inbound Web Services list match those in the following table.

Namespace	Name	Status
http://siebel.com/asi/	Siebel Quote	Active

4 In the Service Ports list, review the information in the fields for the Siebel Quote service port and make any changes required for your system.

5 In the Operations list, review the information shown and make any changes required for your system.

Activate Workflows for Quote and Orders ASIs

You must activate the following workflow processes used for real-time integration of quotes and orders:

- Get Order Status ASI
- Submit Order ASI
- Submit Quote ASI

To activate workflows used by Quote and Order ASIs

1. From the application level menu, choose View > Site Map > Siebel Business Process Administration > Workflow Processes.
2. In the Workflow Processes list, use a query to find all processes where Name field has contains the word ASI. You can query on *ASI*.
3. For the three workflows listed above, activate each workflow process that has the status Inactive.
   a. Select the workflow process record.
   b. Click Revise.

      A copy of the workflow process record is created with a status of In Progress. The copy is automatically selected.
   c. Click Activate.
   d. Verify that the Status is Active.
4. When you are finished activating workflow processes, restart the server.

About Using Purchase Order Credit Checking Applications

This section tells you how to set up the ability to check the credit standing of customers who want to pay with purchase orders.

Before an order for products or services can be completed through your Siebel application, your company may want to assess whether the customer is in good credit standing to make the purchase on credit. Different applications are used to perform credit checks depending on the method of payment.

- For business customers paying with purchase orders, credit checks on the customer account are performed by a back-office, third-party accounts receivable or credit management application. This chapter describes how to set up these applications.
- For customers paying with a credit card, credit checks are performed by a third-party payment application. This chapter does not include information about how to set up these applications. For more information about third-party payment applications, see *Siebel eSales Administration Guide, MidMarket Edition*.

Third-party accounts receivable or credit management applications use logic to make a credit determination based on your company's previous history with the customer account and other credit data.

Integration with third-party credit checking applications uses a specific, pre-built Application Services Interface (ASI) named External Credit Check. Some configuration is required to set up this integration, but once set up, this functionality should not require any maintenance.

Credit checks are performed as part of the order process at the payment line level, when the user clicks the Credit Check button in an order, and as part of the quote process at the header level, when the user chooses the Verify menu option in a quote.

Two workflows directly control the process of checking the credit status of business accounts. These are:

- Credit Check - Quotes
- Credit Check - Orders

For more information about the quote and order process, including the details of these workflows, see "ASI Workflows" on page 100.

NOTE: Purchase order credit checks can also be made on a quote or order from a customer application, such as Siebel eSales. For information about how to set up a purchase order credit checking integration from a customer application, see *Siebel eSales Administration Guide, MidMarket Edition*.

This section includes the following information:

For more information about to how to set up, use, and modify integrations based on ASIs, see *Application Services Interface Reference: Siebel eBusiness Application Integration Volume VI, MidMarket Edition*.

Required Setup Procedures

To set up the use of third-party credit check application, you must:

- Verify the External Credit Check ASI user properties.
- Configure the Web Service.
- Activate the workflow processes.

Verifying the External Credit Check ASI User Properties

You must verify the External Credit Check ASI user properties.

To verify the External Credit Check ASI user properties

1. In Siebel Tools, select the External Credit Check business service.
2. Select Business Service User Prop.
3. Verify that the Names and Values of the User Properties match those in the following table.

Name	Value
siebel_port_name	Default
siebel_web_service_name	External Credit Check
siebel_web_service_namespace	http://siebel.com/asi/

Configuring Web Services

Web services are used to direct the inbound and outbound messages to and from:

- The third-party credit checking application
- A demonstration script that can be used to test your integration setup
- A middleware or integration server that will integrate with your accounts receivable system

You must make sure that the Web services are correctly configured.

To configure the Web services

1. Navigate to the Web Services Administration screen.
2. From the Show drop-down list, select Outbound Web Services.
3. Select the row with External Credit Check in the Name field.
4. Verify that the fields in the Outbound Web Services list match those in the following table.

Namespace	Name	Status
http://siebel.com/asi/	External Credit Check	Active

5 In the Service Ports list, click New, and enter the following values in the fields of the new record.

Field	Comments
Name	Enter a name for the port.
Port Type	Enter External Credit Check.
Transport	Select from the drop-down list. If you want to set up testing, for example when you are customizing applets or extending the ASI, select Local Business Service.
Address	When you select a transport, the field will be populated with a template address. Edit the address based on whether you are sending the data to middleware, the Credit Check application, and so on. If you want to set up testing, enter Credit Check ASI Test.
Binding	If a SOAP header is expected by the receiving application, select SOAP_RPC. If you are using Credit Check ASI Test, select Property Set.

Activating the Workflow Processes

You must activate the following workflow processes:

- Credit Check - Quotes
- Credit Check - Orders

For information about activating workflows, see "Activate Workflows for Quote and Orders ASIs" on page 89 and *Integration Platform Technologies: Siebel eBusiness Application Integration Volume II, MidMarket Edition*.

For more information about configuring Web Services and setting up demonstration scripts, see *Integration Platform Technologies: Siebel eBusiness Application Integration Volume II, MidMarket Edition*.

Optional Setup Procedures

To set up the use of third-party product accounts receivable systems, you may want to:

- Modify the Credit Check Service business service user properties.
- Turn off credit checking.
- Customize when credit checks are performed.
- Change the account credit auto-approval limit.
- Deactivate fields in the ASI to improve performance.
- Extend the ASI.

NOTE: If you modify any lists of values such as order types or purchase order payment methods, be sure to review the workflows processes in Credit Check - Quotes and Credit Check - Orders to verify that the application logic to determine whether to call credit check is still correct.

Modifying the User Properties

You can modify the user properties for the credit checking integration to, for example, change what code represents an error. To do this, modify the user properties of the Credit Check Service business service using Siebel Tools.

Business Service > Credit Check Service (eSales)

Business Service User Properties

ERROR_CODE = <some other value>

Default error code is 3.

Turning Off Credit Checking

In a quote, credit checking is part of the verify functionality. You can turn it off by by changing the Credit Check user property in the Quotes business component. When the Credit Check user property is set to N instead of Y, the verify function will not perform the credit check.

You can also pick what workflow you want to call to execute the credit check by going to Business Component > Quote and changing the following Business Component User Properties:

- For the Credit Check user property, change the value from Y to N.
- For the Credit Check Workflow user property, change the value from Credit Check Quotes to the workflow you want to use.

In an order, the user performs the credit check by clicking the Credit Check button. To turn off credit check for orders, you can either modify the Credit Check - Order workflow or simply remove the button from the Payment Detail - Purchase Order applet.

Customizing When Credit Checks Are Performed

A credit check does not need to be performed on every quote or order that will be paid for with a purchase order. You can customize when a credit check is performed by modifying the Credit Check - Quotes workflow process and the Credit Check - Orders workflow process.

In the default credit check business processes, credit check will only be performed if all the following conditions apply:

- Payment method is Purchase Order
- The bill-to account's Skip Credit Check flag is Off
- The purchase order amount is greater than the bill-to account's Credit Auto Approval Limit amount

In addition, credit check is not applicable for orders of type RMA and Internal Order, so it will be skipped.

CAUTION: If you decide to modify the Credit Check - Quotes workflow process, it is important to know that this workflow process is also used by Siebel eSales to create an order. For more information about the impact of this, see the section about this workflow process in *Siebel eSales Administration Guide, MidMarket Edition*. If you want to have different workflows for Quotes and eSales, you will need to create an additional workflow.

Changing the Credit Auto-Approval Limit For Accounts

You can change the credit auto-approval limit for accounts in several different ways:

- Using Siebel Tools.

  When your company wants to change the limit for all new accounts, you can change it in Siebel Tools.

  NOTE: Making this change in Siebel Tools does not affect previously existing accounts.

- With a batch eScript.

  If you need to change the value for a large number of account records, you can do so with a batch eScript.

- By manually editing the value for a specific account in the Account screen > Credit Profile view.

  End users can use this method when they only want to change the limit for a few accounts.

NOTE: Do not confuse the Credit Auto Approval Limit field with the PO Auto Approval Limit field.

Skipping Credit Checks For an Account

End users can skip automatic credit checking for particular accounts by changing the value of the Skip Credit Check field. This field is displayed in the Account screen > Credit Profile view. When this check box is checked, it indicates that credit checks should be skipped for the account.

Restricting Which Employees Can Administer Credit Checking

There are two ways to restrict which employees can administer credit checking on accounts:

- Create a read-only version and a read-write version of the Account Detail - Credit Profile view. Give employees who should administer credit checking access to the read-write view. Give employees who should not administer credit checking access to the read-only view.
- Add a rule or logic to restrict who can update fields related to credit checking. For example, only allow an account's primary sales representative to update these fields.

Extending the ASI for Credit Check Interface Request

If you want to extend the ASI, you must add fields to:

- The following external and internal interfaces:
  - Credit Check Interface Response
  - Credit Check Interface Request
- The following internal objects:
  - Credit Check Interface Request - Quote
  - Credit Check Interface Request - Order

This will create the necessary mapping between the Credit Check interface structure and the Siebel Quote and Order business components.

- If you add a field, make sure that the names of the fields in the Internal and External integration objects match. For example, if you want to add the field Priority that maps on quote to Priority-quote and on order to Priority-order, you would do so as follows: Credit Check Interface Request

  Integration Component Field:

  Name: Priority

  External Name: < BLANK >

- Credit Check Interface Request - Quotes

  Integration Component Field:

  Name: Priority

  External Name: < Mapping of Priority to the correct field on Quotes Buscomp >

- Credit Check Interface Request - Orders

  Integration Component Field:

  Name: Priority

  External Name: < Mapping of Priority to the correct field on Quotes Buscomp >

For information about how to extend the integration object, see *Integration Platform Technologies: Siebel eBusiness Application Integration Volume II, MidMarket Edition*.

ASI Workflows

This section documents the workflow processes that are used to invoke the ASIs for quote and order processes. It is not necessary to modify these workflows, but you can modify them to suit your business model.

Get Order Status ASI

This workflow queries the outside system to retrieve the latest information on the order. It returns the new information and synchronizes the order on the current system.

- Query Order By Id: Queries for the order on the current system using the object id. Returns an order property set containing all the order information.
- Isolate Integration Id: In the next step, the workflow will use a query by example. Query by example will take the property set and look for an order with the same exact values for the fields in the property set. If the order has changed on the outside system, those values will no longer match. The workflow needs to query by a value that will not change, the integration id. Isolate Integration Id takes in a property set and removes all the fields, except the integration id.
- External Order Proxy: Using the property set, which only has an integration id now, this step queries by example on the outside systems. Once it finds the order with that integration id, it returns an order property set containing all the order information.
- Synchronize Order: Takes the order property set returned by the previous step and synchronizes it with the order in the current system.

Submit Order ASI

This workflow submits the order to the outside system to synchronize the information between the two systems.

- Query Order By Id: Queries for the order on the current system using the object id. Returns an order property set containing all the order information.
- External Order Proxy: Calls insert on the outside system, passing in the order property set. This step returns an order property set, which will contain any changes the outside system made to the order.

- Synchronize Order: Takes the order property set returned by the previous step and synchronizes it with the order in the current system.

Submit Quote ASI

This workflow submits the quote to the outside system to synchronize the information between the two systems.

- Query For Quote By Id: Queries for the quote on the current system using the object id. Returns a quote property set containing all the quote information.
- External Quote Proxy: Calls insert on the outside system, passing in the quote property set. This step returns a quote property set, which will contain any changes the outside system made to the quote.
- Synchronize Quote: Takes the quote property set returned by the previous step and synchronizes it with the quote in the current system.

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