



# **Siebel eSales Administration Guide Addendum for Industry Applications**

Siebel Innovation Pack 2013

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# 1

## What's New in This Release

This guide describes features of Oracle's Siebel eSales for Siebel Industry Applications that are different from the features of Siebel eSales.

### **What's New in Oracle's Siebel eSales Administration Guide Addendum for Industry Applications, Version 8.1/8.2**

No new features have been added to this guide for this release. This guide has been updated to reflect only product name changes.

### **Additional Resources**

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

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

- *Siebel Order Management Guide Addendum for Industry Applications*
- *Siebel Energy Guide*
- *Siebel Communications Guide*



# 2

## Siebel eSales for Financial Services

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

- Allows financial institutions to market their products to customers.
- Provides a way for customers to apply for those products over the Web.

### Supported Industry Sectors

Siebel eSales for Financial Services supports the following industry sectors:

- Retail finance (banking)
- Healthcare
- Institutional finance
- Insurance

This chapter includes the following topics:

- [“Differences in the Siebel eSales for Financial Services Web Site” on page 7](#)
- [“About the Products Screen” on page 8](#)
- [“About the Applications Screen” on page 10](#)
- [“About the Tools Screen” on page 10](#)

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

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

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

- The Home screen is replaced by the Products screen.
- The Catalog screen is removed.

- The Auctions screen is removed.
- The Applications screen is added.
- The Tools screen is added.

## About the Products Screen

The Home screen of the Siebel eSales Web site is replaced by the Products screen of the Siebel eSales for Financial Services Web site.

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

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



When the customer clicks a hyperlink in the Recommended Products applet, or drills down on a product catalog hyperlink, the product detail view for the selected product appears. In this view, shown in [Figure 1](#), the Add to Cart button of the Siebel eSales Web site is replaced by the Add to Application button of the Siebel eSales for Financial Services Web site.

Add to Application

**Home Equity Line of Credit**

**Description:** Provides home owners an attractive means of financing their home improvements, household expenses, education expenses, or many other financing needs.

[Add To Application](#) [Comparable Products](#)

**Financial Attributes**  
1 - 6 of 6

Name Item	Type	Base Value
Closing Costs & Fees	One Time Fee	\$125.00
Prime Rate	Rate Index	Prime
Life Cap	Interest	20.000%
Term	Term	1-10 years
APR	Interest	11.5%
Borrowing Limit	Principal	\$850,000

**Features And Benefits**  
1 - 2 of 2

Feature	Benefits
Deductible	Earnings on balances applied to monthly maintenance fees
Renovation Loan Available	Convenience of a Complete Banking package for New Customers

**Related Product** 1 - 2 of 2

Figure 1. Product Detail View

When the customer clicks the Add to Application button:

- A quote record is created in the Quotes list of the Quotes screen of Siebel Financial Services employee applications.
- A record is created in the My Applications list of the Web site's Applications screen. For more information about the Applications screen, see ["About the Applications Screen" on page 10](#).

The details of the product are displayed in the Financial Attributes list of the product details view (see [Figure 1](#)). Financial service products may also be assigned dynamic attributes, which are used when the customer performs a parametric search.

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

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

## About the Applications Screen

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

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

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

- Launches the workflow process for user authentication.
- Invokes the Universal Application SmartScript.

**NOTE:** This SmartScript exists in the sample data.

- Creates a record in the Applications list of the Applications screen of the Siebel Financial Services employee application, and associates it with the quote record.
- Removes the records from the My Applications list.

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

## About the Tools Screen

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

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

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

#### Viewing a List of Web Offers

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

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

- 1 Navigate to the Campaign Administration screen, then the Campaigns view.

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

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

- 3 Click the Offers view tab.

This displays a list of offers (see Figure 2).

More Info   Lists   Offers   Contacts/Prospects   Quotas   Responses   Skills   Team   Groups						
New Query 1 - 7 of 7+						
Name	Type	Offer Code	Description	Product	Activation	Expi
Getting Married?	Web - Life Events	1-7EJ7	Looking to buy an engagement ring? How do you pay		11/8/2001	
Having a Baby?	Web - Life Events	1-7EJF	Having a baby is one of the most financially challengi		11/8/2001	
Moving to a New City?	Web - Intentions	1-7EJM	Moving to a new city? Golden Gate Financial can help	Premiere Checking		
Looking to Retire Early?	Web - Intentions	1-7EJQ	Looking to retire early? Golden Gate can help you ple	Millennium Term Life		
Health Classes in 2001	Web - Announceme	1-2U7H	Asthma Management, Travel Abroad and Cancer Mgr			
Golden Gate Insurance News	Web - Announceme	1-GMRW	Golden Gate News on Insurance			
A Great Insurance offer for your sports car!	Web	1-9AQ9	A special insurance offer for sports car owners.	Auto Insurance Gok	12/4/2001	12/21/20

Figure 2. Offers List

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

- **Intentions eAdvisor.** Use this applet to help customers choose products that are relevant to changes they may be planning, such as retirement and relocation.
- **Life Events eAdvisor.** Use this applet to help customers to choose products that are relevant to major life events, such as having a baby, marriage, and graduation.
- **Special Offers.** Use this applet to display special offers.

## Product eAdvisor Applet

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

### Viewing a List of Product eAdvisor SmartScripts

You can view a list of Product eAdvisor SmartScripts that are available for use in the Web site Tools screen (see Figure 3).

### To view a list of Product eAdvisor SmartScripts

- Navigate to the SmartScript Administration screen, then the Scripts view.

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

Figure 3. Scripts List

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

### Mortgage eAdvisor Applet

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

# 3

## Siebel eSales for Communications, Media, and Energy

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

- The Siebel eSales Web site that the customer sees
- The workflows used to capture sales

Topics in this chapter include the following:

- [“Differences in the Siebel eSales Web Site” on page 13](#)
- [“Differences in Order Workflow Processes” on page 15](#)
- [“Energy Price Comparison” on page 15](#)

### Differences in the Siebel eSales Web Site

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

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

- Support for the complex ordering process used in communications, media, and energy, including multiple price types.
- Support for account management needed by business users in these industries.
- Improved customer usability with additional workflows.

#### Support for Complex Ordering Process

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

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

- **Modify and disconnect orders.** The user can make changes to or disconnect active service items.
- **Place supplemental orders.** The user can make changes to orders that have not yet been fulfilled.

- **Ungroup products.** The user can make a bulk order and then change individual items in the bulk order.
- **Associate products with assets.** The additional fields Service ID and Service Point ID are unique identification codes for service or hardware.
- **Multiple price types.** In the energy, media, and communications industries, a service product may have multiple associated price types. They include recurring, nonrecurring, and usage based price types.

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

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

## Support for Complex Account Hierarchies

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

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

### Automatic Account Creation

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

### Account Management

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

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

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

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

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

### Billing and Service Accounts

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

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

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

## Differences in Order Workflow Processes

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

- Order capture
- Checkout
- Order processing

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

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

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

## Energy Price Comparison

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

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





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