



# **Siebel Energy Guide**

Siebel Innovation Pack 2014

November 2014

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# 1

## What's New in This Release

### What's New in Siebel Energy Guide, Siebel Innovation Pack 2014

Table 1 lists the changes in this revision of the documentation to support this release of the software.

**NOTE:** Siebel Innovation Pack 2014 is a continuation of the Siebel 8.1/8.2 release.

Table 1. New Product Features in Siebel Energy Guide, Siebel Innovation Pack 2014

Topic	Description
<a href="#">"Setting Up the Invoice Image Feature in Siebel Energy" on page 192</a>	Modified topic. Includes information about the setup for the Web Center Contact host.
<a href="#">"Viewing Invoice Images From a Billing Profile" on page 199</a>	New topic. Includes information about how to view invoice images from a billing profile.

### What's New in Siebel Energy Guide, Version 8.1/8.2

Table 2 lists the changes described in this version of the documentation to support this release of the software. The new features described in Table 2 are available in Siebel CRM version 8.1.1.11, Siebel CRM version 8.2.2.4, and later.

Table 2. New Product Features in Siebel Energy Guide, Version 8.1/8.2

Topic	Description
<a href="#">"Key Features of Siebel Energy" on page 16</a>	Modified topic. References multi-site quotes in the table row for the business issue relating to order configuration and management.
<a href="#">"Business Functions of Screens in Siebel Energy" on page 20</a>	Modified topic. Describes the Multi-Site Quotes screen.
<a href="#">Chapter 11, "Multi-Site Quotes in Siebel Energy"</a>	New chapter. Describes multi-site quotes and includes the procedures for creating and updating order line items for multi-site quotes.

### Additional Changes

The following documentation changes affect the organization of this guide:

- **Deleted chapter.** *Web Service Reference for Siebel Energy* was deleted because the material in it was moved to *Siebel CRM Web Services Reference*.



# 2

## Overview of Siebel Energy

This chapter presents an overview of Siebel Energy functionality and features. It includes the following topics:

- [“About Siebel Energy” on page 15](#)
- [“Key Features of Siebel Energy” on page 16](#)
- [“Product Modules and Options for Siebel Energy” on page 19](#)
- [“Business Functions of Screens in Siebel Energy” on page 20](#)
- [About Integration of Siebel Energy with Oracle Utilities Customer Care and Billing on page 23](#)
- [Siebel Energy Customer Mapping to Oracle Utilities Customer Care and Billing on page 25](#)
- [Oracle Utilities Customer Care and Billing Product Mapping to Siebel Energy on page 31](#)

### About Siebel Energy

Oracle’s Siebel Energy addresses the customer relationship management needs of the energy and utilities industry. Siebel Energy is designed to meet the sales, marketing, call center, and customer field service requirements of regulated waste management, electric, gas, and water distribution companies, and the requirements of unregulated Energy Service Providers (ESPs). Siebel Energy serves residential, commercial, and industrial customers.

Siebel Energy can support large or small call center operations. Siebel Energy integrates with legacy and packaged Customer Information Systems (CIS) and Billing solutions. Siebel Energy supports account hierarchy and premises records with their service points. Siebel Energy enables customer order and contract management. Siebel Energy also allows the tracking, sharing, and reporting of usage, billing, and other service details.

Oracle’s Siebel Business Applications are designed to work together to provide an integrated Customer Relationship Management (CRM) solution. Siebel Energy allows utility companies to implement Siebel application modules that include sales, service, and marketing functionality. These modules include Oracle’s Siebel Sales, Oracle’s Siebel Service, Oracle’s Siebel Call Center, Oracle’s Siebel Field Service, and Oracle’s Siebel Customer Order Management. Oracle’s Siebel Anywhere allows the Siebel system administrator to apply upgrades to Developer Web Clients, Mobile Web Clients, and Siebel Servers.

## Key Features of Siebel Energy

Table 3 describes how Siebel Energy provides solutions for key business issues.

Table 3. Siebel Energy Solutions for Key Business Issues

Business Issue	Siebel Energy Solutions
Account and Premises management	<ul style="list-style-type: none"> <li>■ Management of accounts through multilevel account hierarchies that are based on complex account relationships</li> <li>■ Independent management of service accounts and billing accounts</li> <li>■ Tracking of physical facilities and network delivery points through premises records</li> <li>■ Tracking of meters at service points</li> <li>■ Management of account and customer information through profiles</li> </ul>
Agreement management	<ul style="list-style-type: none"> <li>■ Automated production of agreements from accepted quotes</li> <li>■ Coordination of pricing information</li> <li>■ Assigning of standard terms, conditions, and features</li> <li>■ Tracking to make sure that agreements and service entitlements are fulfilled</li> </ul>
Audit trail	<ul style="list-style-type: none"> <li>■ Creation of a history of all the changes that have been made to various kinds of information</li> <li>■ Records show who has accessed an item, what operation has been performed, when it was performed, and how the value was changed</li> <li>■ Useful for maintaining security, examining the history of a particular record, and documenting modifications for future analysis and record-keeping</li> </ul>
Billing management	<ul style="list-style-type: none"> <li>■ Integration with back-office billing applications</li> <li>■ Query and display of billing information</li> <li>■ Management of payment information, payment plans, bill adjustments, and bill profiles</li> </ul>
Call center optimization	<ul style="list-style-type: none"> <li>■ Single desktop to manage multiple types of customer interactions</li> <li>■ Computer telephony integration (CTI) to connect callers with the most qualified agent</li> <li>■ Integrated Web and Interactive Voice Response (IVR) self-service functionality</li> </ul>
Credit management	<ul style="list-style-type: none"> <li>■ Integration with a back-office credit application</li> <li>■ Management of credit alerts</li> <li>■ Notification of customers who are delinquent in payments</li> </ul>



Table 3. Siebel Energy Solutions for Key Business Issues

Business Issue	Siebel Energy Solutions
Customer acquisition	<ul style="list-style-type: none"> <li>■ Analytical tools for segmenting prospects and developing targeted campaigns</li> <li>■ Campaign management tools for developing and executing multichannel campaigns</li> <li>■ Prebuilt performance analysis tools</li> <li>■ Call scripting (providing text that uses proactive selling and retention techniques for employees to use when speaking with customers)</li> <li>■ Territory assignment, lead scoring, and routing</li> </ul>
Customer and partner applications	<ul style="list-style-type: none"> <li>■ Oracle’s Siebel Partner Relationship Management, which allows your company to turn channel partners into an extended, virtual sales and service organization through the Internet</li> <li>■ Oracle’s Siebel eService, which allows your customers to create and track their own trouble tickets and service requests, and to search for answers to frequently asked questions (FAQs), through the Internet</li> <li>■ Oracle’s Siebel eSales, which allows your customers to use the Internet to browse through your company’s products and services, and to configure and purchase them</li> </ul>
Customer retention	<ul style="list-style-type: none"> <li>■ Customer profile that is shared throughout the enterprise</li> <li>■ Profile analysis to predict customer churn</li> <li>■ Generation of win-back actions</li> <li>■ Sales tools that increase sales effectiveness and maximize time spent building relationships</li> <li>■ Tools for marketing analysis, campaign development, and execution</li> </ul>
Equipment and infrastructure	<ul style="list-style-type: none"> <li>■ Management of physical assets available at a customer site</li> <li>■ Tracking of equipment sales to accounts</li> <li>■ Management of meters and assets</li> </ul>
Fraud management	<ul style="list-style-type: none"> <li>■ Integration with a back-office fraud management application</li> <li>■ Management of fraud alerts</li> <li>■ Definition of relevant thresholds for customer fraud profiles</li> <li>■ Classification of customer accounts to indicate the likelihood of fraud</li> <li>■ Management of customer accounts that are either late in settlement or delinquent</li> </ul>

Table 3. Siebel Energy Solutions for Key Business Issues

Business Issue	Siebel Energy Solutions
Order configuration and management	<ul style="list-style-type: none"> <li>■ Oracle’s Siebel Configurator, which automates the generation of quotes and sales orders</li> <li>■ Tracking of relationships between sales, sales orders, and work orders</li> <li>■ Definition of process rules and automatic escalation of open sales orders</li> <li>■ Use of product classes and attributes, and product bundles in generating sales orders</li> <li>■ Provisioning of sales orders through work orders</li> <li>■ Multi-site quotes for orders</li> </ul>
Pricing management	<ul style="list-style-type: none"> <li>■ A set of tools for defining pricing adjustments and the conditions under which they are applied</li> <li>■ An engine that evaluates condition statements and determines which pricing adjustments to apply</li> <li>■ A testing area that allows assessment of the pricing adjustments</li> <li>■ Integration with end-user interfaces such as Quotes, Orders, Siebel eSales, Siebel Partner Relationship Management, and Siebel Configurator</li> </ul>
Oracle’s Siebel Marketing	<ul style="list-style-type: none"> <li>■ Analysis of customer information and measurement of campaign results with eIntelligence</li> <li>■ Creation and execution of targeted marketing campaigns</li> <li>■ Internet marketing with eMarketing: Integrated email campaigns, customized Web offers, personalized Web pages, Internet newsletters, and Internet surveys</li> </ul>
Third-party and legacy integration	<ul style="list-style-type: none"> <li>■ Prebuilt Web services that provide interfaces to leading Operating System Software (OSS) and Enterprise Resource Planning (ERP) applications</li> <li>■ Integration mapping tools for cross-application process integration</li> <li>■ Oracle’s Siebel Enterprise Integration Manager (EIM), which allows bidirectional data exchange and synchronization</li> <li>■ Performing credit verification and address validation</li> <li>■ Maintenance of billing accounts through an external billing application</li> </ul>

Table 3. Siebel Energy Solutions for Key Business Issues

Business Issue	Siebel Energy Solutions
Trouble ticket and service request management	<ul style="list-style-type: none"> <li>■ A means of logging, assigning, managing, and resolving customers' problems, including network problems or outages affecting customers</li> <li>■ Online solutions search capability</li> <li>■ Proactive customer notifications through email, pager, fax, and Internet</li> <li>■ Automatic escalation of overdue trouble tickets and service requests</li> <li>■ Integration with external outage management applications</li> </ul>
Upselling and cross-selling	<ul style="list-style-type: none"> <li>■ Scripting engine that identifies upsell and cross-sell opportunities with every customer contact</li> <li>■ Product configuration that prompts the salesperson to propose high-margin services</li> <li>■ Integrated asset management that provides information about configuration at each service location</li> </ul>
Usage, billing, and service detail	<ul style="list-style-type: none"> <li>■ Access to customer usage and service information</li> <li>■ Summary customer data for account analysis</li> </ul>

## Product Modules and Options for Siebel Energy

Many Siebel Business Applications modules can be purchased and used with Siebel Energy. In addition, optional modules specific to Siebel Energy can be purchased to provide enhanced functionality for various business processes. For information about the optional modules that can be used with Siebel Energy, contact your Siebel sales representative.

**NOTE:** This guide documents Siebel Energy with the optional modules installed. In addition, the Sample database includes data for optional modules. If your installation does not include some of these modules, then your software interface differs from that described in some topics of this guide.

The exact configuration of Siebel Energy screens and views depends on your company's configuration of the application. For introductory information about using the Siebel Energy interface, see *Siebel Fundamentals*.

**NOTE:** The Siebel Bookshelf is available on Oracle Technology Network (<http://www.oracle.com/technetwork/indexes/documentation/index.html>) and Oracle Software Delivery Cloud. It might also be installed locally on your intranet or on a network location.

# Business Functions of Screens in Siebel Energy

The Siebel Energy interface includes procedure-specific screens. Some screens are used exclusively by administrators. [Table 4](#) lists the most frequently used Siebel Energy screen and views and the functions of the views in those screens.

**NOTE:** The procedures in this guide assume that you do not use left-hand navigation. However, you can set up left-hand navigation. For more information about left-hand navigation and about implementing it, see *Siebel Fundamentals for Siebel Open UI*.

Table 4. Siebel Energy Screens and Views

Screen	Functions	For More Information
Accounts	Create, view, and update accounts. Set up and maintain account hierarchies. Define and maintain account profile information. Query customer bills. Record bill payments, repayment plans, and adjustments.	See <a href="#">Chapter 3, "Accounts in Siebel Energy"</a> , <a href="#">Chapter 4, "Profiles in Siebel Energy"</a> , and <a href="#">Chapter 13, "Billing in Siebel Energy."</a>
Activities	Track personal activities and view activities for other team members. Track the progress of accounts, trouble tickets, service requests, interactions with contacts, and opportunities.	See <i>Siebel Applications Administration Guide</i>
Agreements	Create, generate, modify, approve, and track agreements.	See <a href="#">Chapter 6, "Agreements and Entitlements in Siebel Energy."</a>
Assets	Manage information about products sold to accounts.	See <i>Siebel Field Service Guide</i>
Audit Trail	Creates a history of the changes that have been made in Siebel Energy.	See <i>Siebel Applications Administration Guide</i>
Briefings	Gather and format information from a number of different sources, both inside and outside your company, including the World Wide Web.	See <i>Siebel Briefings Administration Guide</i>
Calendar	Create and display activities (including to-do activities) and share calendar information with co-workers.	See <i>Siebel Fundamentals</i>
Campaigns	Manage outbound communications with prospects targeted for a particular marketing effort.	See <i>Siebel Applications Administration Guide</i>

Table 4. Siebel Energy Screens and Views

Screen	Functions	For More Information
Contacts	Record and track business and personal contact information associated with an account, an opportunity, a trouble ticket, or service request.	See <a href="#">Chapter 5, "Contacts in Siebel Energy."</a>
Credit Management	Manage and monitor customer credit issues. Share data with third-party credit management applications.	See <a href="#">Chapter 16, "Credit Management in Siebel Energy."</a>
Entitlements	Associate entitlements with accounts, contacts, and products. Determine a customer's eligibility for service under its entitlements.	See <a href="#">Chapter 6, "Agreements and Entitlements in Siebel Energy."</a>
Expense Reports	Manage expense-report information for your own expenses, or your team's expenses.	See <i>Siebel Applications Administration Guide</i>
Forecasts	Create business forecasts that are based on opportunities or products.	See <i>Siebel Applications Administration Guide</i>
Fraud Management	Manage and monitor customer fraud issues. Share data with third-party fraud management applications.	See <a href="#">Chapter 17, "Fraud Management in Siebel Energy."</a>
Literature	Display company- and industry-related literature cataloged by the Siebel administrator.	See <i>Siebel Applications Administration Guide</i>
Multi-Site Quotes	Create and manage quotes for multiple sites.	See <a href="#">Chapter 11, "Multi-Site Quotes in Siebel Energy."</a>
Opportunities	Manage sales opportunities for business and residential customers.	See <a href="#">Chapter 10, "Opportunities in Siebel Energy."</a>
Orders	Create sales orders and track their status. Generate order summaries.	See <i>Siebel Order Management Guide</i> and <i>Siebel Order Management Guide Addendum for Communications</i>
Premises	Create and maintain premises. Track service points, customer premises equipment, and meters associated with a premises.	See <a href="#">Chapter 7, "Premises in Siebel Energy."</a>
Price Comparison	Creates quotes comparing in-house rate plans against competitors' rates	See <a href="#">Chapter 12, "Price Comparison in Siebel Energy."</a>

Table 4. Siebel Energy Screens and Views

Screen	Functions	For More Information
Products	Display products, product lines, product features, and price lists.	See <a href="#">Chapter 8, "Products in Siebel Energy."</a> Also see <i>Siebel Order Management Guide</i> and <i>Siebel Order Management Guide Addendum for Communications</i>
Quality	Manage information about adverse events or reactions related to products.	See <i>Siebel Applications Administration Guide</i>
Quotes	Create, view, and update quotes. Update opportunities and configure solutions for quotes.	See <i>Siebel Order Management Guide</i> and <i>Siebel Order Management Guide Addendum for Communications</i>
Service Requests	Create, display, and update customer requests for information about or assistance with products or services.	See <a href="#">Chapter 15, "Service Requests and Trouble Tickets in Siebel Energy."</a>
SmartScripts	Define the application workflow for an interactive situation in a script. These interactive situations can include inbound communications (such as customer service) and outbound contacts (such as telemarketing).	See <i>Siebel SmartScript Administration Guide</i>
Solutions	Search, organize, and add to a knowledge base of answers to service requests and trouble tickets.	See <i>Siebel Field Service Guide</i>
Trouble Tickets	Create, display, and update customer requests for information about or assistance with products or services.	See <a href="#">Chapter 15, "Service Requests and Trouble Tickets in Siebel Energy."</a>
Work Orders	Manage the work components associated with activating or turning off service for a customer.	See <a href="#">Chapter 14, "Work Orders in Siebel Energy."</a>

# About Integration of Siebel Energy with Oracle Utilities Customer Care and Billing

This topic is an overview of the integration of Siebel Energy with Oracle® Utilities Customer Care and Billing, a customer and billing application that manages billing and other aspects of customer care needed by utility companies to operate their businesses. Basic objects such as Person, Account, Premise, Service Agreement, and Service Point form the core of Oracle Utilities Customer Care and Billing. The objects hold demographic, geographic, and financial information about the customers and properties serviced by a utility company. Related to these objects are the processes that they manage, including bills, payments, meter readings, field activities, and so on.

The integration occurs through Oracle® Application Integration Architecture, a set of products that enables you to set up and orchestrate cross-application business processes so that multiple applications can work together. Oracle Application Integration Architecture runs on Oracle® Fusion Middleware.

Oracle's Process Integration Packs (PIPs) are the mechanisms of the integration. PIPs are prebuilt packaged process integrations between Oracle applications, such as Siebel applications, and external applications. PIPs are based on Oracle Application Integration Architecture. The following PIPs enable the synchronization of customer and product Information, respectively, between Siebel Energy and Oracle Utilities Customer Care and Billing:

- Oracle Customer Data Synchronization Integration Pack for Oracle Utilities Customer Care and Billing and Siebel Energy
- Oracle Product Data Synchronization Integration Pack for Oracle Utilities Customer Care and Billing and Siebel Energy

These PIPs run the following process integrations:

**Customer Data Management Process Integration.** This process integration enables the synchronization of customer information between Siebel Energy and Oracle Utilities Customer Care and Billing. Siebel Energy is the customer master. In other words, customer records and customer-related information records are created in Siebel Energy and sent to Oracle Utilities Customer Care and Billing. Customer information updates in Siebel Energy are synchronized to Oracle Utilities Customer Care and Billing.

The Customer Data Management process integration provides two integration flows. The Create/Synchronize Customer integration flow transmits customer information that is processed during customer order management operations in Siebel Energy to create customer records in Oracle Utilities Customer Care and Billing. The Update Customer process integration updates customer information such as name, address, contact, billing frequency, payment method, payment details (depending on payment method), bill media, and bill type from Siebel Energy to existing customer records in Oracle Utilities Customer Care and Billing.

**Product Data Management Process Integration.** This process integration enables the synchronization of product and pricing information between Oracle Utilities Customer Care and Billing and Siebel Energy to support the Order-to-Bill process. Oracle Utilities Customer Care and Billing is the product and pricing master of the products managed by the integration. In Siebel Energy, this information is enriched and supports sales. The basic product and pricing information synchronized from Oracle Utilities Customer Care and Billing is supplemented in Siebel Energy to create and manage bundles of products, product configuration models, product eligibility and compatibility rules, product recommendations (that is, up-sell and cross-sell guidance), promotions (that is, pricing discounts), and product catalogs.

The Product Data Management process integration provides the Synchronize Product and Pricing integration flow. This integration flow transmits product and pricing information in Oracle Utilities Customer Care and Billing to Siebel Energy to create product and pricing records in the Siebel application.

This topic and the following topics provide an overview of the integration, with a focus on the Siebel application:

- [“Siebel Energy Customer Mapping to Oracle Utilities Customer Care and Billing” on page 25](#)
- [“Oracle Utilities Customer Care and Billing Product Mapping to Siebel Energy” on page 31](#)

For more information about how to set up the integration of Siebel Energy and Oracle Utilities Customer Care and Billing, see the Oracle Application Integration Architecture documentation and *Siebel Installation Guide* for the operating system you are using.

## Setting the System Preference for Integration

Administrators must set system preference values. The system preference described in this topic controls aspects of Oracle Application Integration Architecture integration functionality. For more information about system preferences, see *Siebel Applications Administration Guide*.

### *To set the system preference for integration*

- 1 Navigate to the Administration - Application screen, then the System Preferences view.
- 2 Query for the Oracle Application Integration Architecture integration system preferences, and set the appropriate value for each.

The Oracle Application Integration Architecture integration system preference for Siebel Energy is described in the following table.

System Preference	Comments
Enable AIA Utility	Enables or disables the CC&B Customer and Product Sync PIP. The default value is FALSE. To enable the CC&B Customer and Product Sync PIP, change the value to TRUE.

- 3 Set other system preferences, if necessary.



- 4 Restart the Siebel Server.

## Siebel Energy Customer Mapping to Oracle Utilities Customer Care and Billing

This topic describes the Customer Data Management process integration that synchronizes customer information between Siebel Energy and Oracle Utilities Customer Care and Billing. This topic includes the following information:

- [About Managing Integrated Customers on page 25](#)
- [Sequence for Creating Integrated Customers on page 26](#)
- [Sequence for Updating Integrated Customers on page 26](#)
- [Customer Data Mapping from Oracle Utilities Customer Care and Billing to Siebel Energy on page 27](#)

### About Managing Integrated Customers

The Customer Data Management process integration between Siebel Energy and Oracle Utilities Customer Care and Billing enables the synchronization of customer information to support the Order-to-Bill process. Siebel Energy is the customer master. Customer records are created in Siebel Energy and sent to Oracle Utilities Customer Care and Billing through the integration. For customers that have already been created in Oracle Utilities Customer Care and Billing, customer information updates in Siebel Energy are likewise synchronized to Oracle Utilities Customer Care and Billing. However, customer information updates in Oracle Utilities Customer Care and Billing are not synchronized back to Siebel Energy. Utility companies must maintain primary customer information in Siebel Energy, thus enabling order capture in Siebel Energy.

The initial synchronization of customer information from Siebel Energy to Oracle Utilities Customer Care and Billing occurs *only* during the order management integration flow. This design prevents synchronization of prospect data from Siebel Energy to Oracle Utilities Customer Care and Billing.

The integration flows that manage this process function as follows:

- **Create/Synchronize Customer Integration Flow.** A customer record is initially created in Siebel Energy as part of a sales cycle. A sales representative captures customer account information including name, address, contact, billing profile, and statement profile. The customer information is initially synchronized from Siebel Energy to Oracle Utilities Customer Care and Billing during order processing, and not before. This synchronization is initiated through the billing account defined on the order line item.
- **Update Customer Integration Flow.** When the customer service representative updates customer information (that is, account, address, contact, statement profile or billing profile) in Siebel Energy, these changes are communicated to Oracle Utilities Customer Care and Billing in real-time through the customer management process integration. However, this update customer process occurs only for customers that have already been synchronized from Siebel Energy to Oracle Utilities Customer Care and Billing.

## Sequence for Creating Integrated Customers

The Create/Synchronize Customer integration flow sends customer information from the customer order management processing flow in Siebel Energy to Oracle Utilities Customer Care and Billing. The process of creating integrated customers includes the following steps:

- 1** The customer record is initially created in Siebel Energy as part of a sales cycle.

The sales representative captures account information including name, address, contact, and billing profile. Additionally, the sales representative might capture an account hierarchy. This hierarchy represents parent-child relationships between multiple accounts (for example, a business with multiple locations), and other information, such as marketing data that is not directly related to order provisioning and billing.
- 2** The customer information is initially synchronized from Siebel Energy to Oracle Utilities Customer Care and Billing during order processing.

The Create/Synchronize Customer integration flow identifies the accounts to be synchronized from Siebel Energy to Oracle Utilities Customer Care and Billing. These account records are determined by the various billing accounts captured on the order line items and whether these accounts currently exist in Oracle Utilities Customer Care and Billing.
- 3** From Siebel Energy, the Create/Synchronize Customer integration flow requests the customer information to send to Oracle Utilities Customer Care and Billing.
- 4** The Create/Synchronize Customer integration flow sends the customer information to Oracle Utilities Customer Care and Billing
- 5** Person and account objects are created in Oracle Utilities Customer Care and Billing from the Siebel Energy customer data.

## Sequence for Updating Integrated Customers

The Update Customer integration flow sends updates of customer information such as name, address, contact, billing profile, and payment profile from Siebel Energy to Oracle Utilities Customer Care and Billing. This customer update process occurs *only* for customers that have previously been synchronized from Siebel Energy to Oracle Utilities Customer Care and Billing through the customer order management processing flow. The process of updating integrated customers includes the following steps:

- 1** In Siebel Energy, a customer service representative updates demographic data or billing profile information about an existing customer.
- 2** If the customer is a billable customer, then the changes are automatically sent in real time to Oracle Utilities Customer Care and Billing.

If the customer is not a billable customer, then no changes are transmitted to Oracle Utilities Customer Care and Billing.
- 3** Existing person and account objects are updated in Oracle Utilities Customer Care and Billing from the modified Siebel Energy customer data.

## Customer Data Mapping from Oracle Utilities Customer Care and Billing to Siebel Energy

This topic describes the data mapping of key objects from order line items in Siebel Energy to Oracle Utilities Customer Care and Billing. [Table 5](#) summarizes how values from the Siebel Energy order line items are used in Oracle Utilities Customer Care and Billing.

Table 5. Siebel Energy Data Mappings to Oracle Utilities Customer Care and Billing

Siebel Energy Data	Use in Oracle Utilities Customer Care and Billing
Action	To define the Action Code that describes the requested activity.
Product	To define the Rate Schedule for the Service Agreement.
Service Account Service Point Service ID	To identify the Premises and Service Point.
Billing Account	To define the Person and Account.
Billing Profile	Not used from the order line item. Oracle Utilities Customer Care and Billing uses the primary billing profile for the billing account.
Status	To define the Provisioning Status.
Service Start Date Service End Date	To define the Effective Time Period for the Rate Schedule on the Service Agreement.

Further details of the data mapping are described in the subtopics that follow.

### Account

The integration sends the relevant billing-related account information from Siebel Energy to Oracle Utilities Customer Care and Billing, as follows:

- The customer information to be synchronized to Oracle Utilities Customer Care and Billing is determined by information captured at the order line item level. In particular, it is determined by the billing account of the order line item.
- The billing account defined on the order line item level in Siebel Energy is an account record with an Account Class value of Customer or Billing. The integration uses the Siebel Energy billing account to create the person, account, and account-person relationship in Oracle Utilities Customer Care and Billing if they do not already exist.
- The customer account hierarchy defined in Siebel Energy is not maintained in Oracle Utilities Customer Care and Billing. A Person record in Oracle Utilities Customer Care and Billing has only one account. However, each account can have multiple service agreements.
- The account number for the billing account in Siebel Energy is passed to Oracle Utilities Customer Care and Billing, so it can be placed on customer invoices.

- The account Status value in Siebel Energy is not sent to Oracle Utilities Customer Care and Billing. Status is not directly tracked in Oracle Utilities Customer Care and Billing at the person or account level. Status in Oracle Utilities Customer Care and Billing can be determined indirectly by the status of the service agreements associated with the account. For example, if all the service agreements for an account are closed, then the account can be considered to a status of inactive.
- The service account defined on the order line item level in Siebel Energy is an account record with an Account Class value of Customer or Service. Service account in Siebel Energy is not used to define the person and account within Oracle Utilities Customer Care and Billing. Instead, service account is used to indirectly identify the service point and related premises for a particular service on the order line item.

**NOTE:** In Siebel Energy, a premises is associated with a service account when the service account is created. Additionally, the service account, premises, and service point relationship (in other words, the service account and service point on the order line item) is used during order processing to define where the service is delivered.

### Account Address

The integration sends the relevant billing-related address information from Siebel Energy to Oracle Utilities Customer Care and Billing, as follows:

- The integration does not send all the billing account addresses from Siebel Energy to Oracle Utilities Customer Care and Billing. Address information sent from Siebel Energy to Oracle Utilities Customer Care and Billing is determined by the address selected on the primary billing profile of the billing account and by the existence of any seasonal addresses for the account. In Oracle Utilities Customer Care and Billing, address information is captured on the person and designated on the account-person relationship.
- A Billing Address is required on the billing profile in Siebel Energy. Therefore, the person in Oracle Utilities Customer Care and Billing always has one billing address.
- If address information for the primary billing profile that has already been sent to Oracle Utilities Customer Care and Billing is updated in Siebel Energy, then the address of the corresponding person in Oracle Utilities Customer Care and Billing is updated in real time.

### Contact

The integration sends the relevant billing-related contact information from Siebel Energy to Oracle Utilities Customer Care and Billing, as follows:

- The integration does not send all the billing account contacts from Siebel Energy to Oracle Utilities Customer Care and Billing. Contact information sent from Siebel Energy to Oracle Utilities Customer Care and Billing is determined by the contact information defined on the primary billing profile of the billing account. In Oracle Utilities Customer Care and Billing, the name of the billing contact is captured as the Override Mail Name on the person record.
- A Billing Contact value is not required on the billing profile. Therefore, an Override Mail Name value might not exist on the Person record in Oracle Utilities Customer Care and Billing.

- If contact information for the primary billing profile that has already been sent to Oracle Utilities Customer Care and Billing is updated in Siebel Energy, then the Override Mail Name for the corresponding person in Oracle Utilities Customer Care and Billing is updated in real time.

### Billing Profile

The integration sends the relevant billing-related billing profile information from Siebel Energy to Oracle Utilities Customer Care and Billing, as follows:

- Billing profile information (including billing type, bill medium, bill frequency, billing address, billing contact, and payment details) from Siebel Energy is primarily captured on the person, account, and account person relationship objects in Oracle Utilities Customer Care and Billing.
- Siebel Energy supports multiple billing profiles for a billing account. These billing profiles can be explicitly selected at the order line item level (that is, by product).
- Oracle Utilities Customer Care and Billing does not support multiple sets of billing and payment information for a service agreement. Therefore, only the primary billing profile for a billing account in Siebel Energy is synchronized to Oracle Utilities Customer Care and Billing. Billing profiles other than the primary one are ignored by the integration.
- If primary billing profile information that has already been sent to Oracle Utilities Customer Care and Billing is updated in Siebel Energy, then the corresponding information in Oracle Utilities Customer Care and Billing is updated in real time. These changes might include the changes described in ["Account Address" on page 28](#) and ["Contact" on page 28](#).
- Oracle Utilities Customer Care and Billing maintains a history of account automatic payment information. Therefore, payment information changes in Siebel Energy result in new automatic payment records in Oracle Utilities Customer Care and Billing. If payment information is changed in Siebel Energy, then the prior automatic payment record in Oracle Utilities Customer Care and Billing is updated with an end date, and a new automatic payment record is created.

**NOTE:** A billing profile must be defined in Siebel Energy for every account that is used as a billing account on order line items.

### Multiple Bill Recipients

In addition to sending bills to a primary bill recipient, defined as the Billing Account Address listed under the primary Billing Profile in Siebel Energy, a utility company can send duplicate bills to specific contacts as additional or secondary bill recipients. Oracle Utilities Customer Care and Billing supports this functionality. Each secondary bill recipient can have only one address in Oracle Utilities Customer Care and Billing.

In Siebel Energy, additional bill recipients are defined as contacts in the Account Statement Profile view. The integration of customer data between Siebel Energy and Oracle Utilities Customer Care and Billing supports the synchronization of the Contact Address, Contact Name, Bill Media, Email Address, Bill Type, and Language fields.

**NOTE:** To allow valid integration with Oracle Utilities Customer Care and Billing, Statement Profile records in Siebel Energy must not share the same contacts. You can configure your Siebel application to prevent duplication of contacts across multiple Statement Profile records in Siebel Energy. For more information about the steps to configure Siebel Energy to prevent duplication of Contacts across multiple Statement Profile records, see *Siebel Installation Guide* for the operating system you are using.

### Seasonal Address

Utility companies can send bills to alternate addresses during specific periods of the year, as requested by their customers. These seasonal periods, recurring annually, can be captured in Siebel Energy for both the primary and secondary bill recipients. The integration to Oracle Utilities Customer Care and Billing supports the synchronization of seasonal address information. This synchronization enabled the billing solution to send the bill to the specified seasonal address depending on the time of year.

In Siebel Energy, a seasonal address is defined as an address with the type Seasonal that has been entered for a billing account defined as a primary bill recipient, or for a contact defined as a secondary bill recipient. Address types can be defined in the Addresses view of the Accounts screen and in the Addresses view of the Contacts screen. Multiple seasonal addresses can be associated with an account or a contact.

The Start Date and End Date fields of the Address record are required fields for addresses with the type Seasonal. Because the seasonal period is a recurring annual period, only the Month and Day values of the date fields are used to define the period. These values are passed to Oracle Utilities Customer Care and Billing for integrated customers. Users of Siebel Energy can enter any year in those fields without affecting the period definition.

In Siebel Energy, users can select an address with the type Seasonal in the primary billing profile of an account to make it the default address for the primary bill recipient. Similarly, users can select an address with the type Seasonal in a Contact record in the statement profile to make it the default address for secondary bill recipients. In this case, there is no need for a user to change the address type, because Oracle Utilities Customer Care and Billing makes sure that the address is no longer considered as seasonal regardless of the setting in Siebel Energy.

Although multiple seasonal addresses can be associated with an account or a contact, Oracle Utilities Customer Care and Billing can send a bill to only one seasonal address at any time. To prevent the creation of period overlaps in Siebel Energy, and to prevent the selection of February 29 in a leap year as either a Start Date or End Date for a period, utility companies can deploy a script. For an example script to prevent seasonal period overlap, see *Oracle Customer Data Synchronization Integration Pack for Oracle Utilities Customer Care and Billing and Siebel Energy - Implementation Guide* in the Oracle Application Integration Architecture documentation.

The integration of Siebel Energy and Oracle Utilities Customer Care and Billing does not support the use of the same address for two different seasonal periods in the year.

# Oracle Utilities Customer Care and Billing Product Mapping to Siebel Energy

This topic describes the Product Data Management process integration that synchronizes product information between Oracle Utilities Customer Care and Billing and Siebel Energy. This topic includes the following information:

- [About Managing Integrated Products on page 31](#)
- [Sequence for Creating Integrated Products on page 32](#)
- [Sequence for Updating Integrated Products on page 33](#)
- [Product Data Mapping from Oracle Utilities Customer Care and Billing to Siebel Energy on page 34](#)

## About Managing Integrated Products

The Product Data Management process integration between Oracle Utilities Customer Care and Billing and Siebel Energy enables the synchronization of product information. Oracle Utilities Customer Care and Billing is the product master. Product records are created in Oracle Utilities Customer Care and Billing and sent to Siebel Energy through the integration. For products that have already been created in Siebel Energy, product information updates in Oracle Utilities Customer Care and Billing are likewise synchronized to Siebel Energy.

After products are integrated between Siebel Energy and Oracle Utilities Customer Care and Billing, the utility company uses them as follows:

- The product administrator uses Oracle Utilities Customer Care and Billing to maintain rate and billing details and define products.
- Rate and billing details and products are synchronized in only one direction, from Oracle Utilities Customer Care and Billing to Siebel Energy.
- The product administrator uses Siebel Energy to create product bundles and to define other features of the product, such as product eligibility and compatibility, cross-sell recommendations, and up-sell recommendations. Product bundles can include products that are managed in Oracle Utilities Customer Care and Billing and products that are provisioned and billed in other applications.
- Sales representatives use Siebel Energy to create quotes and orders for the product.
- The utility company uses Oracle Utilities Customer Care and Billing to capture the rates for products and to bill customers.

## Sequence for Creating Integrated Products

This topic provides an overview of the sequence for creating integrated products. For more information about creating products in Oracle Utilities Customer Care and Billing and synchronizing product information with Siebel Energy, see *Oracle Product Data Synchronization Integration Pack for Oracle Utilities Customer Care and Billing and Siebel Energy - Implementation Guide* in the Oracle Application Integration Architecture documentation.

To create a new product, the company uses the integrated products as follows:

- The product administrator maintains rates and billing details in Oracle Utilities Customer Care and Billing. Rate and billing data include the following:
  - Agreement Type
  - Rate (includes Rate Schedule, Rate Version, Rate Component, Bill Factors)
  - Service Agreement Type Start Option (includes Start Option, Recurring Charge Amount, Contract Rider, Contract Value, Contract Quantity, Characteristics).

This information is used to define the Service Agreement in Oracle Utilities Customer Care and Billing that is used for pricing and for billing customers.

- The product administrator creates a new product in Oracle Utilities Customer Care and Billing (called a product offer in Oracle Utilities Customer Care and Billing), validates the product offer, and publishes it. To determine how to define the product, the administrator must consider the following:
  - How the product must be set up in Oracle Utilities Customer Care and Billing for pricing and invoicing
  - Whether the product is part of a larger product offering, a product bundle, or a promotional offering defined in Siebel Energy
  - What product attributes or characteristics have an influence on product eligibility and compatibility, defined in Siebel Energy
  - What non-product attributes affect prices or trigger charges, such as contract duration with penalty, duration of promotional pricing, bundle pricing with unbundling penalties, eBilling option, and automatic payments
- When the administrator publishes the product offer in Oracle Utilities Customer Care and Billing, the integration layer creates the equivalent product in Siebel Energy.
- The product administrator can use Siebel Energy to associate the product with the following:
  - Product Catalogs
  - Configuration models
  - Eligibility and compatibility rules
  - Product recommendation rules
  - Promotions



#### ■ Loyalty Programs

Products must be in product catalogs to be used in quotes or orders. The other features are optional and are defined when they are needed to support utility company requirements for management and sales of product offerings. For more information, see *Siebel Order Management Guide*, *Siebel Product Administration Guide*, and *Siebel Loyalty Administration Guide*.

- The product administrator uses Siebel Energy to release the product version. For more information, see *Siebel Product Administration Guide*.
- After the product is released, sales representatives use Siebel Energy to create quotes and place orders. For more information, see [Chapter 14, "Work Orders in Siebel Energy"](#) and *Siebel Order Management Guide*.
- The utility company uses Oracle Utilities Customer Care and Billing to bill customers.

## Sequence for Updating Integrated Products

The product administrator updates integrated products using process similar to the one described for creating products:

- The product administrator maintains rates and billing details in Oracle Utilities Customer Care and Billing.
- The product administrator updates the product offer in Oracle Utilities Customer Care and Billing.
- When the administrator saves the product offer in Oracle Utilities Customer Care and Billing, the integration layer updates the equivalent product in Siebel Energy.
- The administrator can use Siebel Energy to modify other features associated with the product, if necessary.
- The administrator uses Siebel Energy to release the new product version.
- Sales representatives use Siebel Energy to create quotes and place orders for the updated product.
- The utility company uses Oracle Utilities Customer Care and Billing to bill customers for the updated product.

## About Inactivating Integrated Products

If a product is no longer available, then it is recommended that you inactivate that product in Oracle Utilities Customer Care and Billing, rather than deleting it. You can inactivate a product by setting its Effective End Date as the last day the product is active. When the change is published, the integration updates the Effective End Date of the product in Siebel Energy.

**CAUTION:** Products in Siebel Energy cannot be deleted or have their Active fields deselected through the integration.

## Product Data Mapping from Oracle Utilities Customer Care and Billing to Siebel Energy

This topic provides an overview of the integrated product data that is created or updated in Siebel Energy. For more information about the creation and synchronization of integrated product data, see *Oracle Product Data Synchronization Integration Pack for Oracle Utilities Customer Care and Billing and Siebel Energy - Implementation Guide* in the Oracle Application Integration Architecture documentation.

### Product Structure

The product structure created in Siebel Energy is based on the product component definition in Oracle Utilities Customer Care and Billing. The product component is used to identify what dynamic values Oracle Utilities Customer Care and Billing expects from an external application to support rating and billing. The integration process creates different product structures in Siebel Energy to allow it to capture the dynamic values to be used by Oracle Utilities Customer Care and Billing. The integration process creates the product structure in Siebel Energy as follows:

If the product offer in Oracle Utilities Customer Care and Billing has no product components defined to capture a pricing-related contract value, then the integration process creates a simple product in Siebel Energy.

If the product offer in Oracle Utilities Customer Care and Billing has one or more product components defined to capture a pricing-related contract value, then the integration process creates a customizable product in Siebel Energy. The structure of the customizable product in Siebel Energy is based on the product offer, with a child product that relates to the pricing-related product component in Oracle Utilities Customer Care and Billing.

**NOTE:** Decisions about how to implement dynamic rating and pricing of products are highly implementation specific. Integration of the external, dynamic rating values related to product components in Oracle Utilities Customer Care and Billing are outside the scope of the Product Data Integration PIP. For more information, see *Oracle Product Data Synchronization Integration Pack for Oracle Utilities Customer Care and Billing and Siebel Energy - Implementation Guide* in the Oracle Application Integration Architecture documentation.

### Product Mapping

Some fields in the Product record in Siebel Energy are populated with product information in Oracle Utilities Customer Care and Billing, including Product Name, Product Description, Service Type, Start and End Dates, as well as any Component Product's Name and Description.

Other product fields are left with their default values or with results from the processing of the integration. For more information about product mapping, see *Oracle Product Data Synchronization Integration Pack for Oracle Utilities Customer Care and Billing and Siebel Energy - Implementation Guide* in the Oracle Application Integration Architecture documentation.

### Pricing

Oracle Utilities Customer Care and Billing maintains the product rate structures and prices used for rating and billing.

The integration layer creates one price list in Siebel Energy for all products that are created by the Oracle Utilities Customer Care and Billing integration, but this price list is not used for pricing. The List Price field on the price list is left blank. The price list must be created because Siebel Energy displays a product in catalogs, allowing it to be used in quotes and orders, *only* if the product is on a price list.

Component products are not associated with a price list, because they are not required to be visible independently of their parent products.

Rate structure and price information for the products mastered in Oracle Utilities Customer Care and Billing can be described in the product description fields in Siebel Energy. This description provides Sales representatives with the information they need to discuss product options with a customer or prospect.



# 3

## Accounts in Siebel Energy

This chapter defines some basic concepts about accounts. It also provides the procedures for setting up account hierarchies and updating account information. It includes the following topics:

- [“About Accounts in Siebel Energy” on page 37](#)
- [“Scenario for Using Accounts in Siebel Energy” on page 41](#)
- [“Setting Up External Organizations for Siebel Energy” on page 43](#)
- [“Creating an Account in Siebel Energy \(End User\)” on page 44](#)
- [“Creating an Account Hierarchy in Siebel Energy \(End User\)” on page 46](#)
- [“Reviewing an Account Hierarchy in Siebel Energy \(End User\)” on page 47](#)
- [“Accessing or Updating Account Information in Siebel Energy \(End User\)” on page 48](#)
- [“Monitoring Infrastructure, Equipment, and Usage in Siebel Energy \(End User\)” on page 49](#)

### About Accounts in Siebel Energy

Administrators, such as call center administrators, sales administrators, and sales managers, benefit from reading this chapter. It describes how customer service representatives (end users) enter information into the accounts screens, which form the hub of customer information. After becoming familiar with the end-user procedures, you can customize the software to fit the needs of your company.

An *account* is any external organization with which your company does business. It negotiates agreements, receives service and bills, and raises trouble tickets. An account is usually the central entity of a Siebel CRM implementation. After adding accounts in Siebel Energy, end users at your company contribute information for tracking customer service, processing requests, viewing agreements, and so on.

#### Account Hierarchy

A single account for each customer probably meets your company’s needs to track the accounts of residential customers. However, for large commercial clients, end users can build an account hierarchy. An *account hierarchy* is a multilevel structure reflecting parent-child relationships within the organization.

Within a complex account hierarchy, an account usually represents one of the following entities:

- A customer, prospective customer, or household
- An individual service or billing account
- An aggregate account for billing or service accounts
- A division in an organization

- An entire organization

Hierarchies can accommodate subsidiaries and complex organizations that have, for example, a world headquarters, multiple regional headquarters, and many branch locations, each with its own service and billing requirements.

This multiple-level structure supports a top-down view of the customer. Separate child accounts can be used to designate which information pertains to one subsidiary or another within the organization.

A hierarchy has the following further advantages:

- It allows you to maintain customer information, such as address and contact name at each point in the hierarchy.
- It aids in specifying usage and billing roll-up relationships.
- It allows you to create and maintain aggregation points and to support complex discounting methods.

To fully support mergers, demergers and corporate restructuring, Siebel Energy automatically updates the master account or parent account of an account record and its children when the changes are made to the account hierarchy. In particular, it is possible to change the parent of a child account if that subsidiary is sold to another holding company, or to change the parent of a whole organization if it is purchased by another entity. These changes take effect by changing the parent account of the account record.

### Account Classes

An *account class* is a method for classifying an account according to its position and role in an account hierarchy. When setting up the hierarchy, end users define parent-child relationships among the accounts. Then they designate which account class applies to each new account, according to your customer's requirements and organizational structure.

For example, with energy companies, it is common for the service to be delivered to one subsidiary while bills get sent to another subsidiary. Separate accounts are created for each subsidiary, one with the account class *service* and the other with the account class *billing* to reflect their different functions. An account given the account class *service* generally stores service item information and allows end users to analyze the customer's usage or orders. An account given the account class *billing* generally stores information for the financial transaction or invoice.

Siebel Energy does not restrict parent-child associations by using the account class. Any class can be a child of any other class. For example, a customer account can be placed anywhere in the hierarchy, and a billing account can be the parent or the child of a service account. To enforce hierarchy rules by using the account class, you must set them up through state models. For more information about state models, see *Siebel Business Process Framework: Workflow Guide*.

By default, Siebel Energy provides the following classes for accounts:

- **Customer Class.** An account with this class represents the actual customer, person, or organization that is receiving service. A *customer account* includes basic customer information, such as the company name and headquarters address. It can receive both service and bills.

- **Service Aggregator Class.** An account with this class receives aggregate usage details for all of its subsidiary accounts. It can be anywhere in the account hierarchy. It allows you to generate and view multiple service accounts that share some specifications.

**Implementation example:** A manufacturing company has several industrial complexes, and each complex is made up of various manufacturing plants receiving electric and gas services. Each plant can have the electric and gas services set up as separate service accounts. The corporate headquarters can set up a service aggregate account for each type of manufacturing plant to track electric and gas usage for each type of manufacturing process.

- **Service Class.** An account with this class receives service, but not bills. In the account hierarchy, it is the account level at which the physical delivery of the service or product occurs. It can represent a person or organization with multiple service addresses.
- **Billing Aggregator Class.** An account with this class receives aggregate billing details for all of its subsidiary accounts. It can be anywhere in the account hierarchy. It allows you to generate and view multiple billing accounts that have some of the same specifications. It can be set up to bill the customer by using certain requests, such as creating bills for the different services and rolling those separate billing statements into a billing aggregate account. It also allows you to create and maintain billing aggregation points and to support complex discounting methods. It receives and aggregates bills.

**Implementation example:** A company has offices in different states, and each office receives services two different services: gas and electricity. Each office can have both services set up as separate billing accounts, and each office can be set up as a billing aggregate account for the services. Then the corporate headquarters can be set up as a billing aggregate for the three offices and a single payment can be made for the services.

- **Billing Class.** An account with this class is used to invoice the customer for products and services. In the account hierarchy, it is the account level at which the financial transactions for the service or product occur. It shows the collection of all charges applied to a customer in a given time frame for which the customer must submit payment.

Siebel Energy displays the following information that is based on the account class:

- The Service Account and Billing Account Explorers filter on account class.
- In the Quotes and Order Entry views, only those accounts with the appropriate account class appear in the dialog box for association.

**NOTE:** You can set up additional account classes or rename the default classes. However, when renaming, be careful to also rename the explorers because they filter accounts on class names. For information about modifying account classes, see *Siebel Applications Administration Guide*.

Figure 1 shows an example of an account hierarchy in which parent-child relationships are established along service and billing account classes.

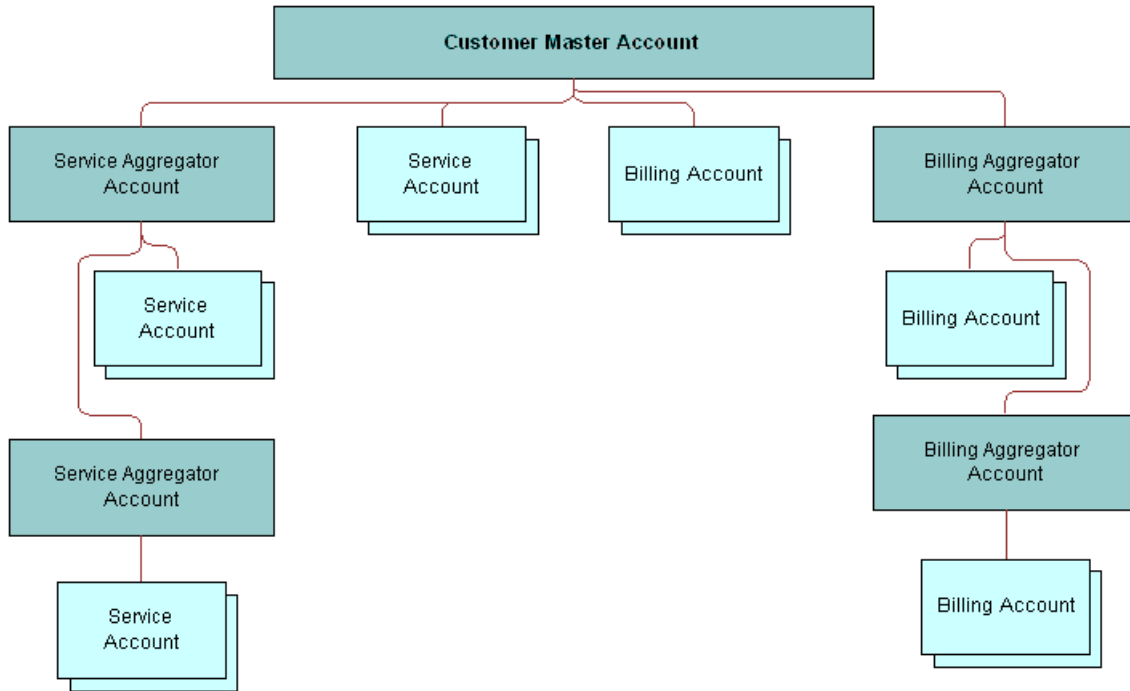


Figure 1. Example of Account Hierarchy

### Account Roles and Responsibilities

Sales administrators and sales managers usually oversee the creation and maintenance of accounts by their teams. All team members (end users) can create an account and update account information.



Table 6 lists the roles and responsibilities related to account procedures.

Table 6. Account Roles and Responsibilities

Role	Description
Administrator	<p>Sales administrator or sales manager</p> <ul style="list-style-type: none"> <li>■ Determines what information is required for an account.</li> <li>■ Determines what account information is visible to each member of the sales force.</li> <li>■ Reviews and analyzes account activity to measure performance and improve sales effectiveness.</li> <li>■ Reviews account hierarchies developed by the sales staff.</li> </ul>
End User	<p>Customer service representative</p> <ul style="list-style-type: none"> <li>■ Performs call center activities, primarily responding to customer inquiries and sales order requests.</li> <li>■ Creates accounts for new customers, including the required key information for an account.</li> <li>■ Updates accounts for existing customers.</li> <li>■ Understands relationship between accounts and associated contacts.</li> <li>■ Creates account hierarchies.</li> <li>■ Understands account hierarchies and relationship of accounts within hierarchy.</li> </ul>
	<p>Sales representative</p> <ul style="list-style-type: none"> <li>■ Focuses on outside sales and customer relationship management.</li> <li>■ Creates accounts for new customers, including the required key information for an account.</li> <li>■ Updates accounts (such as creating a sales opportunity), creates sales orders, and tracks service requests or trouble tickets.</li> <li>■ Creates account hierarchies, designating parent-child relationships among an organization's accounts.</li> </ul>

## Scenario for Using Accounts in Siebel Energy

This topic gives one example of how accounts might be used. You might use accounts differently, depending on your business model.

A customer service representative (CSR) receives a call from a prospective customer. The inbound call is arbitrarily routed to the CSR, since IVR (Interactive Voice Response) is unable to locate the account.

The caller explains that he is the owner and CEO of a small company that develops specialized software for the high-tech industry. He wants to use the CSR's company as its sole provider.

The CSR first verifies that no account currently exists for the caller and then gathers the following information about the caller's company:

- It has the following service locations:
  - The headquarters or administrative office is located in Newcastle, England.
  - A development office is based in York.
  - A sales office is located in Birmingham.
- All services for the Northern England offices (Newcastle and York) are to be billed on a single invoice. However, each location is to receive a statement.
- The Birmingham site is to receive its own invoice.
- The caller wants a discount that is based on all the services he has at all three locations, and he wants to receive a statement for all services.

Figure 2 shows the account hierarchy that the CSR creates.

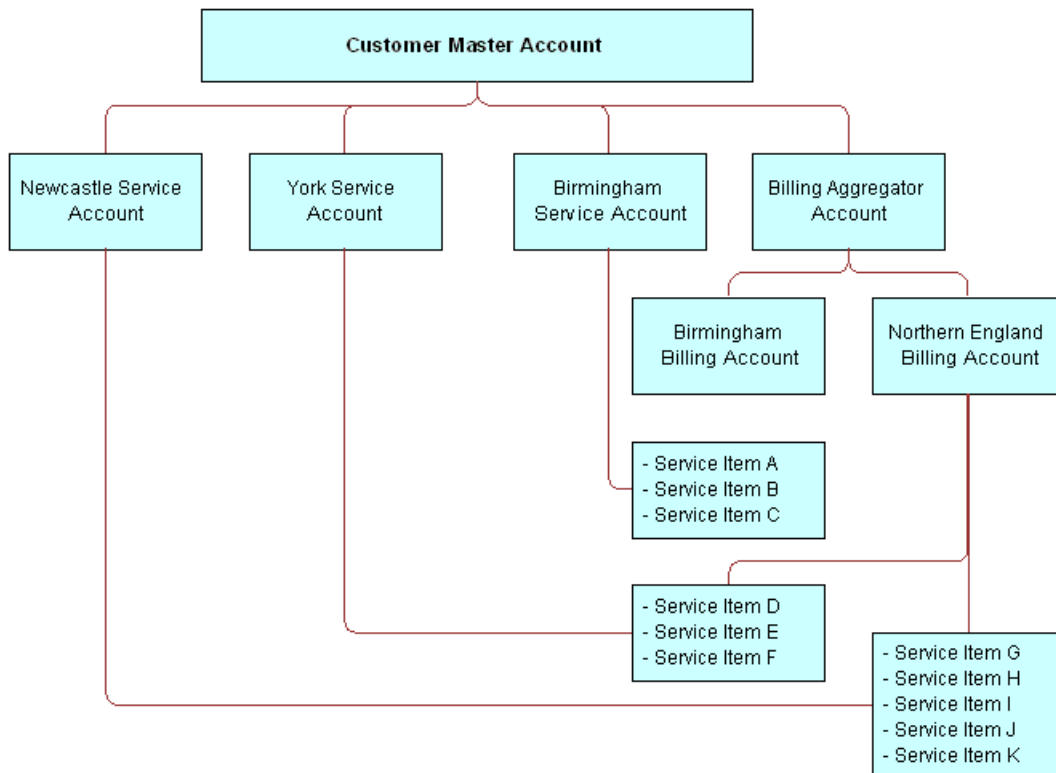


Figure 2. Account Hierarchy for Business Scenario

Using this hierarchy, the CSR must set up the following information to establish service for the caller:

- One customer account for the entire company
- Two billing accounts (one for Northern England and one for Birmingham)
- Three service accounts (one for Newcastle, one for York, and one for Birmingham)
- One billing aggregator account for both billing accounts so that a complete statement can be invoiced

Next, the CSR receives a call from a customer who has noticed that some oil is leaking from a green box in her backyard. The CSR accesses the customer's account to determine what equipment might be malfunctioning and when it was previously checked.

Figure 3 shows the sequence of procedures an end user might perform to manage accounts.

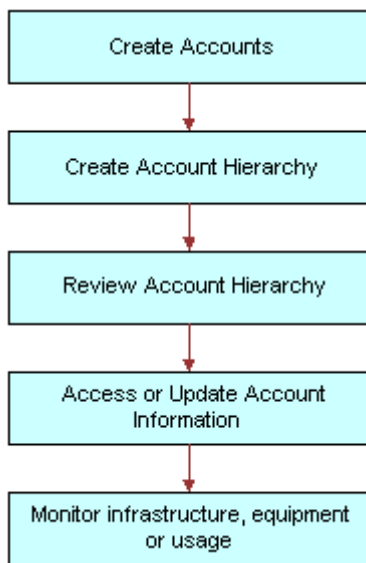


Figure 3. Example of Sequence for Accounts

## Setting Up External Organizations for Siebel Energy

Administrators must set up external organizations to create the values that can appear in external organization fields in the Siebel application. For more information about external organizations, see *Siebel Security Guide*.

External organizations appear in the dialog box that appears when an end user enters a value in an external organization field. [Table 7](#) lists some fields for external organizations.

Table 7. Examples of External Organization Fields

Screen	View	Field
Accounts	Equipment, Other Equipment	Supplier
Accounts	Infrastructure	Owner
Premises	Infrastructure	Owner
Work Orders	Work Order List	Provider

## Creating an Account in Siebel Energy (End User)

You can enter detailed information about customers in an account. After adding accounts in Siebel Energy, end users can contribute information for tracking customer service, processing requests, viewing agreements, and so on.

### Adding an Account Record

To add an account record in Siebel Energy, follow this procedure.

#### *To add an account record*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Add a record, and complete the necessary fields in the record and the More Info form. To access more fields, click the show more button in the form.

Some fields are described in the following table.

Field	Comments
Site	Type a description of the location or function of the account, such as <i>headquarters, corporate, or San Francisco</i> .
Account Team	Select the user ID of the team for the account. This field determines who can access information about the account.

Field	Comments
Account Class	<p>Select the class for the account. Account classes distinguish an account within an account hierarchy when dividing accounts into billing or service accounts. The Billing Account Explorer and Service Account Explorer views filter using this field. Also, account classes determine the accounts available for association in the Quotes and Entry views.</p> <p>Select a value of Customer in this field when you create a residential customer account. For more information about account classes, see <a href="#">“About Accounts in Siebel Energy” on page 37.</a></p>
Address	<p>Select the addresses for the account. You can also enter a new address for the account. In the Account Addresses dialog box, the Premise check box indicates when the address is a premises.</p>
Good Standing	<p>Select this check box to indicate when the account is centrally blocked and certain activities cannot be performed for it. This field is not the same as the status of the account.</p>
Synonyms	<p>Select other names for the account. This field allows you to refer to accounts (and their sites) in the way that you prefer. For example, an account named A/B Products, Inc., might have the following synonyms: AB, A/B, and AB Products.</p> <p>When you search for an account or enter an account in another part of Siebel Energy, you can use a synonym instead of the actual name.</p>
Lock Assignment	<p>Select this check box if you do not want Assignment Manager to run for the account. If you do not select this check box, then Assignment Manager can reassign the account to another team according to the account territory. For example, if you want to allow the same account manager to handle a commercial account with three different locations, then even though two of the locations are in another account manager’s territory, do not select this check box.</p>

## Adding Addresses to an Account

You can add multiple addresses to account records. These addresses are used in various ways in your Siebel application, such as specifying bill destinations in billing profiles that are associated with the account. You can designate different types of addresses, with different start and end dates for each address. For example, you can designate seasonal and temporary addresses that are valid between specific dates.

### *To add addresses to an account*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the name of the account.
- 3 Click the Addresses view tab.

- 4 For each address, add a new record, and complete the fields, as necessary.  
Some fields are described in the following table.

Field	Comments
Primary	Select this check box to indicate the address is the primary address for the account. This address record populates the visible address fields that appear in the primary account record and the account header.
Active	Select this check box to indicate that the address is active and available for selection in account records.
Type	Select the type of address. This field categorizes the address for various account management functions. Values include Bill To, Ship To, Pay To, Pay From, Legal Entity, Billing Address, Mailing Address, Seasonal, and Temporary.
Start Date	Select the start date for the address.
End Date	Select the end date for the address.  The Start Date and End Date fields are required for addresses with values of Seasonal and Temporary in the Type field. Seasonal addresses define alternate, seasonal billing addresses in the integration of Siebel Energy with Oracle Utilities Customer Care and Billing. For more information, see <a href="#">“Customer Data Mapping from Oracle Utilities Customer Care and Billing to Siebel Energy”</a> on page 27.

## Creating an Account Hierarchy in Siebel Energy (End User)

Creating an account hierarchy includes creating child accounts and associating them with a parent account. You must create the parent account before adding child accounts. For information about creating an account, see [“Creating an Account in Siebel Energy \(End User\)”](#) on page 44.

**NOTE:** For mergers or acquisitions, end users can move the entire hierarchy under a new account. Be sure to associate the new parent account at the top level. The new parent ID automatically cascades to its child accounts, reflecting the change. For more information, see [“Changing a Parent-Child Account Relationship”](#) on page 47.

### Setting Up an Account Hierarchy

To create an account hierarchy, follow this procedure.

#### *To create an account hierarchy*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Add a record for each child account, and complete the necessary fields.

- 3 In the Parent field, select the parent account.

## Changing a Parent-Child Account Relationship

To change parent and child account relationship in an account hierarchy, follow this procedure.

### *To change a parent-child account relationship*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 In the Accounts list, select the child account.
- 3 In the Parent field, select a different parent account.

# Reviewing an Account Hierarchy in Siebel Energy (End User)

End users can review the entire account hierarchy to check its structure.

## Viewing the Hierarchy for Accounts

To view the hierarchy for an account, follow this procedure.

### *To review the hierarchy for an account*

- 1 Navigate to the Accounts screen.
- 2 Complete one of the following steps:
  - To review the hierarchy for billing or service accounts, navigate to Billing Account Explorer view or the Service Account Explorer view, and then expand the subfolders in the explorer tree.

The explorer view contains only those accounts for the designated account class, including corresponding aggregator accounts.
  - To review all account hierarchies, navigate to the Account Management view, and then expand the subfolders in the explorer tree.

The explorer view displays accounts under the subfolders Accounts (shows all child accounts, regardless of class), Billing Accounts, and Service Accounts.

## Viewing an Account Hierarchy as an Organization Chart

To display an account hierarchy as an organization chart, follow this procedure.

### *To view the account hierarchy as an organization chart*

- 1 Navigate to the Accounts screen, then the Accounts List view.

- 2 Drill down on the name of the account.
- 3 Click the Account Hierarchy view tab.
- 4 Scroll down to view the organization chart showing the account hierarchy.

## Viewing Child Accounts for Parent Accounts

To display a list of child accounts for a parent account, follow this procedure.

### *To view a list of child accounts*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the name of the account.
- 3 Click the Account Hierarchy view tab.
- 4 Scroll down and select Account Org Hierarchy from the Show drop-down list.  
A list of child accounts appears.

# Accessing or Updating Account Information in Siebel Energy (End User)

Siebel Energy allows end users to access the same account information through different views. Specific views allow end users to find the information most relevant to them, according to the procedure they want to perform at that moment.

Most views allow end users to record interactions with a customer and to update the customer's information. The functionality available to end users depends on the end user access rights.

From all views, end users can access information about billing, service, quotes, agreements, contacts, and so on.

The end-user views follow:

- **Customer portal view (call center agent)**. While talking to the customer, call center agents generally need an overview of a customer's account. The customer portal view allows them to access the most commonly needed information in a compact presentation.
- **Account views (sales representative)**. Sales representatives access the same account information as call center agents, but they might do it through the Account views. Each view displays a specific piece of account information. For example, while preparing a report, a sales representative might want to review the usage details or order history for an account. The sales representative does not need the account overview information available in the customer portal because the representative is normally not talking to the customer on the telephone while reviewing information for the report.

## Accessing the Customer Portal View

To access the Customer Portal view, follow this procedure.



### *To access the Customer Portal view*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the name of the account.

The Customer Portal view appears with several lists and forms summarizing the account information.

## Accessing Account Views

To access the Accounts screen's views, follow this procedure.

### *To access the account views*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the name of the account.
- 3 Click a view tab to access specific information for that account.

## Viewing Agreements for Accounts

To display the agreements that are associated with an account, follow this procedure.

### *To view an agreement for an account*

- 1 Navigate to the Accounts screen, then the Agreement Accounts Explorer view.
- 2 In the explorer tree, expand the folder for the account.  
Subfolders appear for the selected account's agreements.
- 3 Expand the folders and select the specific agreement or subagreement to view.

# Monitoring Infrastructure, Equipment, and Usage in Siebel Energy (End User)

End users can record and monitor the infrastructure, equipment, and usage information for service customers.

**NOTE:** End users can also view the usage detail information or add energy-related infrastructure information through the Premises screen. The decision to add equipment or infrastructure information to a premises or account might depend on whether the equipment is likely to remain attached to the premises independently of the account currently receiving utility service at that premises.

## Viewing Usage Details

To display usage details, follow this procedure.

### *To view usage detail information*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the name of the account.
- 3 Click the Usage Detail view tab.

A list of services appears with usage history beneath it. The history displays period-by-period or monthly usage information about the account and service you select.

- 4 In the Usage Detail list, select the service.
- 5 In the Usage History list, select the type of usage information you want to view from the drop-down list.

All options except Usage History and Usage Information display the information in charts.

## **Adding Installed or Planned Equipment**

To add installed or planned equipment, follow this procedure.

In the Equipment list, record and view items supplied by your company, and in the Other Equipment list, record and view items supplied by other companies, including competitors and alliance partners.

You can also use these lists to record information about the equipment your customers own or plan to acquire. For instance, if your company offers discounted rates on electricity to customers who install all-electric kitchen appliances, then you might want to record information about the appliances currently installed in a large apartment building, or the future appliance needs of a developer who is building several new homes.

If you create separate service accounts for customers with multiple locations, then you can associate installed and planned equipment for a location with its corresponding service account. If you use a single account to represent a customer with multiple locations, then associate the installed and planned equipment for each of the customers' various locations with the one account for that customer.

### *To add installed or planned equipment*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the name of the account.
- 3 Click the Equipment view tab.
- 4 In the Equipment or Other Equipment list, add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Type	Select the type of service available for the equipment.

Field	Comments
Product	Select the product for the equipment. The value you select in the Type field determines the values available for selection in this field. Most of the other fields are populated automatically with data about the product you select.
Install Date	Select the date and time when the equipment was installed, or the date and time when the customer plans to purchase the equipment.

## Adding Related Infrastructure

To add related infrastructure, follow this procedure.

In the Infrastructure list, you record information or attributes for the energy-related infrastructure at the sites to which you provide services. Typical infrastructure information might include meter type, transformer size, voltage, phase, capacitors, and gas supply pressure. This information can be important at large industrial or commercial sites such as factories, warehouses, and office buildings.

If you use multiple service accounts to represent a customer with multiple locations, then associate infrastructure items at each location with its corresponding service account. If you use a single account to represent a customer with multiple locations, then associate the infrastructure items at all the customer's locations with the one account for that customer.

### To add energy-related infrastructure

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the name of the account.
- 3 Click the Infrastructure view tab.
- 4 In the Infrastructure list, add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Attribute	Select the attribute of the infrastructure item, such as Substation or Transformer. The value you select in the Service Type field determines the values available for selection in this field.
Value	Type the value of the attribute.
Owner	Select the name of the owner of the infrastructure item.



# 4

## Profiles in Siebel Energy

This chapter explains some basic concepts regarding profiles and includes procedures for creating them. It also describes the interrelationship among profiles, business functions, and back-office applications. It includes the following topics:

- ["About Profiles in Siebel Energy"](#)
- ["Scenario for Using Profiles in Siebel Energy" on page 55](#)
- ["Creating and Updating a Profile in Siebel Energy \(End User\)" on page 59](#)
- ["About Billing Profiles in Siebel Energy" on page 59](#)
- ["About Customer Profiles in Siebel Energy" on page 61](#)
- ["About Energy Exemption Profiles" on page 61](#)
- ["About Energy Statement Profiles" on page 62](#)
- ["About Financial Profiles in Siebel Energy" on page 63](#)
- ["About Fraud Profiles in Siebel Energy" on page 65](#)
- ["About Loyalty Profiles in Siebel Energy" on page 65](#)
- ["About Site Profiles in Siebel Energy" on page 66](#)
- ["Creating and Updating an Address Profile in Siebel Energy \(End User\)" on page 66](#)

### About Profiles in Siebel Energy

Administrators, such as call center administrators, sales administrators, and sales managers, benefit from reading this chapter. It shows where customer service representatives (end users) enter information for these profiles and which information might be critical for smooth integration with back-office applications. After becoming familiar with the end-user procedures, you can customize the software to fit your company's needs.

A *profile* stores information required to perform a business function. For example, a billing profile contains the information needed to invoice the customer for products and services.

## Profile Types

Table 8 describes the account profiles available within Siebel Energy.

Table 8. Account Profiles

Profile	Comments
Address Profile and MSAG Profile	Allows for validation of an address against a master street address guide (MSAG) data source or other external database. You can also use the MSAG Profile as an example for creating other profiles relevant to your company.
Billing Profile	Captures the bill run characteristics needed to invoice the customer for products and services. It is generally associated with a billing account. An account has one billing profile that can be used in multiple billing applications to produce a bill for the account.
Customer Profile	Contains information about an account when the customer is an organization rather than a residential account. Much of the profile information can be added automatically if your company imports this data into Siebel Energy from its billing software or customer information application.
Energy Exemption Profile	Provides information about the special status of a customer, such as if the customer has life support, is a senior citizen, or has a credit problem.
Energy Statement Profile	Records billing statement preferences, including number of copies, media, and contact requesting the statement, as well as energy supplier and aggregator information.
Financial Profile	Contains information used to perform a credit check on the customer.
Fraud Profile	Contains information about the fraud status of an account. It allows end users to set fraud thresholds that, when exceeded, trigger a fraud alert.
Loyalty Profile	Contains information needed to predict customer churn, estimate debt risk, and identify upsell and cross-sell opportunities. When integrated with a third-party predictive modeling package, it displays scores generated by that software.
Site Profile	Contains detailed information about an account's location.

**NOTE:** The order management module no longer uses the Service Profile view. If you used the Service Profile view in the 6.x or earlier versions of Siebel Energy, then you want to use the new MSAG Profile view instead.

## Profile Roles and Responsibilities

Table 9 lists the employees who generally perform the procedures related to profiles.

Table 9. End-User Roles and Responsibilities

Position	Description
Customer service representative	<ul style="list-style-type: none"> <li>■ Focuses on call center activities, primarily responding to customer inquiries and sales order requests.</li> <li>■ Understands account hierarchies, including the required key information for a profile.</li> <li>■ Creates profiles for new customers, modifies and adds profiles for existing customers.</li> </ul>
Sales representative	<ul style="list-style-type: none"> <li>■ Focuses on outside sales and customer relationship management.</li> <li>■ Understands account hierarchies, including the required information for profiles.</li> <li>■ Creates profiles for new customers, modifies and adds profiles for existing customers.</li> </ul>

## Scenario for Using Profiles in Siebel Energy

This topic gives one example of how profiles might be used. You might use profiles differently, depending on your business model.

For a new customer, the customer service representative (CSR) has already created an account hierarchy, added a contact for the account, and entered an address for the account. This scenario continues the [“Scenario for Using Accounts in Siebel Energy” on page 41](#).

Now, for each service account in the hierarchy, the CSR wants to validate its address against the MSAG (master street address guide) database or a similar external database.

After submitting each new address for validation, the CSR chooses the correct match from the list the database sends back. She checks to see that the validated field has been automatically updated to indicate the procedure was completed.

Next the CSR creates unique profiles associated with individual accounts. Each profile stores information necessary to perform a business function.

Starting with the top-level parent account, the CSR creates a financial profile and a statement profile as follows:

- The CSR creates a financial profile for the top-level parent account because the customer’s company has financial responsibility for all its accounts. The financial profile includes all necessary information to perform a credit check on the company.

- The CSR also creates a statement profile for the top-level account because the customer wants to receive a statement at the corporate level that summarizes all charges for products and services.

The statement profile contains information, such as the address, number of copies of the statement required, statement media type, frequency of statement, contact person, and so on. Each statement profile is given a unique identifier within the CSR's company's billing application. All the profile information is required by the billing application so that the statement can be processed.

The CSR then moves on to the billing subaccounts in the hierarchy and creates separate billing profiles for those subaccounts. Each billing profile stores information, such as the mailing address, contact, billing frequency, and debit or credit card data for that account.

She then creates statement profiles for several subaccounts so that those offices can receive informational statements for the amount of service used.

Next she creates an exemptions profile when subsidy and tax exemption information applies. For example, a charitable organization has a tax exemption status. Exemption profiles can be created for any level of the account hierarchy and are usually part of the initial account setup. They contain information that can also be passed to the billing application.

Then she creates a site profile for each service account, which specifies how many floors the site has, where equipment is located within the site, and so on.



Figure 4 shows the accounts and profiles needed for the customer’s account hierarchy in the business scenario.

**NOTE:** Siebel Energy does not restrict how end users build hierarchies. If you want to enforce certain rules, then you must set the rules up within Siebel Business Applications. This diagram shows one recommended use of profiles for specific account classes.

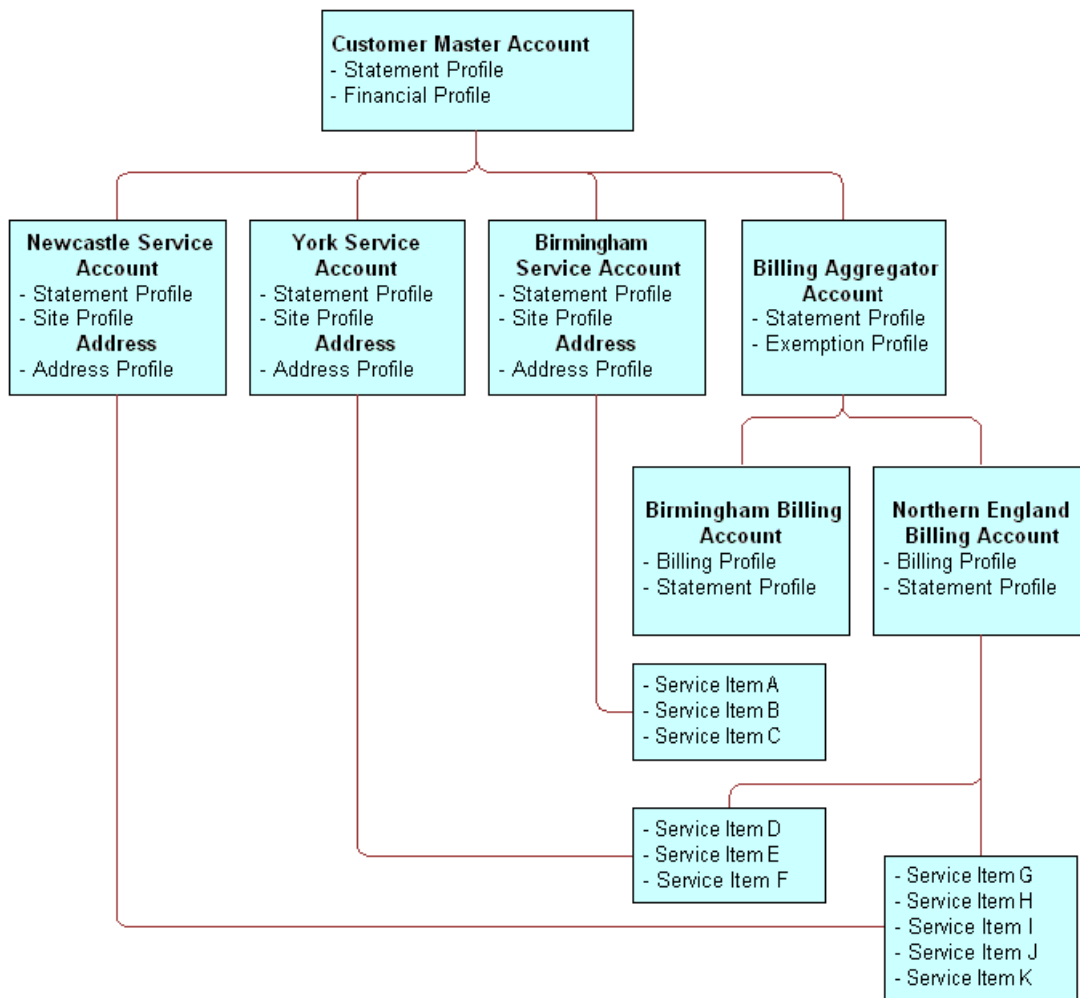


Figure 4. Account Hierarchy and Profiles for Business Scenario

Figure 5 summarizes the interrelationship among accounts, profiles, and back-office applications in the business scenario.

**NOTE:** For simple residential customer accounts (those not separated into billing and service accounts), all profiles are directly associated with the customer account and not with subaccounts as shown in Figure 5.

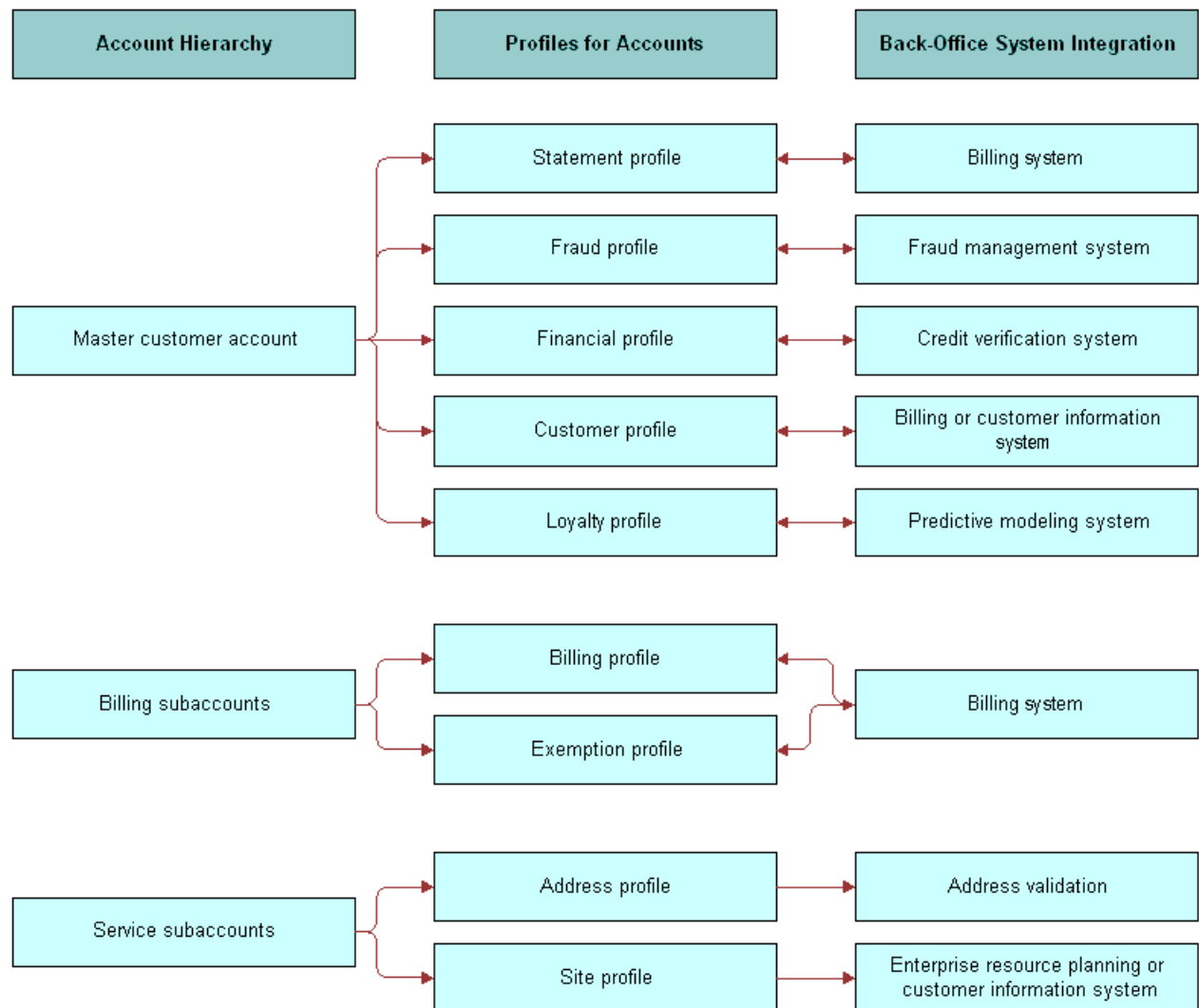


Figure 5. Interrelationships Among Accounts, Profiles, and Back-Office Applications

## Creating and Updating a Profile in Siebel Energy (End User)

At each level in the account hierarchy, end users can create one or more account profiles. However, administrators must make sure the application supports the specific type of profiles they want end users to maintain. For example, if the billing application does not support exemption plans, then an exemption profile is not necessary.

Topics in this chapter describe the various profiles you can create using the procedure in this topic and the unique fields required for each.

**NOTE:** This topic pertains to all profiles *except* Address (MSAG) Profiles. For information about working with MSAG profiles, see [“Creating and Updating an Address Profile in Siebel Energy \(End User\)”](#) on page 66.

### *To create or update a profile*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the name of the account.
- 3 Click the Profiles view tab.
- 4 In the link bar of the Profiles view, click a profile type.
- 5 In the forms or lists that appear for that specific profile, update the information.

## About Billing Profiles in Siebel Energy

End users create a *billing profile* to invoice the customer for products and services. A billing profile contains such information as billing frequency, payment type, bill media, bill type, and the customer’s email address for sending a bill electronically. This information can be submitted to a back-office application for bill processing.

A billing profile is generally associated with a billing account and can represent the legally binding agreement between the customer and the service provider. A billing profile might contain information synchronized from an external billing application.

## Creating Billing Profiles for Bill Recipients

To create a billing profile for a bill recipient, follow this procedure.

### *To create a billing profile for a bill recipient*

- 1 Follow the steps of [“Creating and Updating a Profile in Siebel Energy \(End User\)”](#) on page 59.
- 2 In the link bar of the Profiles view, click Billing Profile.

- 3 In the Billing Profile list, add a record, and complete the necessary fields.

Some fields in are described in the following table.

Field	Comments
Name	Type a name for the billing account.
Primary	Select this check box to identify the billing account and billing account address as the primary bill recipient.
Payment Method	Select the payment method. The payment method determines additional fields to update.
Contact Last Name	Select a contact to associate with the billing profile. It is not required to associate a contact with a billing profile.
Address	Select an address to associate with the billing profile. This address is generally used as the primary address to which bills are sent under the billing profile. This address is used in the integration of Siebel Energy and Oracle Utilities Customer Care and Billing. For more information, see <a href="#">"Customer Data Mapping from Oracle Utilities Customer Care and Billing to Siebel Energy"</a> on page 27.
Email Bill To	Type the email address to which the customer bill is sent electronically.
External Billing Account #	Displays the number for the external billing account. This field is populated when Siebel Energy sends a preconfigured call to the back-office application to request an account number. The account number then serves as a reference for the external application.
Budget Billing Flag	Select this check box to indicate that budget billing collection is required.

- 4 Using the value you select in the Payment Method field, add further information as follows:
  - For a Credit Card value, go to [Step 5](#).
  - For non-credit card values such as Automatic Debit, Check, or Monthly Statement, go to [Step 6](#).

- 5 Scroll down to the Credit Card Payment form, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Blocked	Displays a check in the check box to indicate that a card is blocked. This field value is determined when you run the credit card through a check using an external application.
Blocked Reason	Displays the reason for a payment card blockage. This blockage applies only to one particular payment card. If the client has several payment cards, then the client can use another card.

- 6 Scroll down to the Automatic Debit form, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Bank Routing #	Type the routing number used for direct debit from the bank branch.
Bank Name	Select the name of a bank from which automatic debits are withdrawn.
Bank Branch	Type a bank branch from which automatic debits are withdrawn.

You can enter bank information manually, or select bank records from the list maintained in the Administration - Data screen, Banks view. For more information, see [“Entering Bank Information in Siebel Energy” on page 195](#).

**NOTE:** Some utility companies might maintain a master list of verified, valid bank information in the Administration - Data screen and configure the Siebel application to constrain the lists of values in this view, thus preventing users from capturing invalid bank information. Other utility companies might maintain valid bank information in an external application and integrate the information into the Siebel application.

## About Customer Profiles in Siebel Energy

End users create a *customer profile* for accounts when the customer is an organization rather than a residential account. Much of the profile information can be added automatically if your company imports this data into Siebel Energy from its billing software or customer information application.

The customer profile allows end users to capture relevant customer information, such as financial and sales information about the customer, and to record information about the customer’s partners and competitors.

## About Energy Exemption Profiles

End users create an energy exemption profile to store information about the special status of a customer, such as if the customer has life support, is a senior citizen, or has a credit problem.

Table 10 describes some fields in the Energy Exemption Profiles form.

Table 10. Energy Exemption Profile Fields

Section	Field	Comments
LIFELINE	Eligible	Customer’s eligibility for Lifeline assistance.
	Received Date	Date when Lifeline documentation is received.
	Effective Date	Date when Lifeline assistance is effective.
	Renewal Date	Date when Lifeline renewal is required.
TAX EXEMPTION	Federal Id State Id County Id City Id	Identification numbers to show eligibility for a federal, state, county, and city exemption for tax.
	Tax Exemption Number	Number of the certificate that is issued for temporary exemption from tax.
SPECIAL CUSTOMER		Categories that apply to the customer.

## About Energy Statement Profiles

End users create a statement profile to record statement preferences, including the number of copies, the media, and the contact requesting the statement, as well as the energy supplier and aggregator information. These statements can serve a variety of purposes. End users can create multiple statement profiles for an account if the billing application supports this functionality.

### Setting Up Statement Profiles for Secondary Bill Recipients

In addition to the primary bill recipient listed in the Billing Profile, you can designate one or more contacts as secondary bill recipients for an account, by setting up a statement profile record for each recipient. If your Siebel application is integrated with Oracle Utilities Customer Care and Billing through the customer data synchronization PIP, then updates made to the statement profile records in your Siebel application are synchronized to Oracle Utilities Customer Care and Billing. For more information about PIPs, see [“About Integration of Siebel Energy with Oracle Utilities Customer Care and Billing” on page 23](#).

#### *To create a statement profile for a bill recipient*

- 1 Follow the steps of [“Creating and Updating a Profile in Siebel Energy \(End User\)” on page 59](#).
- 2 In the link bar of the Profiles view, click Statement Profile.
- 3 In the Statement Profile subview, perform one of the following steps:

- In the Statement Profile History list, add a record.
  - In the drop-down list, select Statement Profile and add a record in the form.
- 4 Complete the fields as necessary.

Some fields are described in the following table.

Field	Comments
Contact Last Name	Select the name of the statement recipient.
Address	Select the address to which the statement is sent. The contact that you select determines the street addresses that are available for selection.
Bill Type	Select the type of statement to send to the recipient. Selection options are Detail and Summary.
Email Bill To	Type the email address to which to send the statement.
Bill Media	Select the media for the statement.
Vendor	Type the organization that might issue the statement.
Language	Select the three-letter code for the language in the statement.

- 5 Repeat [Step 4](#) for each secondary bill recipient you want to associate with the account.

## Verifying Statement Profiles for Secondary Bill Recipients

To verify the statement profiles for secondary bill recipients, follow this procedure.

### *To verify the statement profiles for bill recipients*

- 1 Follow the steps of ["Creating and Updating a Profile in Siebel Energy \(End User\)"](#) on page 59.
- 2 In the link bar of the Profiles view, click Statement Profile.
- 3 In the Statement Profile History list, verify the completeness and accuracy of the bill recipient records associated with the account.

## About Financial Profiles in Siebel Energy

End users create a financial profile to perform a credit check on the customer. To verify a customer's credit, Siebel Energy submits a request to a back-office application or credit bureau. The back-office application or credit bureau sends back a response that includes a credit score that determines whether the customer is authorized by internal credit policy to subscribe to services. These back-office applications perform credit checks for incorporated businesses or individuals.

Table 11 describes some fields in the Financial Profiles form. However, different fields can appear according to the value you select in Account Type field of the account record.

Table 11. Financial Profile Fields

Section	Field	Comments
PROFILE	Contact Last Name and First Name	Contact for the account. When you create a new record, this field is automatically populated with the name of the contact in the Primary Contact field of the account record.
	Corporate Number	Business number that is provided by a state, county, or city government.
	Legal Entity	Legal name of the company or corporation.
	Tax Profile Code	Code from standard tax categories that classify companies according to their tax aspects. This information is stored in an external billing application or an external credit and tax application.
BANK	Account Name Account # Bank Name Bank Branch	Customer's bank information for a credit check.
CREDIT RATING	Rating	Credit rating of the customer.
	Source	Group that performed the most recent credit rating.
	Last Update	Date the last credit check was performed.
	Update By	User ID of the person who last requested a credit check.

## Running a Credit Check

To run a credit check, the financial profile information is sent to an external application that reports a credit rating. The credit rating is typically produced by a credit bureau and indicates the customer's ability to pay. This credit rating helps companies to assess their risk before agreeing to credit terms with a potential customer.

**NOTE:** Credit check data for an incorporated business or an individual includes business name, billing address, corporate ID, and tax ID. For an unincorporated business, credit check data includes name, social security number, and driver's license.



**To run a credit check**

- 1 Set up the financial profile.

For more information about creating a profile, see [“Creating and Updating a Profile in Siebel Energy \(End User\)” on page 59](#).

- 2 In the Financial Profile form, click Credit Check.

The financial profile information is sent to an external application that reports a credit rating.

## About Fraud Profiles in Siebel Energy

A fraud profile contains information about the fraud status of a customer account. End users can set up thresholds that, when exceeded, trigger the creation of a fraud alert.

Table 12 describes some fields in the Fraud Profiles form.

Table 12. Fraud Profile Fields

Field	Comments
Max Duration of Calls	Maximum time that is allowed for a call.
Max Number of Calls	Maximum number of calls that the customer can make in a given period.
Max Value of Calls	Cost of the calls, in the appropriate currency.
Daily Threshold	Threshold limit for the calls the customer can make in a day.
Domestic Threshold	Threshold limit for the domestic calls the customer can make.
International Threshold	Threshold limit for the international calls the customer can make.
Credit Threshold	Amount of credit the account is allowed.
Sensitive Number Threshold	Threshold limit for calls that the customer can make to sensitive numbers. Sensitive numbers might include high-priced calls, such as calls to 900 numbers.
Overflow Value	Overflow allowed for the threshold limits in the Calculator, expressed as a percentage.

## About Loyalty Profiles in Siebel Energy

The Loyalty Profile view contains scores generated by a back-office predictive modeling application. It helps predict customer churn, estimate debt risk, and identify upsell and cross-sell opportunities.

## About Site Profiles in Siebel Energy

A site profile contains detailed information about an account's location. [Table 13](#) describes some fields in the Site Profiles form. To access all fields, click the show more button in the form.

Table 13. Site Profile Fields

Field	Comments
Servicing Company	Energy service company or local distribution company that provides the energy service.
Supply Characteristics	Indicates whether the site is inside or outside your company's standard service territory.
Open Market	Indicates whether the site is either in an unregulated energy market or in a regulated market.
Cogeneration	Indicates whether the site can generate its own energy but can also purchase electricity from an energy provider.

## Creating and Updating an Address Profile in Siebel Energy (End User)

End users can enter addresses without tight restrictions on formatting. However, when provisioning services, tighter formatting restrictions might be required by a back-office application.

To guarantee proper formatting, the address needs to be validated against a back-office data source. In Siebel Business Applications, Address Profiles allow multiple formats of one address to be stored. The MSAG (master street address guide) format is available with the shipped product, but other formats can be added using Siebel Tools. When setting up additional formats, use the MSAG Profile as an example.

Obtaining the proper address format is important in performing the following key business processes:

- Validating service addresses or mailing addresses against an external standard to guarantee a unique location for finding facilities, activating services, or mailing materials through the Postal Service.
- Determining the existing services and service provider at the address.

Each address profile format requires an external data source for validation. Your company can either own the data outright or subscribe to a service that provides the data.

After validating an address, end users can change some address fields. To edit those fields, end users must revalidate the address.

### Validating an Address

To validate an address, follow this procedure.

### *To validate an address*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the name of the account.
- 3 Click the Address Profile view tab.

The Address list appears with the MSAG Profile form beneath it. The Address list shows all of the addresses associated with the account.

- 4 In the Address list, select the address you want to validate.
- 5 Scroll down to the MSAG Profile form, add a record, and complete the necessary fields.
- 6 In the Validated field, select Y.

If the address validation is integrated with an external data source, then selecting Y begins a search for possible addresses.

**NOTE:** This behavior differs from the default behavior of the shipped product, which supports manual address validation. In the manual state, selecting Y marks the MSAG Profile as validated.

- 7 In the dialog box containing addresses, select the address that matches the customer's address.  
After the address is validated, the MSAG profile becomes read-only with the exception of the Access Instruction and Descriptive Location fields. To update the profile, you must revalidate the address.

## Revalidating an Address

To revalidate an address, follow this procedure.

### *To revalidate an address*

- Follow the procedure for validating an address, but click ReValidate after [Step 4 on page 67](#) before continuing with the procedure.



# 5

## Contacts in Siebel Energy

This chapter discusses contact management and includes procedures for contact management. It includes the following topics:

- [“About Contacts in Siebel Energy” on page 69](#)
- [“Scenario for Using Contacts in Siebel Energy”](#)
- [“Creating a Contact in Siebel Energy \(End User\)” on page 70](#)
- [“Modifying a Contact Profile in Siebel Energy \(End User\)” on page 72](#)
- [“Creating a Contact-Related Activity in Siebel Energy \(End User\)” on page 72](#)
- [“Associating a Contact with a Trouble Ticket in Siebel Energy \(End User\)” on page 72](#)
- [“Additional End-User Tasks for Contact Management in Siebel Energy” on page 73](#)

### About Contacts in Siebel Energy

A *contact* is someone about whom you or your company needs to keep business or personal information. Siebel Energy helps you manage contacts and associate contact data with accounts, opportunities, trouble tickets, or service requests.

Customer service representatives and field service representatives are examples of end users who might use contact management functions.

End users can use Siebel Energy to complete the following tasks:

- Record and track business and personal contact information.
- Create and track a list of activities for a contact.
- View a contact profile.
- View information about trouble tickets and service requests that are associated with a contact.

### Scenario for Using Contacts in Siebel Energy

This topic gives one example of how contacts might be used. You might use contacts differently, depending on your business model.

A call center agent receives a call from a customer with a service problem. The agent verifies that the caller is already registered as a contact by using a query on the contact's name. The agent adds information to the customer's contact profile and provides the needed service by creating a trouble ticket without leaving the Contacts screen. The agent then logs the activity. During the call, the customer states an interest in purchasing a particular product, so the agent associates an opportunity with the contact. After the call, the agent sends a follow-up email to the customer to verify that the action was taken.

Figure 6 shows the sequence of procedures that an end user might follow to manage contacts.

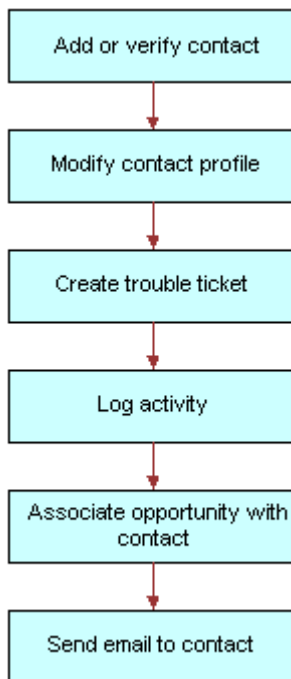


Figure 6. Example of Sequence for Contact Management

## Creating a Contact in Siebel Energy (End User)

End users must add contacts and verify that particular contacts are established customers. Their company might choose to use passwords for an additional level of verification.

End users can view all contact records that they create. If an end user adds a contact to an account or opportunity and that account or opportunity has an associated sales team, then members of the sales team can also view the contact. In a contact record, a sales team is also known as a contact access list.

## Adding a Contact Record

To add a contact record in Siebel Energy, follow this procedure. For more information about adding contacts, see *Siebel Applications Administration Guide*.

### To add a contact record

- 1 Navigate to the Contacts screen, then the Contacts List view.
- 2 Add a new record to the Contacts list, and complete the necessary fields in the record and the More Info form.
- 3 In the Account field, select one or more accounts in the dialog box.  
If multiple accounts are associated with this contact, then designate one account as the primary account by selecting the Primary field for that account.

## Adding Contact Addresses

A contact record can have multiple addresses. These addresses are used in various ways in your Siebel application, such as specifying destinations for statements with which contacts are associated. You can also designate different types of addresses, with different start and end dates, as seasonal and temporary addresses that are valid during specific periods of time.

### To add contact addresses

- 1 Navigate to the Contacts screen, then the Contacts List view.
- 2 In the Address field of the contact for which you want to add addresses, click the select button.
- 3 In the Contact Addresses dialog box, select the addresses.  
The address record with a check in the Primary field appears in the address fields for the contact.
- 4 Drill down on the name of the contact.
- 5 Click the Addresses view tab.
- 6 In the Addresses list, modify the fields of the added addresses as required.

Some fields are described in the following table.

Field	Comments
Start Date	Select the start date and time for the address.
End Date	Select the end date and time for the address.  The Start Date and End Date fields are required for addresses with values of Seasonal and Temporary in the Type field. Seasonal addresses define alternate, seasonal billing addresses in the integration of Siebel Energy with Oracle Utilities Customer Care and Billing. For more information, see <a href="#">"Customer Data Mapping from Oracle Utilities Customer Care and Billing to Siebel Energy"</a> on page 27.

Field	Comments
Active	Select this check box to designate that the address is currently valid for the contact.
Type	Select the type of address. Type values categorize the address for functional purposes.

## Modifying a Contact Profile in Siebel Energy (End User)

End users can modify a contact profile. Contact profiles are distinct from account profiles.

### *To add information to a contact profile*

- 1 Navigate to the Contacts screen, then the Contacts List view.
- 2 Drill down on the name of the contact.
- 3 Click the Profile view tab.
- 4 In the Profile form, complete the necessary fields.

## Creating a Contact-Related Activity in Siebel Energy (End User)

End users can add, modify, or delete activities for a contact.

### *To add an activity to a contact*

- 1 Navigate to the Contacts screen, then the Contacts List view.
- 2 Drill down on the name of the contact.
- 3 Click the Activities view tab.
- 4 In the Activities list, add a record, and complete the necessary fields.

## Associating a Contact with a Trouble Ticket in Siebel Energy (End User)

End users can associate a contact with a trouble ticket. A similar method can be used to associate a contact with a service request. For more information about trouble tickets, see [Chapter 15, "Service Requests and Trouble Tickets in Siebel Energy."](#)



### *To associate a contact with a trouble ticket*

- 1 Navigate to the Contacts screen, then the Contacts List view.
- 2 Drill down on the name of the contact.
- 3 Click the Trouble Tickets view tab.
- 4 In the Trouble Tickets list, add a record, and complete the necessary fields.

**NOTE:** If status value of the trouble ticket is Closed, then you cannot change some field values in this view. To change these field values, drill down on the ticket ID of the trouble ticket, and in the Trouble Ticket Detail form, change the status value of the trouble ticket to Open or Pending.

## Additional End-User Tasks for Contact Management in Siebel Energy

For information about other tasks related to contact management, see *Siebel Applications Administration Guide*.

### Contacts and Opportunities

End users can use Siebel Energy to associate an opportunity with a contact. For more information, see *Siebel Applications Administration Guide*.

### Contact Correspondence

End users can use Siebel Energy to send email to a contact. If an email application and Oracle's Siebel Office are installed, then the message content can be automatically generated. For more information, see *Siebel Applications Administration Guide*.



# 6

## Agreements and Entitlements in Siebel Energy

This chapter describes agreements and entitlements, and provides procedures for managing them. It includes the following topics:

- [“About Agreements and Entitlements in Siebel Energy”](#)
- [“Scenarios for Using Agreements and Entitlements in Siebel Energy”](#) on page 77
- [“Setting Up Templates for the Auto Document Feature of Siebel Energy”](#) on page 79
- [“Adding an Agreement in Siebel Energy \(End User\)”](#) on page 80
- [“Adding Agreement Terms and Generating Totals in Siebel Energy \(End User\)”](#) on page 81
- [“Creating and Printing an Agreement Document in Siebel Energy \(End User\)”](#) on page 82
- [“Associating an Agreement with an Order in Siebel Energy \(End User\)”](#) on page 83
- [“Associating an Agreement with a Service Item in Siebel Energy \(End User\)”](#) on page 83
- [“Revising an Agreement in Siebel Energy \(End User\)”](#) on page 84
- [“Viewing Agreement Details in the Explorer in Siebel Energy \(End User\)”](#) on page 84

### About Agreements and Entitlements in Siebel Energy

Agreements and entitlements can be used by customer service representatives, field service representatives, service managers, account managers, support renewal agents, and contract administrators. Agreement and entitlement data is stored in agreement and entitlement records that must be created, associated with other records, revised, examined, and printed.

This topic defines agreements and entitlements and discusses the relationship between them. For more information about agreements and entitlements, see *Siebel Applications Administration Guide* and *Siebel Field Service Guide*.

#### Agreements

An *agreement* is a legally binding document that defines the obligations to offer, provide, or produce specific products or services over a set period of time for a specific amount of money. A sale might require an agreement to detail and document the sale transaction.

An agreement typically includes detailed descriptions of pricing, terms, limitations, coverage, conditions, legal rights, processes, and guidelines. Agreements are often revised to reflect changes in the company, a company's product lines, or in the market.

Siebel Energy can manage complex commercial agreements and simple residential agreements. Complex agreement can have multiple levels, each with different terms, conditions, and discounts.

An agreement must be associated with one contact or at least one account. However, agreements can be associated with multiple accounts.

## Entitlements

An *entitlement* defines the level of support to which a customer is entitled. Examples of entitlements include response time metrics and service level metrics. A *metric* is a type of provision (for example, response time) combined with a value for that provision (for example, 2 hours). Entitlements are associated with customers through their service-level agreements. For more information, see [“Types of Agreements” on page 76](#).

## Agreement and Entitlement Relationships

The relationship between agreements and entitlements is as follows:

- An agreement can have one or more entitlements.
- An entitlement can have one or more metrics, accounts, contacts, or products.
- The accounts and contacts associated with agreements might be different from the accounts and contacts associated with an entitlement.

An agreement that is associated with an entitlement can specify that all contacts or products must receive support under the entitlement. This specification provides blanket contact service agreements and blanket product service agreements.

## Types of Agreements

Many different types of agreements can be created in Siebel Energy, including contracts, sales agreements, service agreements, service level agreements, master service agreements, work orders, profiles, letters of understanding, letters of intent, nondisclosure agreements, subcontractor work orders, price protections, and support renewals. Some types of agreements are defined as follows:

- A *contract* is an agreement that typically covers an ongoing relationship between a vendor and a customer. A contract states what a vendor is contractually bound to provide to a customer and what a customer is contractually bound to purchase from a vendor. This type of agreement is legally binding and might specify such things as products, services, discounts, terms, and entitlements.
- A *sales agreement* is an agreement that is typically related to a specific sale. This type of agreement specifies such things as base price, discounts, special rates, rentals or leasing, and financing.
- A *service agreement* is a type of agreement that defines a service relationship. It spells out a customer's rights to receive service, including the price, service level, support requirements, maintenance, and warranty. Service agreements have specific components that include:
  - **Service Calendars.** Specify the days and hours during which service are provided (for example, Monday to Friday and 9 to 5).
  - **Quotas.** Specify the amounts of service the customer can receive (for example, number of phone calls allowed, number of on-site visits allowed, and so forth).

- **Entitlements.** Specify the accounts, contacts, and products that are covered, as well as the metrics being used.
- A *service level agreement* (also referred to as an SLA or a *service support level*) is a type of service agreement that defines a customer's entitlements and assets. A *service level* is a quantitative measurement that is usually expressed as a percentage. For example, a service level might be the percentage of parts received on time out of those requested, the percentage of asset uptime, or the percentage of problems fixed within a required time frame. A service level agreement can also be part of a larger service agreement.

## Master Agreements and Subagreements

Small and uncomplicated transactions might need only a standard boilerplate agreement. Larger transactions might need a customized collection of boilerplate agreement sections. Sales involving multiple products and staggered delivery schedules might need agreements with customized content within the customized collection of agreement sections.

End users can create parent-child relationships among agreements. If, for example, a large commercial account requires a master agreement and one or more subagreements, then end users can designate the main agreement as a master agreement and generate its associated subagreements. The master agreement is the parent agreement for the subagreements.

Data from which to build agreements comes from the agreement library in Siebel Energy. An *agreement library* is a data repository developed by your company's sales and legal organizations. It includes information such as recommended and required text for agreement sections, answers to agreement questions, sample cover letters, and sample executive summaries.

# Scenarios for Using Agreements and Entitlements in Siebel Energy

This topic gives the following example of how agreements and entitlements might be used. You might use agreements and entitlements differently, depending on your business model. This topic includes the following scenarios:

- ["Managing Agreements for a Commercial Customer" on page 77](#)
- ["Managing Agreements for a Residential Customer" on page 78](#)

## Managing Agreements for a Commercial Customer

An account manager has been working with a commercial customer for the past two months on an opportunity to supply commercial electric service to the customer's office. Account information for the customer is already present in Siebel Energy. Over the past two months, the account manager has created and maintained the opportunity, quotes, and proposals in Siebel Energy.

After reviewing several proposals and discussing different offerings and services, the company's owner has accepted the account manager's most recent proposal and has requested a service agreement for the current quote.

First, the account manager creates an agreement record with basic information such as account name, effective date, and a general description of products and services to be covered. He next selects the appropriate terms to add to the agreement and specifies contacts for this agreement. Next, he creates an order. When the order is created, Siebel Energy associates the new service with the agreement.

The account manager then uses Siebel Energy to generate a physical service agreement. Using a predefined agreement template that the account manager selects, Siebel Energy automatically assembles sections from the agreement library and adds the information the account manager entered for the agreement record and its associated terms and contacts. Siebel Energy then places the text in a Microsoft Word document. If necessary, the account manager can manually edit the Word document to personalize it for the customer.

Finally, the account manager prints the finished service agreement for the owner's approval and signature.

Figure 7 shows the sequence of procedures that might be used to manage commercial agreements.

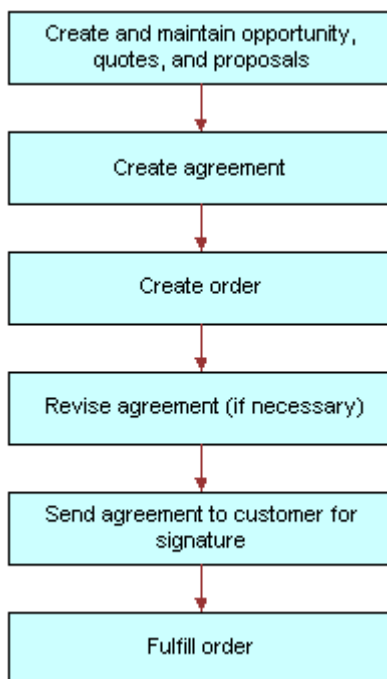


Figure 7. Example of Sequence for Agreements (Commercial)

## Managing Agreements for a Residential Customer

A residential customer with an existing service agreement decides to sign up for your company's air conditioning maintenance program. She visits her local office to complete this transaction. The agent looks up her service agreement on the local office application, which is connected to Siebel Energy at company headquarters.

The agent then creates the order in Siebel Energy. When the order is created, Siebel Energy associates the new maintenance service with the customer's agreement. When the order is complete, Siebel Energy automatically updates the agreement with the new service. Finally, Siebel Energy issues requests to the appropriate back-office applications to provision the customer's air conditioning maintenance service.

Figure 8 shows the sequence of procedures that might be used to manage residential agreements.

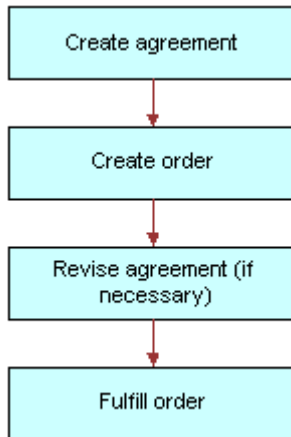


Figure 8. Example of Sequence for Agreements (Residential)

## Setting Up Templates for the Auto Document Feature of Siebel Energy

Administrators must set up agreement templates for the Auto Document feature to work properly.

### *To set up a template for the Auto Document feature*

- 1 Navigate to the Administration - Document screen, then the Proposal Field Mappings view.
- 2 In the Business Objects list, add a record for the mapping information.
- 3 In the Business Object field, select Service Agreement.
- 4 In the link bar, click Proposal Templates.

- 5 In the Templates list, add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Default	Select this check box if you want to designate this template as the default template.  <b>NOTE:</b> The Auto Document feature works only if you designate an agreement template as the default template.
Category	Select Agreement.
Mapping Name	Select the name that you created.
Template File Name	Select the template file to use.

## Verifying Templates Appear as Agreement Templates

To verify that a template appears as an agreement template, follow this procedure.

### *To verify the template appears as an agreement template*

- 1 Navigate to the Agreements screen, then the Documents view.
- 2 In the Documents list, add a record.
- 3 In the Template drop-down list, verify that the template appears as an option.

# Adding an Agreement in Siebel Energy (End User)

End users can add an agreement record to the Siebel Energy database.

### *To add an agreement*

- 1 Navigate to the Agreements screen, then the Agreement List view.
- 2 Add a record, and complete the necessary fields in the record and the More Info form. To access more fields, click the show more button in the form.

Some fields are described in the following table.

Field	Comments
Agreement #	Displays an agreement number that is automatically generated.
Name	Type the name for the agreement.



Field	Comments
Account	Select the name of the account that the agreement covers. If multiple accounts are associated with the agreement, then the primary account is visible in the form.
Valid	Select this check box to indicate that the agreement is valid. This check box is selected when entitlements are considered and when preventive maintenance actions are initiated.
Start	Select the date and time that agreement becomes effective.
End	Select the date and time that the agreement expires.
PO#	Type the purchase order number for the agreement.
Team	Select the user ID of the team working on the agreement.
Approver	Select the user ID of the member of the agreement team who is authorized to approve the agreement.
Revision	Displays the revision number of the agreement. The value is set to 1 when you create an agreement and is increased when you revise the agreement.
Service	Select this check box to indicates that the agreement is a service agreement.
Effective	Select the date and time that the agreement becomes effective. This field is for information only.
Parent	Select the parent agreement for the agreement. If the agreement is a subagreement or child agreement, then this field identifies the master or parent agreement.
Vendor	Select the name of vendor who originally sold the agreement.

## Adding Agreement Terms and Generating Totals in Siebel Energy (End User)

Agreement terms include information such as payment method, shipping charges, and credit card number. Agreement totals summarize the charges relating to the service applicable to the agreement.

### *To add terms to an agreement and generate a total*

- 1 Navigate to the Agreements screen, then the Agreement List view.
- 2 From the Show drop-down list, select All Agreements.
- 3 Drill down on the name of the agreement.

- 4 Click the Totals view tab.
- 5 In the Totals form, complete the necessary fields.

The agreement totals in the Total form are calculated automatically. The Products field and Services field amounts equal the Total Extended Price for Products and the Total Extended Price for Services, respectively. The Total field shows the total price for the shipment.

## Creating and Printing an Agreement Document in Siebel Energy (End User)

End users can prepare and print an agreement for use as a contract document.

### *To create and print an agreement document*

- 1 Navigate to the Agreements screen, then the Agreement List view.
- 2 From the Show drop-down list, select All Agreements.
- 3 Drill down on the name of the agreement.
- 4 Click the Documents view tab.
- 5 In the Documents view, complete the following steps:

- a In the Documents list, click Auto Document.

Some fields are automatically populated.

**NOTE:** If you receive an error message about a template, then check the template setup. For more information, see [“Setting Up Templates for the Auto Document Feature of Siebel Energy”](#) on page 79.

- b If necessary, complete or modify the fields.

Some fields are described in the following table.

Field	Comments
Name	Type the name of the agreement document record.
Template	Select the template on which to base the agreement.
Draft Name	Select a file for the draft of the agreement.

- c In the Documents list, click Generate Draft.

The standard agreement sections are assembled into a Microsoft Word document according to the template you select, and specific information from the current agreement record is inserted into the document. A Microsoft Word application window appears showing the draft agreement.

- d Edit and print the Word document as necessary, and then save it.

The document is automatically associated with the agreement record.

## Associating an Agreement with an Order in Siebel Energy (End User)

End users can associate agreements with orders.

### *To associate an agreement with an order*

- 1 Navigate to the Sales Orders screen, then the List view or to the Service Orders screen, then the List view.
- 2 Add a new record to the list, and complete the necessary fields.  
To access more fields, click the show more button in the form.
- 3 In the Agreement Name field, select an agreement in the dialog box, and click Submit.

## Associating an Agreement with a Service Item in Siebel Energy (End User)

End users can associate agreements with service items so that they can track detailed agreements at the item level of a product bundle.

### *To associate an agreement with a service item*

- 1 Navigate to the Quotes screen, then the List view.
- 2 Drill down on the name of the quote.
- 3 Click the Line Items view tab, and complete the following steps in the Line Items view:
  - a In the Line Items list, add a record, and complete the necessary fields for the service to order.
  - b In the Product field, select a product.  
**NOTE:** The dialog box contains only those products with the Track as Asset field selected in the Administration - Product screen, More Info view.
  - c Click Line Details in the link bar.
  - d In the Line Item Detail form, select an agreement in the Agreement Name field.
- 4 Click the Orders view tab, and complete the following steps in the Orders view:
  - a Click Sales Order or Service Order.
  - b Complete the necessary fields in the order.

- c** Drill down on the order number of the order.  
The Sales Orders screen appears.
- 5** In the Sales Orders screen, complete the following steps:
  - a** Verify that the line items from the quote appear.
  - b** In the Price List field, select a price list.
  - c** Click Submit to submit the order and change its Status field value to Open.

## Revising an Agreement in Siebel Energy (End User)

End users create a revision to an agreement to add a new clause or term, or to update information that already exists in the agreement. End users might create a revision, for example, when a customer orders a new service that is not covered by the existing agreement, or when their company modifies its discount rates.

When end users revise an agreement, Siebel Energy preserves a record of each earlier version of that agreement. Consequently, revision records allow you to track the history of any agreement. The original agreement is saved as revision 1. When an agreement is revised, the following actions occur:

- The respective revision number is increased by one.
- The agreement name in the Name field is changed to *name (.x)* where *x* is the revision number.

### *To revise an agreement*

- 1** Navigate to the Agreements screen, then the Agreement List view.
- 2** Drill down on the name of the agreement.
- 3** In the More Info form, click Revise.

## Viewing Agreement Details in the Explorer in Siebel Energy (End User)

End users can use the hierarchical format of the Agreement explorer to view agreements and examine associated information.

### *To examine agreement details in the Explorer*

- 1** Navigate to the Agreements screen, then the Explorer view.

A data document appears for each of the parent-level agreements your company has with its customers.

- 2 Expand the folder for the data document.

Subfolders appear for the selected agreement's associated agreements, entitlements, activities, notes, and products and services.

- 3 Expand the subfolder.

The individual records appear as a series of data documents below the subfolder and as rows in the list.

- 4 Select a record.

The details of the record appear highlighted in the list.



# 7

## Premises in Siebel Energy

This chapter explains the concept of a premises and describes procedures you can use to manage the creation and maintenance of premises records. It also describes typical procedures that end users might use when working with premises records. It includes the following topics:

- [“About Premises in Siebel Energy” on page 87](#)
- [“Scenario for Setting Up Premises in Siebel Energy” on page 88](#)
- [“Setting Up Premises in Siebel Energy \(End User\)” on page 90](#)
- [“Registering a Premises Hookup in Siebel Energy \(End User\)” on page 91](#)
- [“Replacing a Meter for Maintenance \(End User\)” on page 93](#)
- [“Associating an Activity with a Premises in Siebel Energy \(End User\)” on page 93](#)
- [“Verifying a Premises in Siebel Energy \(End User\)” on page 93](#)
- [“Viewing Service Point and Meter Information \(End User\)” on page 94](#)
- [“Viewing Usage History in Siebel Energy \(End User\)” on page 94](#)
- [“Viewing Service Requests for a Premises in Siebel Energy \(End User\)” on page 95](#)
- [“Adding a Service Request for a Premises in Siebel Energy \(End User\)” on page 95](#)
- [“Adding Infrastructure Information in Siebel Energy \(End User\)” on page 96](#)
- [“Viewing Asset Information for a Meter \(End User\)” on page 97](#)
- [“Additional End-User Tasks for Premises Management in Siebel Energy” on page 97](#)

### About Premises in Siebel Energy

The premises functionality of Siebel Energy is used by administrators, such as distribution network planners, field service engineers, field service operations managers, and managers of customer service representatives. It is also used by end users, such as customer service representatives.

A *premises* is an address that identifies a physical location, such as a building, apartment, land parcel, and so on, to which energy services can be delivered. In Siebel Energy, a premises acts as a grouping of service points.

A premises record stores the address of a building, apartment, or land parcel to which your company offers energy services. Siebel Energy also stores nonservice addresses that are associated with particular customers, such as billing addresses outside the company’s service territory. Nonservice account addresses have a variety of uses, but premises records are specifically used to track addresses at which a company might offer services. Premises records are never deleted and can therefore be used to track asset and service usage even if the premises becomes unoccupied.

Premises records also track service points and meters. A *service point* is an asset that is installed at a particular service location and represents a network delivery point, such as a gas pipe. For more information about setting up an asset, see *Siebel Field Service Guide*.

A *meter* is a serialized item of customer premises equipment, such as a gas, electric, and water meter, that measures service usage. Multiple meters can feed into a single service point, and service usage is accumulated and billed at the service point level.

Several procedures in this chapter involve an association between a record, such as a service point record, and a meter. It is assumed for this chapter that product and asset records for meters have already been entered into Siebel Energy. For more information about setting up a product, see *Siebel Product Administration Guide*.

Premises and meter information can be imported into Siebel Energy either periodically in batches, using Siebel Enterprise Integration Manager, or through real-time integration with a third-party application. Premises information can also be entered manually.

Every instance of a service delivered to a particular premises needs a unique identifier, called a service item identifier. Services provided through a physical network connection (for example, a gas pipe) use the Service Point as the service item identifier. For companies that prefer not to differentiate between service points and meters (companies that use only the meter entity), the Service Point acts as the meter ID.

## Scenario for Setting Up Premises in Siebel Energy

This topic gives one example of how premises setup might be used. You might use premises setup differently, depending on your business model.

A new commercial facility is under construction, and the distribution company has developed plans to connect the facility to the network. Before the facility is actually connected, the distribution network planner creates a premises record for it in Siebel Energy and attaches two electronic files to the premises record. One file is the blueprint for the connection, and the other is a technical specification document.

A week later, field service engineers complete the connection of the new facility to the network and install a meter base (service point). The field service operations manager then enters network hookup information into Siebel Energy. To track this information, the manager first creates a service point record for the installed meter base and associates it with the premises.

Because the city must inspect all newly installed meter bases, the field service operations manager adds a record for that activity and associates it with the premises. After the inspection is completed, a field service technician installs the meter.

A record for the meter, which is a serialized product with a defined Type of Meter, was previously entered into Siebel Energy. The field service operations manager next enters additional information about the meter by associating a note with the premises record. In addition, the manager associates an electronic file, which contains the hookup wiring schematic, with the premises.



A few weeks later, the occupant of the new facility moves in and calls to report that the meter is not working properly. The CSR who answers the call reviews information about the meter in Siebel Energy, including the date it was installed, its current status, and the date when it was last tested. He sees that the meter was only recently installed and has never been tested, and he records the problem by creating a service request.

In response to the creation of a service request, a field service engineer is dispatched to the facility and replaces the meter. In Siebel Energy, he records the date on which the old meter was removed and creates a record for the new meter that he installs. The new record includes the address of the premises and the service point with which the meter is associated.

Figure 9 shows the sequence of procedures that might be used to set up a commercial premises.

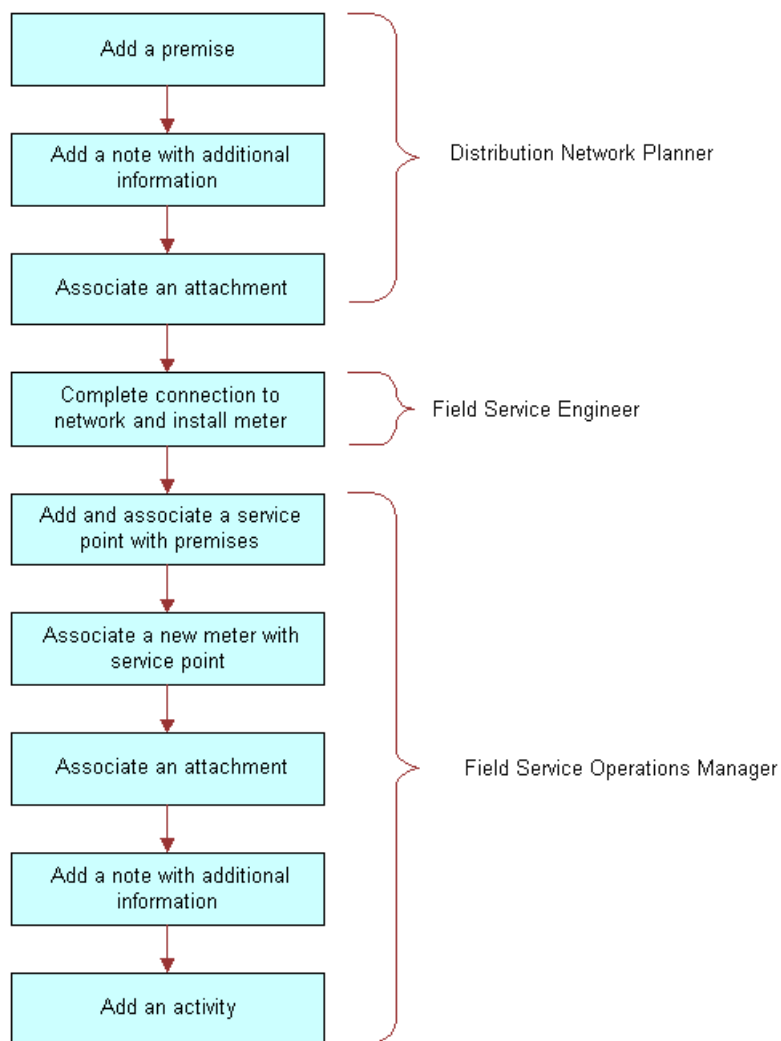


Figure 9. Example of Sequence for Initial Setup of a Commercial Premises

Figure 10 shows the sequence of procedures that might be used to maintain a commercial premises.

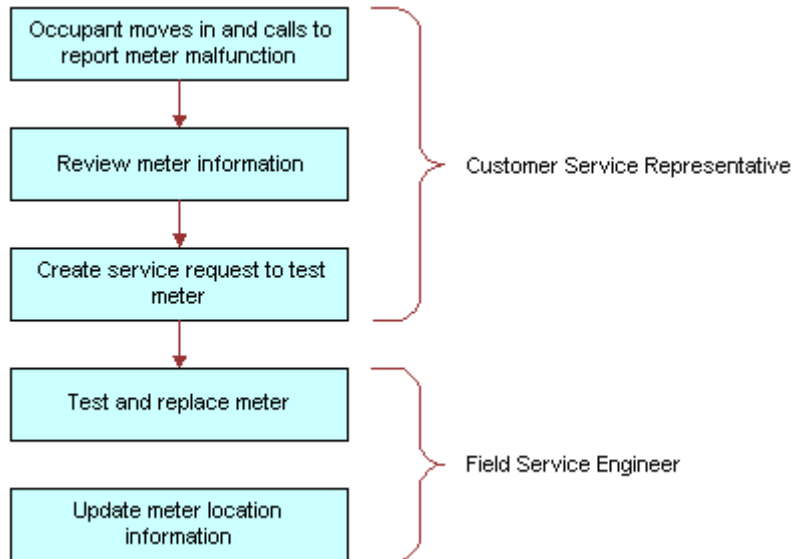


Figure 10. Example of Task Sequence for Maintenance of a Commercial Premises

## Setting Up Premises in Siebel Energy (End User)

Only administrators can set up premises records. End users can view premises information, view information associated with premises, and associate other records with premises.

### About Adding a Premises Record

There are two ways to add a premises record. The method you use depends on if an account for the customer who occupies the premises has already been established. These methods follow:

- You can add a premises record before the customer who occupies a premises is known. In this case, there is no existing customer account with which to associate the premises. When a customer moves into the premises and requests service, the association is made automatically when the premises is added to the account addresses.
- If an account for the customer who occupies a new premises is known, then a new address is added to the account addresses. After the address is validated as a premises, the address is flagged as a premises by an administrator.

Use one of the following procedures to create a premises.

### Creating a Premises Before the Account Exists

To add a premises before the customer account exists, follow this procedure.

**To add a premises before the customer account exists**

- 1 Navigate to the Administration - Data screen, then the Premises view.

The All Premises list appears with the More Info form beneath it.

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

Some fields are described in the following table.

Field	Comments
Buildings	Type the total number of buildings at the premises.
Floors	Type total number of floors at the premises.
Read Route	Type the name of the meter reading route to which the premises belongs.
Read Sequence	Type a number that identifies the sequence in which the meters at the premises are read.
Bill Group	Select the ID of the billing application batch or group to which the premises belongs.

**Creating a Premises When the Account Exists**

To add a premises when the customer account already exists, follow this procedure.

**To add a premises when the customer account already exists**

- 1 Navigate to the Administration - Data screen, then the Addresses view.

The Addresses list appears with the Address form beneath it.

- 2 In the Addresses list, select an address record.
- 3 In the Address form, select the check box for the Premise field.
- 4 In the link bar, click Premises.

The All Premises list appears with the More Info form beneath it.

- 5 In the list, select the new premises, and complete the necessary fields in the form.

For more information about some fields, see the table in [“Creating a Premises Before the Account Exists” on page 90](#).

# Registering a Premises Hookup in Siebel Energy (End User)

Premises can be associated with one or more service points. If your application is configured to allow you to manage meters separately from service points, then you can associate a meter with a premises through a service point. Otherwise, you can associate a meter point (the meter) only with a premises.

## Adding Service Points to Premises

To add a service point and associate it with a premises, follow this procedure.

### *To add a service point and associate it with a premises*

- 1 Navigate to the Administration - Data screen, then the Premises view.
- 2 In the All Premises list, select a premises record.
- 3 Click the Service Points view tab.
- 4 In the Service Points list, add a record.

The Service Points dialog box appears with a list of service points that are not associated with any premises.

- 5 In the dialog box, select an existing service point or create a new service point.
- 6 In the Service Points list, complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Removal Date	Select the date and time when the service point is removed from the premises.
Location	Type a description of the location of the service point.
Product	Select a product for the service point. Only products for which the value in the product Type field is Service Point and for which the product Service Type field is not null are available for selection.

## Associating Meters With Service Points

To associate a meter with a service point, follow this procedure.

### *To associate a meter with a service point*

- 1 Navigate to the Administration - Data screen, then the Premises view.
- 2 Click the Meter Location view tab.
- 3 In the Meter Location form, add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Meter ID	Select the ID for the meter.
Start Date	Select the date and time when the meter is associated with the service point.

## Replacing a Meter for Maintenance (End User)

A malfunctioning meter can be removed from service and replaced with one that works correctly. The original meter can then be repaired and installed at another location. When a meter is removed or installed, the field service administrator must update Siebel Energy so the locations of meters owned by the company can be tracked.

### *To record the date that a meter was removed*

- 1 Navigate to the Administration - Data screen, then the Premises view.
- 2 Click the Meter Location view tab.
- 3 In the Meter Location form, select a location record.
- 4 In the End Date field, select the date and time when the meter is removed.

## Associating an Activity with a Premises in Siebel Energy (End User)

End users can create an activity and associate it with a premises for the following reasons:

- Remind themselves of procedures related to a premises that they must perform.
- Communicate procedures related to a premises that other members of the organization must perform.

### *To associate an activity with a premises*

- 1 Navigate to the Premises screen, then the Premises List view.
- 2 Drill down on the address of the premises.
- 3 Click the Activities view tab.
- 4 In the Activities list, add a record, and complete the necessary fields.

## Verifying a Premises in Siebel Energy (End User)

End users can verify the premises that a caller is referring to by looking up the premises record.

### *To look up a premises*

- 1 Navigate to the Premises screen, then the Premises List view.

- 2 Drill down on the address of the premises.

For more information about some fields, see the table in [“Creating a Premises Before the Account Exists” on page 90.](#)

## Viewing Service Point and Meter Information (End User)

End users can view service point and meter information for the premises.

### *To view service point and meter information for a premises*

- 1 Navigate to the Premises screen, then the Premises List view.
- 2 Drill down on the address of the premises.
- 3 Click the Service Points view tab.
- 4 In the Service Points list, select a service point record.

Some fields are described in the following table.

Field	Comments
Product	Displays the name of the product at the service point.
Service Type	Displays the type of service at the service point.

- 5 Scroll down to the Meters list to view meter information.

## Viewing Usage History in Siebel Energy (End User)

Service usage is recorded at meters and accumulated for usage history and billing purposes at the service point level. End users can view usage history for a service point associated with a premises. Usage history is useful for resolving billing inquiries from customers who have recently moved into the premises. Usage history appears as data in lists and charts. End users can view usage history through either the Premises screen or the Accounts screen. For information about viewing usage history through the Accounts screen, see [Chapter 3, “Accounts in Siebel Energy.”](#)

**NOTE:** Usage data can reside in an external data repository and be viewed in Siebel Energy if that type of integration is set up.

### *To view usage history for a service point*

- 1 Navigate to the Premises screen, then the Premises List view.
- 2 Drill down on the address of the premises.

- 3 Click the Service Points view tab.
- 4 In the Service Points list, drill down on the service point of a record.
- 5 In the Service Point Services list, select a record.
- 6 In the Usage History list, select the information you want to view from the drop-down list.

## Viewing Service Requests for a Premises in Siebel Energy (End User)

End users can view service requests associated with a premises.

### *To view a service request associated with a premises*

- 1 Navigate to the Premises screen, then the Premises List view.
- 2 Drill down on the address of the premises.
- 3 Click the Service Requests view tab.  
The upper list displays accounts and the lower list displays service requests.
- 4 In the upper list, select an account.
- 5 In the lower list, select a service request.
- 6 To view more information about the service request, drill down on the service request number of the service request.

## Adding a Service Request for a Premises in Siebel Energy (End User)

End users can add a service request by creating a new service request in the Service Request view of the Premises screen.

### *To add a service request for a premises*

- 1 Navigate to the Premises screen, then the Premises List view.
- 2 Drill down on the address of the premises.
- 3 Click the Service Requests view tab.  
The upper list displays accounts and the lower list displays service requests.
- 4 In the upper list, select an account.

- In the lower list, add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
SR Number	Displays a service request number that is automatically generated.
Severity	Select a value for the severity of the service request or its impact to the customer. The severity does not have to be the same as the priority.
Priority	Select a value to prioritize the service request. This field describes the importance of the service request. The priority does not have to be the same as the severity.
Owner	Select the user ID of the person handling the service request.

## Adding Infrastructure Information in Siebel Energy (End User)

End users can create a record containing infrastructure information that is associated with a premises through an account.

### *To add infrastructure information to a premises*

- Navigate to the Premises screen, then the Premises List view.
- Drill down on the address of the premises.
- Click the Infrastructure view tab.

The upper list displays accounts and the lower list displays infrastructure.

- In the upper list, select an account.
- In the lower Infrastructure list, add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Attribute	Select the attribute of the infrastructure item, such as Substation ID or Transformer Type. The value you select in the Service Type field determines the values available for selection in this field.
Value	Type the value of the attribute. For example, if the attribute is Voltage at Meter, then a typical value is 240 volts.
Owner	Select the name of the customer or account that owns the infrastructure item.



# Viewing Asset Information for a Meter (End User)

End users can view asset information for a meter.

## *To view asset information for a meter*

- 1 Navigate to the Premises screen, then the Premises List view.
- 2 Drill down on the address of the premises.
- 3 Click the Service Points view tab.
- 4 In the Service Points list, select a service point record.
- 5 Scroll down to the Meters list, and drill down on the meter ID of the meter.

The Assets screen appears displaying information about the meter. Some fields are described in the following table.

Field	Comments
Asset #	Displays the asset number. This field is automatically generated when you create a new asset and associate it with a product.
Serial #	Displays a user-assigned number for tracking the asset.
Owner	Displays the name of the owner of the meter asset.

## Additional End-User Tasks for Premises Management in Siebel Energy

This topic contains information about other tasks related to premises.

### Caller Verification

When receiving an inbound call, end users first verify and locate the caller. For more information about verifying and locating a caller, see *Siebel Applications Administration Guide*.

### Customer Accounts

When a new customer requests service from your company, end users must create an account for the customer. For more information about creating a customer account, see [Chapter 3, "Accounts in Siebel Energy."](#)

### Sales Orders

When a customer requests a new service, end users must create a sales order. For more information about creating a sales order, see *Siebel Order Management Guide Addendum for Communications*.

## **Premises and Attachments**

At any time, end users can store additional information relating to a premises in the database by associating an electronic file with the premises record. For more information about associating an attachment with a record, see *Siebel Fundamentals*.

## **Premises and Notes**

At any time, end users can store additional information relating to a premises in the database by adding a note and associating it with the premises record. For more information about associating a note to a record, see *Siebel Fundamentals*.

# 8

## Products in Siebel Energy

This chapter describes some Siebel Energy-specific information about managing product records. It includes the following topics:

- [“About Products in Siebel Energy” on page 99](#)
- [“Setting Up Energy Products” on page 99](#)
- [“Viewing Energy Products \(End User\)” on page 100](#)

### About Products in Siebel Energy

In Siebel Energy, a *product* is an item, a service, or a group of items and services that your organization provides to utility customers. Items might include meters and electronic thermostats. A service product might be, for example, a gas service, electric service, or energy audit. Product managers can define products and product details for use by sales and service representatives. You can set up the following types of products in Siebel Energy:

- **Simple products.** These products cannot be further broken up into smaller subproducts.
- **Complex products.** These products can be broken up into subproducts.

New or modified product records can be automatically synchronized from an integrated external billing application. For more information, see [Chapter 2, “Overview of Siebel Energy.”](#) For more information about creating, structuring, and managing products in your Siebel application, see *Siebel Product Administration Guide*.

### Setting Up Energy Products

Product administrators enter information about products into the Siebel application by creating product records. A product record contains the product name and important information about the product, such as its product line name or part number. If your Siebel Energy instance is integrated with an external billing application, then product records might be synchronized from that external application. For more information about setting up products in your Siebel application, see *Siebel Product Administration Guide*. For more information about product integration with an external billing application, see [“Oracle Utilities Customer Care and Billing Product Mapping to Siebel Energy” on page 31.](#)

#### *To set up an energy product*

- 1 Navigate to the Administration - Product screen, then the Products view.
- 2 Add a new record or select an existing record, and complete or edit the necessary fields.
- 3 Click the Detail view tab, if necessary.

- 4 Scroll down to the More Details section of the Detail form, and complete or edit the necessary fields.

Some fields are described in the following table.

Field	Comments
Detailed Description	Type a detailed description of the rate structure for this product.
Pricing Details	Type a detailed description of the pricing details for this product.
Terms	Type a detailed description of the terms and conditions for this product.

**NOTE:** These fields might be populated from the integration of Siebel Energy with an external billing application. In this case, they might be used to describe the utility rate structure, detailed price, and specific terms and conditions of the products that are set up in the external billing application and not fully reproduced in Siebel Energy. These detailed descriptions might reside in the external billing application and be automatically synchronized with your Siebel application.

## Viewing Energy Products (End User)

Sales and service representatives can access product information in Siebel Energy to describe product offerings to customers and prospects prior to capturing an order, or to respond to customer inquiries. If your Siebel Energy instance is integrated with an external billing application, then product records might be synchronized from that external application. For more information about products in your Siebel application, see *Siebel Product Administration Guide*.

### *To view an energy product*

- 1 Navigate to the Products screen, then the Internal Product List view.
- 2 Drill down on the name of the product.
- 3 Click the More Info view tab.

- 4 In the More Info form, view the information fields.

Some fields are described in the following table.

Field	Comments
Detailed Description	Displays a detailed description of the rate structure for this product.
Pricing Details	Displays a detailed description of the pricing details for this product.
Terms	Displays a detailed description of the terms and conditions for this product.

**NOTE:** These fields might be populated from the integration of Siebel Energy with an external billing application. In this case, these details might reside in the external billing application and be automatically synchronized with your Siebel application.



# 9

## Assets in Siebel Energy

This chapter describes how to create, track, and manage assets in Siebel Energy. It includes the following topics:

- [“About Assets in Siebel Energy”](#)
- [“Scenario for Setting Up Assets in Siebel Energy” on page 104](#)
- [“Creating an Asset in Siebel Energy \(End User\)” on page 105](#)
- [“Associating Related Assets with a Primary Asset in Siebel Energy \(End User\)” on page 106](#)
- [“Viewing Hierarchical Information for an Asset in Siebel Energy \(End User\)” on page 106](#)
- [“Creating a Transaction for an Asset in Siebel Energy \(End User\)” on page 107](#)
- [“Viewing Components Associated with an Asset in Siebel Energy \(End User\)” on page 107](#)
- [“Adding a Service Request Associated with an Asset in Siebel Energy \(End User\)” on page 108](#)
- [“Adding a Change Request to an Asset in Siebel Energy \(End User\)” on page 108](#)
- [“Viewing Service Points and Services in Siebel Energy \(End User\)” on page 109](#)
- [“Viewing or Entering a Meter Reading in Siebel Energy \(End User\)” on page 110](#)

### About Assets in Siebel Energy

An *asset* is a product or product component that has been purchased by a customer and installed at, turned on at, or delivered to a customer site. An asset can be a physical product or a service product. Examples include meters, service points, and energy services that are active at specific customer sites. An asset is tracked at an asset number level. An asset has attributes, a configuration, and a location.

Asset data is stored in records that can be created, associated with other records, revised, examined, and printed. Asset records are used by customer service representatives (CSRs), field service representatives, service managers, account managers, support renewal agents, and contract administrators. The procedures described in this chapter are primarily used by customer service representatives. For more information about assets, see *Siebel Field Service Guide*.

Siebel Energy uses both the asset number and product name to track the asset. It is the combination of these two fields that makes an asset unique within Siebel applications. Therefore, the same asset number can be shared by different products. For example, a gas and an electric service point can have identical asset numbers for different products.

Asset management and tracking are important parts of help desk applications and field service applications. Siebel Energy tracks purchases, allows you to create an asset before purchase, and allows you to track the asset's location. The location of serialized products and product components, such as meters, is recorded, and the movement of these assets from inventory locations to customers or employees is tracked. Assets cannot be deleted, so even inactive services remain in the dialog boxes for selection.

End users can use these methods to create or modify assets in the following ways:

- Manually in the Assets screen.
- Manually in the Activity Part Tracker view, provided the product is serialized. This task is typically done by a field service agent. For more information, see *Siebel Field Service Guide*.
- Automatically using the Siebel Energy application's order management process. For more information, see *Siebel Order Management Guide Addendum for Communications*.

New or modified asset records can also be automatically received from an integrated third-party asset management application. For more information, see *Siebel Enterprise Integration Manager Administration Guide*.

## Scenario for Setting Up Assets in Siebel Energy

This topic gives one example of how asset setup might be used. You might use asset setup differently, depending on your business model.

A CSR processes an order for an energy service, which creates an asset for the root service and each component. The customer requests a backup order, for which the CSR creates an asset. The CSR associates the backup asset with the customer's service as a related asset.

At a later time, the customer calls to report a product failure. Noticing that the service has components, the CSR views their details to identify the failed component.

The CSR reviews the history of services for the asset and sees nothing out of the ordinary. The CSR creates a service request for the problem and associates it with the asset component.

A few weeks later, the customer calls again with a suggestion for improving the service. The CSR enters a change request and associates it with the customer's asset.

For another customer, the billing application shows an exception (usage data beyond the normal range). The field service representative drives out to the premises. He determines that the meter has malfunctioned and captures the meter reading in Siebel Energy.



Figure 11 summarizes the sequence an end user might use to manage asset information in Siebel Energy:

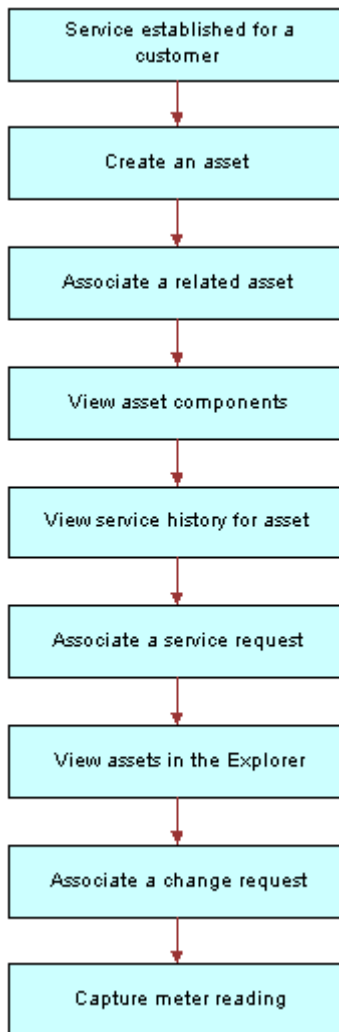


Figure 11. Example of Sequence for Assets

## Creating an Asset in Siebel Energy (End User)

End users can create assets and enter asset information in Siebel Energy.

**NOTE:** Assets can also be created through the order management module. For more information, see *Siebel Order Management Guide Addendum for Communications*.

### *To create an asset*

- 1 Navigate to the Assets screen, then the List view.
- 2 Add a record, and complete the necessary fields in the record and the More Info form. To access more fields, click the show more button in the form.

Some fields are described in the following table.

Field	Comments
Asset #	Displays an asset number that is automatically generated. This field accepts any string that includes 100 or fewer characters.
Qty	Type the quantity of the asset.
Serial #	Displays the serial number for the service point or the service ID from the order.
Account	Select the account associated with the asset.

## Associating Related Assets with a Primary Asset in Siebel Energy (End User)

End users can associate one or more assets with another asset and designate their relationships, such as backup or option. An asset with which other assets are associated is a *primary asset*.

### *To associate a related asset with a primary asset*

- 1 Navigate to the Assets screen, then the List view.
- 2 From the Show drop-down list, select All Assets.
- 3 Drill down on the asset number of the primary asset.
- 4 Click the Relationships view tab.
- 5 In the Relationships list, add a record, and complete the necessary fields.

## Viewing Hierarchical Information for an Asset in Siebel Energy (End User)

End users can view the hierarchical information for assets, including the relationships of assets and their components.

### *To view hierarchical information for an asset*

- 1 Navigate to the Assets screen, then the Assets Explorer view.
- 2 In the explorer tree, select an asset.

- Expand the asset branch to display subsidiary records.

When you click the asset name in the explorer tree, the Assets list highlights the asset selected in the explorer and displays further details on the right side of the view. The fields are the same as the fields in the Assets list in the All Assets or My Assets view.

## Creating a Transaction for an Asset in Siebel Energy (End User)

An asset transaction captures the movement of components of an asset, such as installation or part replacement. End users can create transactions for an asset.

### *To create a transaction for an asset*

- Navigate to the Assets screen, then the List view.
- From the Show drop-down list, select All Assets.
- Drill down on the asset number of the asset.
- Click the Transactions view tab.
- In the Transactions list, add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Transaction	Select the date and time of the transaction.
Asset #	Select the number of the subasset (component) associated with the transaction (for example, the part installed in the main asset).

## Viewing Components Associated with an Asset in Siebel Energy (End User)

End users can view components that are associated with an asset. Components or subassets are generally set up when the asset is created.

**NOTE:** Components are automatically added, as appropriate, when you add some transactions in the Transactions view.

### *To view components associated with an asset*

- Navigate to the Assets screen, then the List view.
- From the Show drop-down list, select All Assets.
- Drill down on the asset number of the asset.

- 4 Click the Components view tab.

The Components list displays information about the components.

## Adding a Service Request Associated with an Asset in Siebel Energy (End User)

End users can add service requests associated with an asset.

### *To add a service request associated with an asset*

- 1 Navigate to the Assets screen, then the List view.
- 2 From the Show drop-down list, select All Assets.
- 3 Drill down on the asset number of the asset.
- 4 Click the Service Requests view tab.
- 5 In the Service Requests list, add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
SR #	Displays a service request number that is automatically generated.
Last Name	Select the name of the account contact.
Owner	Select the user ID of the owners of the service request. You can select multiple owners.

## Adding a Change Request to an Asset in Siebel Energy (End User)

End users can add change requests to an asset by either creating new change requests or associating existing change requests with the asset.

### *To add a change request associated with an asset*

- 1 Navigate to the Assets screen, then the List view.
- 2 From the Show drop-down list, select All Assets.
- 3 Drill down on the asset number of the asset.
- 4 Click the Change Requests view tab.

- 5 In the Change Requests list, add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Type	Select the type of change request.
Owner	Select the user ID of the person assigned to deal with the change request.
Area	Select the general product area associated with the change request.
Subarea	Select the type of product associated with the change request.
Substatus	Displays the substatus of the change request. This field indicates whether the change request is assigned to an employee for resolution.
Priority	Select the priority for addressing the change request.

## Viewing Service Points and Services in Siebel Energy (End User)

End users can view the services associated with each service point and usage details for each service, but they cannot add a service point from this view. For information about adding a service point, see [“Registering a Premises Hookup in Siebel Energy \(End User\)”](#) on page 91.

Services are associated with service points when a CSR submits a New or Modify order for a service. When a CSR submits a Disconnect order, the service is made inactive. For more information about the employee use of order management, see *Siebel Order Management Guide Addendum for Communications*.

### *To view service point and service information*

- 1 Navigate to the Assets screen, then the List view.
- 2 From the Show drop-down list, select All Assets.
- 3 Drill down on the asset number of the asset.
- 4 Click the Service Point Services view tab.
- 5 To see various types of usage information for a service, complete the following steps:
  - a In the Service Point Services list, select the service.
  - b In the Usage History view, select an option from the drop-down list.

# Viewing or Entering a Meter Reading in Siebel Energy (End User)

End users can view the types of readings taken and can enter actual readings.

**NOTE:** Field service agents can also enter meter readings in the Activities Readings view. For more information, see *Siebel Field Service Guide*.

## Entering Meter Readings

To enter meter readings, follow this procedure.

### *To enter meter readings*

- 1 Navigate to the Assets screen, then the List view.
- 2 From the Show drop-down list, select All Assets.
- 3 Drill down on the asset number of the meter asset.
- 4 Click the Measurements view tab.

The Measurements list appears with the Measurements form beneath it.

- 5 In the form, add a record, and complete the necessary fields.

## Viewing Meter Readings

To view meter readings, follow this procedure.

### *To view meter readings*

- 1 Navigate to the Assets screen, then the List view.
- 2 From the Show drop-down list, select All Assets.
- 3 Drill down on the asset number of the meter asset.
- 4 Click the Readings view tab.
- 5 In the Readings list, select a record.

The lower Readings list displays the readings for that meter.

# 10 Opportunities in Siebel Energy

This chapter explains procedures for creating and managing opportunities in Siebel Energy. It includes the following topics:

- [“About Opportunities in Siebel Energy” on page 111](#)
- [“Scenario for Creating Opportunities in Siebel Energy”](#)
- [“Creating an Opportunity in Siebel Energy \(End User\)” on page 113](#)
- [“Associating an Account with an Opportunity in Siebel Energy \(End User\)” on page 114](#)
- [“Associating a Product with an Opportunity in Siebel Energy \(End User\)” on page 114](#)
- [“Creating a Quote for an Opportunity in Siebel Energy \(End User\)” on page 115](#)
- [“Creating a Profile for an Opportunity in Siebel Energy \(End User\)” on page 116](#)
- [“Associating a Site with an Opportunity in Siebel Energy \(End User\)” on page 117](#)
- [“Associating a Partner with an Opportunity in Siebel Energy \(End User\)” on page 117](#)
- [“Additional End-User Tasks for Opportunity Management in Siebel Energy” on page 118](#)

## About Opportunities in Siebel Energy

An opportunity is any lead that can result in a sale. Some opportunities are generated from campaign leads, while others are created by your company’s sales representatives. Through Siebel Energy, sales representatives can manage their sales opportunities for business and residential customers. Specifically, they can perform the following tasks:

- View a list of all opportunities in the database or only those opportunities specifically assigned to them.
- Create new opportunities.
- Track the status of an opportunity through the sales cycle, from creation to closure.
- Update information about opportunities as they move through the sales cycle.
- Generate quotes that are based on opportunities.
- Use opportunity profiles to record additional information and review customer responses to predefined questions.

From the Opportunities screen, CSRs can run the Price Comparison feature. The Price Comparison feature generates annual costs for both in-house and competitors’ electric and gas services. The feature calculates savings for existing and prospective customers if they choose to change rate plans. For more information, see [Chapter 12, “Price Comparison in Siebel Energy.”](#)

Administrators involved with opportunities benefit from reading this chapter. It describes how your CSRs create and update opportunities. After becoming familiar with the end-user procedures, you can customize the software to fit your company's needs.

For information about hierarchical products or multiple price types with recurring and nonrecurring fees, see the following guides:

- *Siebel Product Administration Guide*
- *Siebel Pricing Administration Guide*
- *Siebel Order Management Guide Addendum for Communications*

## Scenario for Creating Opportunities in Siebel Energy

This topic gives one example of how opportunity creation might be used. You might use opportunity creation differently, depending on your business model.

While attending a trade show, a sales representative meets the director of a small company, who expresses interest in purchasing several products from the sales representative's company. She asks the prospective customer to complete a form and assures him that she will contact him with specific product pricing.

Back at her office, the sales representative creates a new account and enters contact information in Siebel Energy. Then she creates a new opportunity and associates it with this new account.

As part of the opportunity description, she indicates the probability for the sale, estimates the potential revenue for the sale, and designates the stage of the sale.

Next she associates products with the opportunity and specifies product information, such as the product type, quantity, and pricing.

To evaluate some preliminary quotes for the prospective customer, she creates several quotes. For products containing subproducts, she selects the top-level product name to ensure proper revenue calculations. She also reviews setup fees and recurring fees for the products.

She calls the prospective customer to set up a meeting to go over her quotes. During that conversation, she determines that he might also be interested in another product that her company offers. She updates the product information and notices that the additional product triggered an overall discount generated by the rules established through Siebel Energy.

The prospective customer also mentions that his company is expanding to an additional location. The sales representative enters that location as a related site for the same opportunity.

After confirming the meeting for the next day, she hangs up and continues her preparations for the meeting. While doing so, it occurs to her that another customer might be able to take advantage of the same discount. She enters that customer account as a partner for the opportunity.



Figure 12 summarizes the sequence an end user might use with opportunities in Siebel Energy:

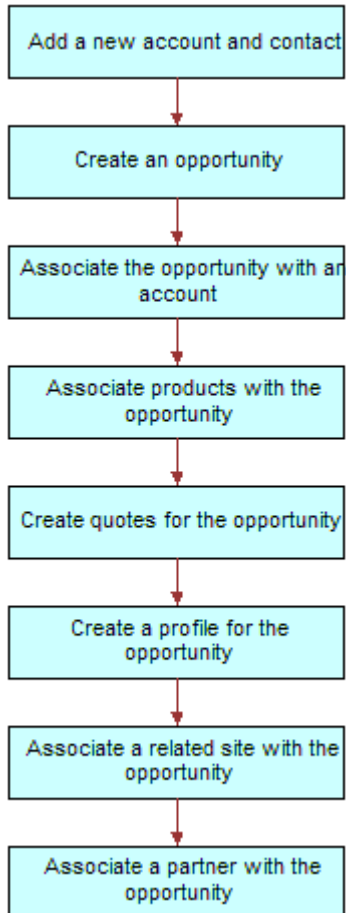


Figure 12. Example of Sequence for Opportunities

## Creating an Opportunity in Siebel Energy (End User)

An opportunity is generated in the Campaigns screen or is added manually. Every time end users identify an opportunity, they can create a new record.

### *To create an opportunity*

- 1 Navigate to the Opportunities screen, then the Opportunities List view.

- 2 Add a record, and complete the necessary fields in the record and the More Info form. To access more fields, click the show more button in the form.

Some fields are described in the following table.

Field	Comments
Revenue	Type the expected revenue for the opportunity in specific currency.
Probability %	Select the probability of completing the sale.
Sales Team	Select the user ID for the sales team of the opportunity.
Primary	Displays your use ID for the opportunity because you create the opportunity. Only managers can change this field for a sales team member.
Channel	Select the distribution strategy in your organization for the opportunity.
Expected Value	Displays the expected value for the opportunity when you populate the Probability % and Revenue fields.
Source	Select the source of the data. The Source Type field reflects the source type associated with this selection.

## Associating an Account with an Opportunity in Siebel Energy (End User)

End users can associate an opportunity with an account. This association allows them to track all important information for a customer.

### *To associate an opportunity with an account*

- 1 Navigate to the Opportunities screen, then the Opportunities List view.
- 2 In the Account field of the opportunity, select an account.

## Associating a Product with an Opportunity in Siebel Energy (End User)

End users can associate products with an opportunity and provide customers with detailed information about the products that interest them.

### *To associate a product with an opportunity*

- 1 Navigate to the Opportunities screen, then the Opportunities List view.
- 2 Drill down on the name of the opportunity.
- 3 Click the Products view tab.
- 4 In the Products list, add a record, and complete the necessary fields.

- 5 In the Product field, select a product.

## Creating a Quote for an Opportunity in Siebel Energy (End User)

End users can create a quote for an opportunity, view all quotes for an opportunity, or update an opportunity with product information taken from the Quotes view. For the updating opportunity feature to work, the following conditions must be met:

- In the Product Administration view, the number of occurrences must be greater than 0 for the product. For more information, see *Siebel Product Administration Guide*.
- In the Price List list of the Quotes screen, all products end users can associate with the opportunity or quote must be defined as Price List line items.
- In the Line Items view of the Quotes screen, the Extended Price of the quote line item must be more than 0.
- In the Quotes list of the Opportunities screen, the Price List must be selected. For more information, see [“Associating a Product with an Opportunity in Siebel Energy \(End User\)” on page 114](#).

If these conditions are not met, then Siebel Energy cannot generate revenue line items for the Opportunity. The revenue is not accurate until a quote is configured and the opportunity is updated from it.

### *To create a quote for an opportunity*

- 1 Navigate to the Opportunities screen, then the Opportunities List view.
- 2 Drill down on the name of the opportunity.
- 3 Click the Quotes view tab.
- 4 In the Quotes list, complete the following steps:
  - a Click Auto Quote.  
A new quote is created with default values in some fields.
  - b In the Price List field, select a price list, and complete the necessary fields for the new quote.
  - c Drill down on the name of the quote.  
The Quote form appears with the Line Items view beneath it.

- 5 In the Line Items list, add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Extended Net Price	Displays the extended net price. This field is calculated by multiplying the net price by the quantity.
MRC Subtotal	Displays the total monthly recurring charges for the line item.
NRC Subtotal	Displays the total nonrecurring charge for the line item.
UoM	Displays the unit of measure for the line item. This field value depends on the price type. For a one-time fee, the value is for each unit. For recurring fees, the value is for a time period, such as for each month or for each quarter.

- 6 To modify line item details, complete the following steps:

- a Click Line Details in the link bar.

**NOTE:** Administrators specify much of the product information in the Administration - Product screen. When the products are added to the quote as line items, default product information is populated for some line item fields.

- b To adjust a discount, edit the field values in the Pricing Details section of the form.

For more information about line item details, see *Siebel Order Management Guide Addendum for Communications*.

- 7 In the Quote form, click Update Opportunity.

Revenue line items are added to the opportunity for every one-time or recurring charge in every product.

## Creating a Profile for an Opportunity in Siebel Energy (End User)

End users can launch a call script that helps them define qualifying information about an opportunity. The script guides them through a series of questions to answer.

After answering the questions, end users can later analyze the information. For example, they can use charts to see which opportunities qualify as part of their target market or they can use queries to find opportunities that match specific criteria.

### *To create a profile for an opportunity*

- 1 Navigate to the Opportunities screen, then the Opportunities List view.
- 2 Drill down on the name of the opportunity.
- 3 Click the Profile view tab.

- 4 In the Profile form, click Script to launch the wizard.
- 5 Answer the questions in the script.

## Associating a Site with an Opportunity in Siebel Energy (End User)

The Opportunity Account defines the primary account related to the opportunity. End users can associate accounts for satellite offices or subsidiaries to the opportunity.

### *To associate a related site with an opportunity*

- 1 Navigate to the Opportunities screen, then the Opportunities List view.
- 2 Drill down on the name of the opportunity.
- 3 Click the Related Sites view tab.
- 4 In the Related Sites list, add a record.
- 5 In the Account field, select an account.

## Associating a Partner with an Opportunity in Siebel Energy (End User)

The Opportunity Account field defines the primary account related to the opportunity. When additional accounts are involved in an opportunity, end users add them to the opportunity as partners.

For an account to appear in the list of partners, it must have a check mark for the Partner field in its account form.

### *To associate a partner with an opportunity*

- 1 Navigate to the Opportunities screen, then the Opportunities List view.
- 2 Drill down on the name of the opportunity.
- 3 Click the Partners view tab.
- 4 In the Partners list, add a record.
- 5 In the Add Partner dialog box that appears, select an account.

The dialog box lists only accounts that have the Partner field selected in the Accounts screen, More Info view.

# Additional End-User Tasks for Opportunity Management in Siebel Energy

For more information about other tasks related to opportunities, see *Siebel Applications Administration Guide*.

## Account and Contact Creation

When adding a prospective customer to the database, end users often first create an account and enter contact information. For more information about creating a customer account, see [Chapter 3, "Accounts in Siebel Energy."](#) For more information about entering a contact, see [Chapter 5, "Contacts in Siebel Energy."](#)

# 11

## Multi-Site Quotes in Siebel Energy

This chapter describes multi-site quotes and includes procedures for creating and updating order line items that multi-site quotes generate. It also describes typical procedures that end users might perform when working with multi-site quotes. It includes the following topics:

- [“About Multi-Site Quotes in Siebel Energy” on page 119](#)
- [“Scenarios for Using Multi-Site Quotes in Siebel Energy” on page 120](#)
- [“Process of Creating New Multi-Site Quotes \(End User\)” on page 122](#)
- [“Creating New Versions of Multi-Site Quotes \(End User\)” on page 136](#)
- [“Validating Multi-Site Quotes \(End User\)” on page 137](#)
- [“Reviewing Order Line Items for Multi-Site Quotes \(End User\)” on page 138](#)
- [“Submitting Multi-Site Quotes \(End User\)” on page 139](#)
- [“Process of Creating Multi-Site Quote Revisions \(End User\)” on page 140](#)
- [“About the Requested Date Field for Multi-Site Quotes” on page 156](#)
- [“About the Service Type Field for Multi-Site Quotes” on page 158](#)
- [“About the Validation of Multi-Site Quotes” on page 159](#)
- [“About the Decomposition of Multi-Site Quotes” on page 160](#)
- [“About Data Transformation in Multi-Site Quote Revisions” on page 162](#)
- [“About Pricing for Multi-Site Quotes” on page 163](#)
- [“Workflows for Multi-Site Quotes” on page 163](#)

### About Multi-Site Quotes in Siebel Energy

Multi-site quotes apply to sites. A *site* is a location that receives services. A service account can designate a site, and a service point that is associated with a service account can designate a site. If a service account has a premises address, then you can associate a service point with it.

Employees (such as sales people, account managers, contract management specialists, order fulfillment specialists, and call center agents) and managers (such as contract supervisors, product line managers, sales managers, and customer service managers) can use multi-site quotes. End users can use the quote and order capture module to create and manage quotes and orders that have a limited number of order line items. These end users can use the multi-site ordering module to create and manage quotes and orders that have thousands of order line items.

To administer multi-site quotes, you must understand order management, product administration, and pricing administration. For more information, see *Siebel Order Management Guide*, *Siebel Product Administration Guide*, and *Siebel Pricing Administration Guide*.

For multi-site quotes, you can complete the following tasks:

- Create multi-site quotes for new services.
- Create new versions of multi-site quotes to assess alternate proposals and to optimize the priced offerings for customers.
- Decompose multi-site quotes to review the order line items for the services in the multi-site quotes.
- Submit multi-site quotes to generate and submit to the order-provisioning system the order line items for services in the multi-site quotes.
- Create multi-site quote revisions to change existing services and to add new services as required during the period of the contract with the customer.

An order-provisioning system is a set of integrated applications and other functionality. Its main component is a billing application that calculates bills and invoices customers for provided services. Additionally, an order-provisioning system can perform the following tasks:

- Manage field work to start, stop, and oversee provided services.
- Set up the collection and validation of usage measurements of provided services.
- Manage the provided services and expected energy usage in the portfolio of an energy services company to manage the company's operations for energy trading, risk management, scheduling, and settlement.

## Scenarios for Using Multi-Site Quotes in Siebel Energy

This topic gives one example of how multi-site quotes might be used. You might use multi-site quotes differently, depending on your business model. This topic includes the following scenarios:

- [“Managing Preliminary Interactions with Customers” on page 120](#)
- [“Managing Initial Multi-Site Quotes” on page 121](#)
- [“Managing Multi-Site Quote Revisions” on page 121](#)

### Managing Preliminary Interactions with Customers

An energy services company provides electricity, gas, and value-added services to residential, commercial, and industrial customers. This company has an opportunity to provide a full range of energy services to a customer in one contract. The customer has various business locations, including many fast food restaurants, food processing facilities, warehouses, garages for its fleet of vehicles, offices, and employee training centers.



The customer provides the energy services company with a list of its current business locations, and for each business location provides the service points, meter numbers, and business use for electricity and gas. The customer also provides the energy services company with its accounting locations for processing and paying utility bills. The energy services company assesses two years of energy use for the customer to characterize the energy volume and energy load-profile of the various sites. The customer also provides the energy services company with a list of its restaurants that are scheduled to open and close over the next two years and its new warehouse and its extension plans for food processing facilities.

The customer and a sales agent at the energy services company discuss the types of value-added services of interest to the customer and the supply of energy services.

## Managing Initial Multi-Site Quotes

The sales agent at the energy services company sets up a customer account for the customer with all the service accounts and service points associated with the premises addresses. He also sets up the billing accounts for the customer. Then, he enters information about site characteristics, product groups, sites, products, and billing accounts in an initial multi-site quote. He can create different versions of the initial multi-site quote to assess alternate proposals and to optimize the priced offerings for the customer.

The sales agent validates the initial multi-site quote to make sure the information in it has no errors, and then reviews the order line items for the initial multi-site quote to verify whether it generates the anticipated order line items. He might send this initial multi-site quote with its order line items to other people who are inside and outside of his organization for validation and approval. After the customer approves the initial multi-site quote, he submits it to generate and submit to the order-provisioning system the order line items for the services in the initial multi-site quote.

## Managing Multi-Site Quote Revisions

During the period of the contract with the customer, a sales agent manages the services that the energy services company provides to the customer by preparing multi-site quote revisions. She changes information in the first multi-site quote revision to accommodate the following events that affect the contract:

- The customer opens new facilities. Consequently, she adds the new sites to the multi-site quote revision.
- The customer abandons its plans to open new restaurants and other facilities, and changes the planned opening dates of other facilities. Consequently, she deactivates these sites in the multi-site quote revision, and she adds the sites with the appropriate entry dates in the following revision.
- Energy use changes at some existing facilities. Consequently, she removes the sites from the current product group by changing the exit date for the sites and then adds the sites with an entry date to a different product group in the multi-site revision.
- The customer changes the planned closing dates of some facilities. Consequently, she changes the exit date of these sites in the multi-site quote revision.

- The customer adds services to some facilities and changes the conditions for other services. Consequently, she adds the new services and changes to the configuration of the other services in the multi-site quote revision.
- The customer changes the billing accounts for some facilities. Consequently, she changes the billing account associations for these sites in the multi-site quote revision.

During the period of the contract with the customer, she creates subsequent multi-site quote revisions because of changes to the conditions of services or because of changes to the manner of providing services. She can make changes comparable to the changes that she made in the first revision. Also, she can modify the existing changes in previous revisions when those changes are not yet implemented. The process of creating subsequent revisions is the same as the process of creating the first multi-site quote revision.

## Process of Creating New Multi-Site Quotes (End User)

To create a new multi-site quote, perform the following tasks:

- 1 ["Creating Records for New Multi-Site Quotes" on page 122](#)
- 2 ["Associating Sites with New Multi-Site Quotes" on page 125](#)
- 3 ["Adding Product Groups to New Multi-Site Quotes" on page 128](#)
- 4 ["Adding Sites to Product Groups for New Multi-Site Quotes" on page 128](#)
- 5 ["Adding Products to Product Groups for New Multi-Site Quotes" on page 131](#)
- 6 ["Associating Billing Accounts with Sites for New Multi-Site Quotes" on page 134](#)

### Creating Records for New Multi-Site Quotes

You can create a record for a new multi-site quote in the following ways:

- **From the Multi-Site Quotes screen.** For more information, see ["Creating Records for New Multi-Site Quotes from the Multi-Site Quotes Screen" on page 122](#).
- **From the Accounts screen.** For more information, see ["Creating Records for New Multi-Site Quotes from the Accounts Screen" on page 124](#).
- **Using the New Version button.** For more information, see ["Creating New Versions of Multi-Site Quotes \(End User\)" on page 136](#).

This task is a step in ["Process of Creating New Multi-Site Quotes \(End User\)" on page 122](#).

### Creating Records for New Multi-Site Quotes from the Multi-Site Quotes Screen

You can create a record for a new multi-site quote from the Multi-Site Quotes screen. You can delete the record for a new multi-site quote if you have not yet submitted that new multi-site quote.

**To create a record for a new multi-site quote from the Multi-Site Quotes screen**

- 1 Navigate to the Multi-Site Quotes screen, then the List view.

Alternatively, you can navigate to the Home view of the Multi-Site Quotes screen, enter field values in the Add applet, click Add & Go to navigate to the form for the created multi-site quote, and enter values for other fields.

- 2 Add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Name	Type a name for the new multi-site quote. If you do not enter a name, then this field is automatically populated with the multi-site quote number. Before you submit the multi-site quote, you can change this field value.
Multi-Site Quote #	Displays a multi-site quote number that is automatically generated.
Revision #	Displays a value of 0 by default when you create a new multi-site quote. For more information about how this field value can change, see <a href="#">“Creating Records for Multi-Site Quote Revisions” on page 141</a> .
Version #	Displays a value of 1 by default when you create a new multi-site quote. For more information about how this field value can change, see <a href="#">“Creating New Versions of Multi-Site Quotes (End User)” on page 136</a> .
Requested Date	Displays the time of 12:00 A.M. and the date after the current date by default.  Select the date and time that you expect to submit the multi-site quote. Select a suitable date in the future to allow sufficient time for you to finalize the multi-site quote, for people inside and outside of your organization to validate and approve the quote, for the customer to review and approve the quote, and for the order-provisioning system to prepare to execute the order line items for the quote on the due dates of those order line items. Before you submit the multi-site quote, you can change this field value to a different date and time. For more information about how changing the requested date affects the multi-site quote, see <a href="#">“About the Requested Date Field for Multi-Site Quotes” on page 156</a> .
Status	Displays a value of In Progress by default.  Before you submit the multi-site quote, you can change this field value. Valid values include Rejected, Closed, Expired, Hold, Pending, Customer Approved, Won, and Lost. After you submit the multi-site quote, this field value changes to Order Placed, and you cannot change this field value.
Account	Select the account that you want to associate with the multi-site quote.
Last Name	Select a contact for the account that you want to associate with the multi-site quote, if necessary.

## Creating Records for New Multi-Site Quotes from the Accounts Screen

You can create a record for a new multi-site quote from the Accounts screen. You can delete the record for a new multi-site quote if you have not yet submitted that new multi-site quote.

### *To create a record for a new multi-site quote from the Accounts screen*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the name of the account.
- 3 Click the Multi-Site Quotes view tab.
- 4 In the Multi-Site Quotes list, add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Multi-Site Quote #	Displays a multi-site quote number that is automatically generated.
Revision #	Displays a value of 0 by default when you create a new multi-site quote. For more information about how this field value can change, see <a href="#">“Creating Records for Multi-Site Quote Revisions” on page 141.</a>
Version #	Displays a value of 1 by default when you create a new multi-site quote. For more information about how this field value can change, see <a href="#">“Creating New Versions of Multi-Site Quotes (End User)” on page 136.</a>
Name	Type a name for the new multi-site quote. If you do not enter a name, then this field is automatically populated with the multi-site quote number. Before you submit the multi-site quote, you can change this field value.
Requested Date	Displays the time of 12:00 A.M. and the date after the current date by default.  Select the date and time that you expect to submit the multi-site quote. Select a suitable date in the future to allow sufficient time for you to finalize the multi-site quote, for people inside and outside of your organization to validate and approve the quote, for the customer to review and approve the quote, and for the order-provisioning system to prepare to execute the order line items for the quote on the due dates of those order line items. Before you submit the multi-site quote, you can change this field value to a different date and time. For more information about how changing the requested date affects the multi-site quote, see <a href="#">“About the Requested Date Field for Multi-Site Quotes” on page 156.</a>

Field	Comments
Status	Displays a value of In Progress by default.  Before you submit the multi-site quote, you can change this field value. Valid values include Rejected, Closed, Expired, Hold, Pending, Customer Approved, Won, and Lost. After you submit the multi-site quote, this field value changes to Order Placed, and you cannot change this field value.
Account	Displays the account for this multi-site quote.

## Associating Sites with New Multi-Site Quotes

When you associate a site with a new multi-site quote, you can also designate the characteristics of that site. Site characteristics include information about the site, such as its energy-usage volume, energy-usage profile, square footage, and energy use process. You can use site characteristics to determine the services that you can associate with a site and the charges applicable to those services. They constitute a contractual reference for how these services are selected and the charges are established. Site characteristics can change during the period of a contract when the customer changes the site premises or its processes. Changes in site characteristics are included in multi-site quote revisions and reflect some changes in the contract.

In the preconfigured multi-site ordering module, the following fields are examples of site characteristics for which you can enter values:

- Usage (KWH), which is kilowatt hours (KWH)
- Usage Hours
- Elec. Demand (KVA), which is thousands of volt amperes (KVA)
- Load Factor

Because different companies use different definitions and formats for site characteristics, developers can configure the Site Characteristics view to include other site characteristics. In the preconfigured multi-site ordering module, you do not have to enter data in the four available fields for site characteristics, but developers can configure the Site Characteristics view so that you must enter data in specific fields.

For help with configuring the Site Characteristics view, create a service request (SR) on My Oracle Support. Alternatively, you can phone Oracle Global Customer Support directly to create a service request or get a status update on your current SR. Support phone numbers are listed on My Oracle Support.

Before you submit a new multi-site quote, you can delete a site record that you associate with it. The records in the Product Groups view and Billing Groups view for that site record are also deleted. If you change the Service Account field or Service Point field on a site record, the same fields in the records in the Product Groups view and Billing Groups view for that site record are also changed.

This task is a step in [“Process of Creating New Multi-Site Quotes \(End User\)”](#) on page 122.

**To associate sites with a new multi-site quote**

- 1 Navigate to the Multi-Site Quotes screen, then the List view.
- 2 Drill down on the name of the multi-site quote.
- 3 Click the Site Characteristics view tab.
- 4 If you want to associate a single site with the new multi-site quote, then add a record to the Site Characteristics list, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Service Account	<p>Select a service account for the site record. Only the service accounts included in the account hierarchy for the account that you select for the multi-site quote are available for selection. If you change the account for the multi-site quote, then you can select a service account from a different account hierarchy.</p> <p>You set up service accounts in the Accounts List view of the Accounts screen. Service accounts are accounts with a value in the Account Class field of Service, Service Aggregator, or Customer.</p>
Service Point	<p>Select a service point when the site applies to a service point that is associated with the service account that you select. Do not select a service point when the site applies to a service account that you have not yet selected.</p> <p>The service points that are available for selection are associated with the premises addresses for the service account that you select. For information about creating premises addresses of service accounts, see <a href="#">“Setting Up Premises in Siebel Energy (End User)” on page 90</a>. For information about associating premises addresses with service points, see <a href="#">“Registering a Premises Hookup in Siebel Energy (End User)” on page 91</a>.</p>
Service Type	<p>Displays the type of service for the service point, for example, gas or electricity. When you select a service point, this field is automatically populated. For more information, see <a href="#">“About the Service Type Field for Multi-Site Quotes” on page 158</a>.</p>
Meter Type	<p>Displays the type of meter that is associated with the service point.</p>
Usage (KWH)	<p>Type a numeric value for the energy usage in kilowatt hours (KWH) at the site.</p>
Usage Hours	<p>Type the number of hours of energy usage at the site.</p>
Meter Use	<p>Displays information about how the meter at the service point is used.</p>
Elec. Demand (KVA)	<p>Type a numeric value for the electricity demand in thousands of volt amperes (KVA) at the site.</p>
Load Factor	<p>Type a numeric value for the average electricity demand divided by the peak-electricity demand at the site.</p>

Field	Comments
Premise Address	Displays the address of the premises of the service point. When you select a service point, this field is automatically populated.
Product	Displays the product for the service point. When you select a service point, this field is automatically populated.

- 5 If you want to simultaneously associate multiple sites with the new multi-site quote, then complete either of the following steps:
  - Click Add Service Accounts, select multiple service accounts in the dialog box that appears, and click OK to close the dialog box.

In the dialog box, you can query for the records that you want to view, hold down the CTRL key and then click the A key to select all records, and hold down the CTRL key and then click each record to select individual records.

If you select service accounts that already appear in the Site Characteristics list, then those service accounts are not added to the list again.
  - Click Add Service Points, select multiple combinations of service accounts and service points in the dialog box that appears, and click OK to close the dialog box.

In the dialog box, you can query for the records that you want to view, hold down the CTRL key and then click the A key to select all records, and hold down the CTRL key and then click each record to select individual records.

If you select combinations that already appear in the Site Characteristics list, then those combinations are not added to the list again.
- 6 If necessary, complete the other fields for the added records in the Site Characteristics list.

For more information about the fields, see [Step 4](#).
- 7 If you want to delete multiple site records that you just associated with the new multi-site quote, then complete the following steps:
  - a Select the records as follows:
    - To select all records, hold down the CTRL key, and click the A key.
    - To select multiple adjacent records, click the first record, hold down the SHIFT key, and click the last record.
    - To select multiple nonadjacent records, hold down the CTRL key, and click each record.
  - b Click MultiDelete.

## Adding Product Groups to New Multi-Site Quotes

When you add product groups to a new multi-site quote, you categorize multiple service accounts and service points into groups according to the services provided at the sites and other considerations, such as the cost-to-serve these services. To facilitate the process of configuring and pricing multi-site quotes, consider defining product groups to be consistent with the site aggregates that the pricing engine uses to price quotes. For more information about pricing, see [“About Pricing for Multi-Site Quotes” on page 163](#).

Before you submit a new multi-site quote, you can delete a product group record that you add to it. The records in the Sites list and the Products list for that product group are also deleted.

This task is a step in [“Process of Creating New Multi-Site Quotes \(End User\)” on page 122](#).

### *To add a product group to a new multi-site quote*

- 1 Navigate to the Multi-Site Quotes screen, then the List view.
- 2 Drill down on the name of the multi-site quote.
- 3 Click the Product Groups view tab.
- 4 In the Product Groups list, add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
New	Displays a check for a newly added product group. Note the following points: <ul style="list-style-type: none"><li>■ For new product group records on a new multi-site quote or on a multi-site quote revision, this check box is selected.</li><li>■ For existing product group records on a multi-site quote revision, this check box is not selected.</li></ul>
Group Name	Displays the group identifier by default. You can enter a different name to identify the product group.
Group ID	Displays a group identifier that is automatically generated.
Description	Type a description for the product group.

## Adding Sites to Product Groups for New Multi-Site Quotes

You can add sites to product groups for new multi-site quotes. Before you submit a new multi-site quote, you can delete a site record that you add to a product group in it.

This task is a step in [“Process of Creating New Multi-Site Quotes \(End User\)” on page 122](#).



**To add sites to a product group for a new multi-site quote**

- 1 Navigate to the Multi-Site Quotes screen, then the List view.
- 2 Drill down on the name of the multi-site quote.
- 3 Click the Product Groups view tab, and select a record in the Product Groups list.
- 4 Click Sites in the link bar to navigate to the Sites view.
- 5 If you want to add a single site to the product group for the new multi-site quote, then add a record to the Sites list, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Site	<p>Select a site. Only the sites that are associated with the multi-site quote in the Site Characteristics view are available for selection. You can add the same site to multiple product groups.</p> <p>You cannot select a site that already exists in a site record with a value of Active in the Site Status field. However, in a multi-site quote revision, you can select a deactivated site with a value of Inactive in the Site Status field. For more information about deactivation, see <a href="#">“Deactivating Sites in Product Groups for Multi-Site Quote Revisions”</a> on page 145.</p>
Action	<p>Displays a value for the action of the site record. The field can have one of the following values:</p> <ul style="list-style-type: none"> <li>■ <b>New.</b> This value indicates that the site record is added to the product group.</li> <li>■ <b>Update.</b> This value indicates that the exit date in an existing site record of the product group is modified. This value applies only to multi-site quote revisions.</li> <li>■ <b>Deactivate.</b> This value indicates that an existing site record of the product group is deactivated. This value applies only to multi-site quote revisions.</li> </ul>
Service Account	Displays the service account for the site that you select.
Service Point	Displays the service point for the site that you select if the site applies to a service point that is associated with a service account.

Field	Comments
Entry Date	<p>Select the date and time that the site is first subject to the services that are associated with products in the product group. This field is automatically populated with requested date for the multi-site quote.</p> <p>Before you submit the multi-site quote, you can change the value in the Entry Date field to a later date and time. If you subsequently change the value in the Requested Date field to a date and time that is later than the value in the Entry Date field, then the multi-site quote becomes invalid. You are alerted about this invalidation when you validate the multi-site quote, attempt to review the order line items for the multi-site quote, or attempt to submit the multi-site quote. You must then change the value in the Entry Date field or the Requested Date field before you submit the multi-site quote.</p> <p>The entry date must be earlier than the exit date.</p>
Exit Date	<p>(Optional) Select the date and time that the site is last subject to the services that are associated with the products in the product group. This field is automatically blank. When this field is blank, the site is subject to the services that are associated with the products in the product group as long as the services are in effect.</p> <p>Before you submit the multi-site quote, you can change the value in the Exit Date field. If you subsequently change the value in the Requested Date field to a date and time that is later than the value in the Exit Date field, then the multi-site quote becomes invalid. You are alerted about this invalidation when you validate the multi-site quote, attempt to review the order line items for the multi-site quote, or attempt to submit the multi-site quote. You must then change the value in the Exit Date field or the Requested Date field before you submit the multi-site quote.</p> <p>The exit date must be later than the entry date. For more information about the exit date, see <a href="#">“Changing Exit Date of Sites in Product Groups for Multi-Site Quote Revisions”</a> on page 147.</p>
Site Status	<p>Displays a value to indicate whether the site is active or inactive. Note the following points:</p> <ul style="list-style-type: none"><li>■ For new site records, the value in this field is Active.</li><li>■ For existing site records on a multi-site quote revision, the value in this field is Inactive for the site records that are deactivated in earlier multi-site quote revisions and Active for the site records that are not deactivated in earlier multi-site quote revisions. For more information about deactivation, see <a href="#">“Deactivating Sites in Product Groups for Multi-Site Quote Revisions”</a> on page 145.</li></ul>

Field	Comments
Service Type	Displays the type of service for the service point, for example, gas or electricity. When you select a site with a service point, this field is automatically populated. For more information, see <a href="#">“About the Service Type Field for Multi-Site Quotes” on page 158</a> .
Premise Address	Displays the address of the premises of the service point. When you select a site with a service point, this field is automatically populated.

- 6 If you want to simultaneously add multiple sites to the product group for the new multi-site quote, then complete the following steps:
  - a Click Add Multiple Sites, select multiple sites in the dialog box that appears, and click OK to close the dialog box.

In the dialog box, you can query for the records you want to view, hold down the CTRL key and then click the A key to select all records, and hold down the CTRL key and then click each record to select individual records.
  - b Complete the other fields for the added records in the Sites list.

For more information about the fields, see [Step 5](#).
- 7 If you want to delete multiple site records that you just added to the product group, then complete the following steps:
  - a Select the records as follows:
    - ❑ To select all records, hold down the CTRL key, and click the A key.
    - ❑ To select multiple adjacent records, click the first record, hold down the SHIFT key, and click the last record.
    - ❑ To select multiple nonadjacent records, hold down the CTRL key, and click each record.
  - b Click MultiDelete.

## Adding Products to Product Groups for New Multi-Site Quotes

You can add products to product groups for new multi-site quotes. Before you submit a new multi-site quote, you can delete a product record that you add to a product group in it.

This task is a step in [“Process of Creating New Multi-Site Quotes \(End User\)” on page 122](#).

### *To add a product to a product group for a new multi-site quote*

- 1 Navigate to the Multi-Site Quotes screen, then the List view.
- 2 Drill down on the name of the multi-site quote.
- 3 Click the Product Groups view tab, and select a record in the Product Groups list.

- 4 Click Products in the link bar to navigate to the Products view.
- 5 In the Products list, add a record, and complete the necessary fields.

Some fields are described the following table.

Field	Comments
Line #	Displays a line number that is automatically generated for the product.
Product	<p>Select the product that is associated with the service. Before you submit the multi-site quote, you can change this field value for only new product records. This field is read-only for a submitted multi-site quote.</p> <p>You can select the same product for multiple product groups. You can also select a product that already exists in the Products list because duplicate records are allowed in the Products list.</p>
Action	<p>Displays a value for the action of the product record. The field can have one of the following values:</p> <ul style="list-style-type: none"> <li>■ <b>Add.</b> This value indicates that a product record is added to the product group.</li> <li>■ <b>Update.</b> This value indicates that the configuration of an existing product record in the product group is modified. This value applies only to multi-site quote revisions.</li> <li>■ <b>Delete.</b> This value indicates that an existing product record in the product group is retired. This value applies only to multi-site quote revisions.</li> </ul>
Inclusion Date	<p>Displays the date and time that the product record is associated with the product group. This field is read-only. Note the following points:</p> <ul style="list-style-type: none"> <li>■ For new product records, this field is blank.</li> <li>■ For existing product records on a multi-site quote revision, the value in this field is the same as the value in the Effective Date field for the corresponding product records in the source multi-site quote in which the product records were originally added. These corresponding product records have a value of Add in the Action field. For more information about changing the value in this field, see <a href="#">"Changing the Inclusion Dates of Products for Multi-Site Quote Revisions"</a> on page 153.</li> </ul>

Field	Comments
Retirement Date	<p>Displays the date and time the product record is retired from the product group. Note the following points:</p> <ul style="list-style-type: none"> <li>■ For new product records, this field is blank.</li> <li>■ For existing product records on a multi-site quote revision, the value in this field is the same as the value in the Effective Date field for the corresponding product records in the source multi-site quote in which the product records were originally retired. These corresponding product records have a value of Delete in the Action field. For more information about changing the value in this field, see <a href="#">“Changing the Retirement Dates of Products for Multi-Site Quote Revisions” on page 152.</a></li> </ul>
Effective Date	<p>Select the effective date and time that the product record is associated with the product group. This field is automatically populated with the requested date for the multi-site quote, but you can change this value to a later date and time. Note the following points:</p> <ul style="list-style-type: none"> <li>■ For new product records, the value in this field is the date and time of that the service associated with the product is effective.</li> <li>■ For existing product records on a multi-site quote revision, the value in this field is blank until you select a value when you configure or retire the product. For more information, see <a href="#">“Changing Configurations of Existing Products for Multi-Site Revisions” on page 149</a> and <a href="#">“Retiring Existing Products from Product Groups for Multi-Site Quote Revisions” on page 151.</a></li> </ul> <p>Before you submit the multi-site quote, you can change the value in the Effective Date field to a later date and time. If you subsequently change the value in the Requested Date field to a date and time that is later than the value in the Effective Date field, then the multi-site quote becomes invalid. You are alerted about this invalidation when you validate the multi-site quote, attempt to review the order line items for the multi-site quote, or attempt to submit the multi-site quote. You must then change the value in the Effective Date field or the Requested Date field before you submit the multi-site quote.</p>

- 6 If necessary, configure the product by completing the following steps:
  - a Select the effective date of the configuration in the Effective Date field.
 

The effective date of the configuration must be the same as or later than the requested date for the multi-site quote.
  - b Click Customize to open Siebel Configurator and start a configuration session for the product record.
 

**NOTE:** The Customize button is enabled only for the products that you can configure. The customize feature is available only if you licensed Siebel Configurator.

- c** Configure the product, and add, remove, and configure its components as necessary.  
You use Siebel Configurator in the same way that you use it when you configure the products for any quote or order in Siebel Business Applications. For more information, see *Siebel Order Management Guide*.
- d** Close the configuration session.  
If you configure the product, the Product Attributes list includes information about the configuration.

## Associating Billing Accounts with Sites for New Multi-Site Quotes

A *billing group* is a collection of sites that is associated with a common billing account. Billing accounts designate the address to which to send bills for provided services, and the primary billing profiles that are associated with billing accounts store information about customer payment methods. When you submit a multi-site quote, the order line items for the multi-site quote include the billing accounts.

This task is a step in [“Process of Creating New Multi-Site Quotes \(End User\)”](#) on page 122.

### *To associate a billing account with sites for a new multi-site quote*

- 1** Navigate to the Multi-Site Quotes screen, then the List view.
- 2** Drill down on the name of the multi-site quote.
- 3** Click the Billing Groups view tab.

In the Billing Groups list, all of the site records in the Site Characteristics view appear.

- 4 If you want to associate a billing account with a single site, then select a record in the Billing Groups list, and complete the billing account field.

Some fields are described in the following table.

Field	Comments
Action	<p>Displays a value for the action of the record for the billing account association. The field can be blank or have one of the following values:</p> <ul style="list-style-type: none"> <li>■ <b>New.</b> This value indicates a new billing account association.</li> <li>■ <b>Transfer.</b> This value indicates a modified billing account association. This value applies only to multi-site revisions.</li> </ul>
Billing Account	<p>Select a billing account for the site record. Only the billing accounts included in the account hierarchy for the account you select for the multi-site quote are available for selection. If you change the account for the multi-site quote, then you can select a billing account from a different account hierarchy.</p> <p>If you do not select a billing account for each site record in the Product Groups view, then the multi-site quote becomes invalid. You are alerted about this invalidation when you validate the multi-site quote, attempt to review the order line items for the multi-site quote, or attempt to submit the multi-site quote. You must then select a billing account for all site records in the Product Groups view before you submit the multi-site quote.</p> <p>You set up billing accounts in the Accounts List view of the Accounts screen. Billing accounts are accounts with a value in the Account Class field of Billing, Billing Aggregator, or Customer.</p>
Service Account	<p>Displays the service account for the site record. This field is automatically populated from the site record in the Site Characteristics view.</p>
Service Point	<p>Displays the service point if the site applies to a service point that is associated with a service account. This field is automatically populated from the site record in the Site Characteristics view.</p>
Billing Transfer Date	<p>Displays the date and time that you associate the site record with a different billing account. This field applies only to multi-site revisions. For more information, see <a href="#">“Changing the Billing Account Associations with Sites for Multi-Site Quote Revisions”</a> on page 154.</p>
Service Type	<p>Displays the type of service for the service point, for example, gas or electricity. This field is automatically populated from the site record in the Site Characteristics view. For more information, see <a href="#">“About the Service Type Field for Multi-Site Quotes”</a> on page 158.</p>

Field	Comments
Premise Address	Displays the address of the premises of the service point. This field is automatically populated from the site record in the Site Characteristics view.
Product	Displays the product for the service point. This field is automatically populated from the site record in the Site Characteristics view.

- 5 If you want to associate a billing account with multiple sites, then complete the following steps:
  - a Select multiple records in the Billing Groups list.

You can query for the records you want to view, hold down the CTRL key and then click the A key to select all records, and hold down the CTRL key and then click each record to select individual records.
  - b Click Assign Billing Account, select a billing account in the dialog box that appears, and click Assign to close the dialog box.

## Creating New Versions of Multi-Site Quotes (End User)

You can create a new version of a new multi-site quote or a multi-site quote revision by duplicating the source multi-site quote. The new version inherits all the field data for site characteristics, product groups, and billing groups in the source multi-site quote, including the data in the Action fields. Creating a new version of a source multi-site quote saves you time because you do not have to re-enter all of the field data in the new version. The source multi-site quote is not deleted.

You can create a new version of a source multi-site quote that is incomplete. Then, you can change information or add new information in the new version.

You might create new versions of multi-site quotes in the following situations:

- You create different versions of multi-site quotes while you work to optimize the priced offering for the customer. For each version, you can adjust the multi-site quote by configuring products differently or by changing some contract parameters. Then you can run your external pricing engine to reprice the quote.
- You create multiple multi-site quote versions to present different contract options to the customer. Then, the customer can choose the most suitable option. You can also keep a history of the multi-site quote versions that you prepare for the customer or that the customer reviews.
- You create various templates for new multi-site quotes. Each template contains the product groups that include the products that are associated with the services applicable to the most common customer situations or most frequent business cases. You can create a new version of a template for a new multi-site quote, and enter data specific to the customer.

You cannot create a new version of a multi-site quote that has a requested date that is the same as or earlier than the current date. If you want to create a new version of such a multi-site quote, then change the requested date of the source multi-site quote before you create the new version.



**To create a new version of a multi-site quote**

- 1 Navigate to the Multi-Site Quotes screen, then the List view.
- 2 Drill down on the name of the multi-site quote.
- 3 Click New Version.

A multi-site quote is created in the list of multi-site quotes. The number, version number, and revision number of the created multi-site quote are determined as follows:

- If you click New Version for a new multi-site quote (a multi-site quote with a version number of 1 and a revision number of 0), then the following occurs:
    - The multi-site quote number of the created multi-site quote is unique and different from the multi-site quote number of the source multi-site quote because the created multi-site quote is a new multi-site quote. When you submit the created multi-site quote, it reflects an original contract with the customer.
    - The revision number of the created multi-site quote is 0 because it is a new multi-site quote.
    - The version number of the created multi-site quote is 1 because it is the first version of a new multi-site quote.
  - If you click New Version for a multi-site quote revision (a multi-site quote with a revision number that is greater than 0), then the following occurs:
    - The multi-site quote number of the created multi-site quote is the same as the multi-site quote number of the source multi-site quote because the created multi-site quote is not a new multi-site quote, but a new version of the source multi-site quote.
    - The revision number of the created multi-site quote is the same as the revision number of the source multi-site quote.
    - The version number of the created multi-site quote is different from the version number of the source multi-site quote. The highest version number associated with the revision number of the source multi-site quote is increased by a value of 1 to generate the version number of the created multi-site quote.
- 4 Modify the created multi-site quote.

For information about modifying the new version of a new multi-site quote, see [“Process of Creating New Multi-Site Quotes \(End User\)” on page 122](#). For information about modifying the new version of a multi-site quote revision, see [“Process of Creating Multi-Site Quote Revisions \(End User\)” on page 140](#).

## Validating Multi-Site Quotes (End User)

While developing a multi-site quote, you can validate it. The validation process makes sure the information in the multi-site quote has no errors. For example, if the entry date for a site record that you add to a product group in the multi-site quote is earlier than the requested date for the multi-site quote, then the validation process displays an error message. For more information, see [“About the Validation of Multi-Site Quotes” on page 159](#).

When you review order line items for multi-site quotes, or when you submit multi-site quotes, the validation process runs before the order line items are created. When you validate multi-site quotes, order line items are not created. For more information, see [“Reviewing Order Line Items for Multi-Site Quotes \(End User\)”](#) on page 138.

### ***To validate a multi-site quote***

- 1 Navigate to the Multi-Site Quotes screen, then the List view.
- 2 Drill down on the name of the multi-site quote.
- 3 Click Validate.

If the validation process finds an error in the information for the multi-site quote, then an error message appears.

- 4 If an error message appears, then change the information in the multi-site quote to correct the validation error, and repeat [Step 3](#) until an error message does not appear.

## **Reviewing Order Line Items for Multi-Site Quotes (End User)**

While developing a multi-site quote, you can trigger a decomposition process that creates the order line items for the services that are associated with the products in the multi-site quote. When you change existing products in a multi-site quote revision, the decomposition process might mark for cancellation previously submitted order line items that are cancelled because of your changes in the multi-site revision. You can review all order line items at any time before you submit the multi-site quote. For more information, see [“Submitting Multi-Site Quotes \(End User\)”](#) on page 139.

Before you forward the multi-site quote to other employees or the customer for review, you can review these order line items to verify whether the multi-site quote generates the order line items that you anticipate. You can change the information in the multi-site quote, trigger the decomposition process again, and review the order line items until the correct order line items are generated.

If a multi-site quote has many sites, products, and billing accounts, then the decomposition process can take a long time. This process is an asynchronous process, so you can continue to work in Siebel Energy while the process occurs. For more information, see [“About the Decomposition of Multi-Site Quotes”](#) on page 160.

### ***To review the order line items for a multi-site quote***

- 1 Navigate to the Multi-Site Quotes screen, then the List view.
- 2 Drill down on the name of the multi-site quote.

**3** Click Preview Order.

The value in the Processing Status field shows the status of the decomposition process. You can click Refresh to view the most current status of the decomposition process. When the decomposition process is complete, the field value changes to Completed.

If the validation process finds an error in the information for the multi-site quote, then an error message appears.

**4** If an error message appears, then change the information in the multi-site quote to correct the validation error, and repeat the [Step 3](#) until an error message does not appear.

**5** Click the View Order Line Items view tab to view the order line items when the decomposition process is complete.

For a multi-site quote revision, this view displays only new order line items. This view does not display previously submitted order line items that are cancelled because of changes in the multi-site revision.

**6** Review the order line items to make sure they are correct.

You can query for specific order line items and sort the order line items by field.

**7** Click the Cancelled Order Line Items view tab to view information about the order line items that are marked for cancellation.

To view details about these order line items, you can search for the values in some fields of this view. For example, you can search for the value in the Order Number field in the List view of the Sales Order screen.

## Submitting Multi-Site Quotes (End User)

After you finish changing the information in a multi-site quote, and the customer approves it, you can submit the multi-site quote to the order-provisioning system. When you submit a multi-site quote, the same decomposition process is triggered as when you review the order line items, and the submit workflow is triggered. The submit workflow submits any new order line items and any cancellations of previously submitted order line items to the order-provisioning system. For more information, see [“Submit MS Quote WF Workflow” on page 166](#).

Before you submit a multi-site quote, you can validate it to make sure the information in the multi-site quote has no errors, and you can review the order line items to verify whether the multi-site quote generates the order line items that you anticipate. For more information, see [“Validating Multi-Site Quotes \(End User\)” on page 137](#) and [“Reviewing Order Line Items for Multi-Site Quotes \(End User\)” on page 138](#).

Before you submit a multi-site quote, make sure its requested date is set up to allow the order-provisioning system enough time to process the order line items. For more information, see [“About the Requested Date Field for Multi-Site Quotes” on page 156](#).

The Submit Order button is enabled only before you submit a multi-site quote, and it is disabled after you submit that quote. Because the order line items are submitted to the order-provisioning system after you submit a multi-site quote, you cannot change, decompose, or resubmit that multi-site quote, and you cannot submit other multi-site quotes with the same multi-site quote number and the same revision number. However, you can create a multi-site quote revision of a submitted multi-site quote to change the contract services, and then you can submit that multi-site quote revision. For more information, see [“Process of Creating Multi-Site Quote Revisions \(End User\)” on page 140](#).

### ***To submit a multi-site quote***

- 1 Navigate to the Multi-Site Quotes screen, then the List view.
- 2 Drill down on the name of the multi-site quote.
- 3 Click Submit Order.

The value in the Processing Status field shows the status of the decomposition process. You can click Refresh to view the most current status of the decomposition process. When the decomposition process is complete the field value changes to Completed.

After the multi-site quote is submitted, the value in the Status field for the multi-site quote changes to Order Placed.

- 4 Click the View Order Line Items view tab to view the submitted order line items when the decomposition process is complete.

For a multi-site quote revision, this view displays only new order line items. This view does not display previously submitted order line items that are cancelled because of changes in the multi-site revision.

- 5 Click the Cancelled Order Line Items view tab to view information about the order line items that are marked for cancellation.

To view details about these order line items, you can search for the values in some fields of this view. For example, you can search for the value in the Order Number field in the List view of the Sales Order screen.

## **Process of Creating Multi-Site Quote Revisions (End User)**

To create a multi-site quote revision, perform the following tasks:

- [“Creating Records for Multi-Site Quote Revisions” on page 141](#)
- [“Associating New Sites with Multi-Site Quote Revisions” on page 142](#)
- [“Adding Product Groups to Multi-Site Quote Revisions” on page 144](#)
- [“Adding Sites to Product Groups for Multi-Site Quote Revisions” on page 144](#)
- [“Deactivating Sites in Product Groups for Multi-Site Quote Revisions” on page 145](#)
- [“Changing Exit Date of Sites in Product Groups for Multi-Site Quote Revisions” on page 147](#)

- [“Adding Products to Product Groups for Multi-Site Revisions” on page 148](#)
- [“Changing Configurations of Existing Products for Multi-Site Revisions” on page 149](#)
- [“Retiring Existing Products from Product Groups for Multi-Site Quote Revisions” on page 151](#)
- [“Changing the Retirement Dates of Products for Multi-Site Quote Revisions” on page 152](#)
- [“Changing the Inclusion Dates of Products for Multi-Site Quote Revisions” on page 153](#)
- [“Changing the Billing Account Associations with Sites for Multi-Site Quote Revisions” on page 154](#)

## Creating Records for Multi-Site Quote Revisions

You can create a record for a multi-site quote revision by copying a source multi-site quote. The revision inherits the field data for site characteristics, product groups, and billing groups in the source multi-site quote. However, the field data in the revision is similar to (but not identical to) the field data in the source multi-site quote. In the revision, you can change the information that is applicable to the contract services that you provide to the customer. For more information, see [“About Data Transformation in Multi-Site Quote Revisions” on page 162](#).

You can create a multi-site quote revision only for a submitted multi-site quote. The Revise button is disabled for a multi-site quote that is not submitted. You can click the Revise button multiple times for a submitted multi-site quote. Each resulting multi-site quote revision has the same revision number (the revision number of the source multi-site quote plus 1), has a different version number (the version number of the last revision plus 1), and inherits the same field data from the source multi-site quote. You can submit only one version of a multi-site quote revision. An error message appears when you attempt to submit another version.

Also, you can click the New Version button multiple times for a multi-site quote revision. Each resulting multi-site quote revision has the same revision number as the source multi-site quote, has a different version number (the version number of the last revision plus 1), and inherits the exact field data in the source multi-site revision. For more information about new versions, see [“Creating New Versions of Multi-Site Quotes \(End User\)” on page 136](#).

You can delete the record for a multi-site quote revision if you have not yet submitted that multi-site revision.

This task is a step in [“Process of Creating Multi-Site Quote Revisions \(End User\)” on page 140](#).

### ***To create a record for a multi-site quote revision***

- 1 Navigate to the Multi-Site Quotes screen, then the List view.
- 2 Drill down on the name of the multi-site quote.

**3** Click Revise.

A record for the multi-site quote revision is created in the list of multi-site quotes. The multi-site quote number and name of the record for the created multi-site quote are the same as the multi-site quote number and name of the source multi-site quote, but you can change the name. When you submit the created multi-site quote, it reflects modifications of an original contract with the customer.

The revision number and the version number of the record for the created multi-site quote are determined as follows:

- The revision number of the source multi-site quote is increased by a value of 1 to generate the revision number of the record for the created multi-site quote.
- The highest version number associated with the revision number of the record for the created multi-site quote is increased by a value of 1 to generate the version number of the record for the created multi-site quote.

**4** Change the value in the Requested Date field to the date and time that you expect to submit the multi-site quote revision.

Before you submit the multi-site quote, you can change this field value to a different date and time. You cannot select a field value that is earlier than the requested date in the source multi-site quote. For more information, see [“About the Requested Date Field for Multi-Site Quotes” on page 156](#).

## Associating New Sites with Multi-Site Quote Revisions

A multi-site quote revision inherits the field data for the site characteristics in the source multi-site quote. When characteristics of existing sites change, you can enter these changes in the Site Characteristics view.

You can associate new sites with multi-site quote revisions when the customer adds new locations to the contract. The task of associating new sites with multi-site quote revisions is comparable to the task of associating sites with new multi-site quotes. For more information about this task, see [“Associating Sites with New Multi-Site Quotes” on page 125](#).

Before you submit a multi-site quote revision, you can delete a new site record that you associate with it. The records in the Product Groups view and Billing Groups view for that site record are also deleted. You cannot delete existing site records that are inherited from a source multi-site quote. If you change the Service Account field or Service Point field on a site record, the same fields in the records in the Product Groups view and Billing Groups view for that site record are also changed.

This task is a step in [“Process of Creating Multi-Site Quote Revisions \(End User\)” on page 140](#).

### *To associate new sites with a multi-site quote revision*

- 1** Navigate to the Multi-Site Quotes screen, then the List view.
- 2** Drill down on the name of the multi-site quote.

Check the revision number and version number of the quote to make sure that you open the correct quote.

- 3 Click the Site Characteristics view tab.
- 4 If you want to associate a single site with the multi-site quote revision, then add a record to the Site Characteristics list, and complete the necessary fields.

For more information about the fields, see [Step 4 of "Associating Sites with New Multi-Site Quotes" on page 125](#).

- 5 If you want to simultaneously associate multiple sites with the multi-site quote revision, then complete either of the following steps:
  - Click Add Service Accounts, select multiple service accounts in the dialog box that appears, and click OK to close the dialog box.

In the dialog box, you can query for the records that you want to view, hold down the CTRL key and then click the A key to select all records, and hold down the CTRL key and then click each record to select individual records.

If you select service accounts that already appear in the Site Characteristics list, then those service accounts are not added to the list again.

- Click Add Service Points, select multiple combinations of service accounts and service points in the dialog box that appears, and click OK to close the dialog box.

In the dialog box, you can query for the records that you want to view, hold down the CTRL key and then click the A key to select all records, and hold down the CTRL key and then click each record to select individual records.

If you select combinations that already appear in the Site Characteristics list, then those combinations are not added to the list again.

- 6 If necessary, complete the other fields for the added records in the Site Characteristics list.  
For more information about the fields, see [Step 4 of "Associating Sites with New Multi-Site Quotes" on page 125](#).

- 7 If you want to delete multiple site records that you just associated with the multi-site quote revision, then complete the following steps:
  - a Select the records as follows:
    - To select all records, hold down the CTRL key, and click the A key.
    - To select multiple adjacent records, click the first record, hold down the SHIFT key, and click the last record.
    - To select multiple nonadjacent records, hold down the CTRL key, and click each record.
  - b Click MultiDelete.

## Adding Product Groups to Multi-Site Quote Revisions

A multi-site quote revision inherits the field data for product groups in the source multi-site quote. You can add product groups to multi-site quote revisions when you must change the association between sites and products for the contract with the customer, and no existing product group is suitable for these new associations. The task of adding product groups to multi-site quote revisions is comparable to the task of adding product groups to new multi-site quotes. For more information about this task, see [“Adding Product Groups to New Multi-Site Quotes” on page 128](#).

Before you submit a multi-site quote revision, you can delete a product group record that you add to it. The records in the Sites list and the Products list for that product group are also deleted. You cannot delete the product groups that are inherited from the source multi-site quote. However, you can change the sites and products that are associated with these product groups.

This task is a step in [“Process of Creating Multi-Site Quote Revisions \(End User\)” on page 140](#).

### *To add a product group to a multi-site quote revision*

- 1 Navigate to the Multi-Site Quotes screen, then the List view.
- 2 Drill down on the name of the multi-site quote.  
Check the revision number and version number of the quote to make sure that you open the correct quote.
- 3 Click the Product Groups view tab.
- 4 In the Product Groups list, add a record, and complete the necessary fields.  
For more information about the fields, see [Step 4 of “Adding Product Groups to New Multi-Site Quotes” on page 128](#).

## Adding Sites to Product Groups for Multi-Site Quote Revisions

A multi-site quote revision inherits the field data for sites in product groups in the source multi-site quote. You can add sites to product groups in multi-site quote revisions when the customer adds locations to the contract or changes service conditions at locations in the contract.

Before you submit a multi-site quote revision, you can delete a site record that you add to a product group in it. You cannot delete the sites that are inherited from the source multi-site quote. Deleting a site record is not the same as deactivating a site record. For more information, see [“Deactivating Sites in Product Groups for Multi-Site Quote Revisions” on page 145](#).

This task is a step in [“Process of Creating Multi-Site Quote Revisions \(End User\)” on page 140](#).

### *To add sites to a product group for a multi-site quote revision*

- 1 Navigate to the Multi-Site Quotes screen, then the List view.



- 2 Drill down on the name of the multi-site quote.

Check the revision number and version number of the quote to make sure that you open the correct quote.

- 3 Click the Product Groups view tab, and select a record in the Product Groups list.
- 4 Click Sites in the link bar to navigate to the Sites view.
- 5 If you want to add a single site to the product group for the multi-site quote revision, then add a record to the Sites list, and complete the necessary fields, such as the Entry Date field and the Exit Date field.

For more information about the fields, see [Step 5 of “Adding Sites to Product Groups for New Multi-Site Quotes” on page 128](#).

- 6 If you want to simultaneously add multiple sites to the product group for the multi-site quote revision, then complete the following steps:
  - a Click Add Multiple Sites, select multiple sites in the dialog box that appears, and click OK to close the dialog box.

In the dialog box, you can query for the records you want to view, hold down the CTRL key and then click the A key to select all records, and hold down the CTRL key and then click each record to select individual records.

- b Complete the other fields, such as the Entry Date field and the Exit Date field, for the added records in the Sites list.

For more information about the fields, see [Step 5 of “Adding Sites to Product Groups for New Multi-Site Quotes” on page 128](#).

- 7 If you want to delete multiple site records that you just added to the product group, then complete the following steps:
  - a Select the records as follows:
    - To select all records, hold down the CTRL key, and click the A key.
    - To select multiple adjacent records, click the first record, hold down the SHIFT key, and click the last record.
    - To select multiple nonadjacent records, hold down the CTRL key, and click each record.
  - b Click MultiDelete.

## Deactivating Sites in Product Groups for Multi-Site Quote Revisions

You deactivate sites in product groups for multi-site quote revisions when you want to cancel the services that are associated with the products in the product groups for those sites. You can deactivate these sites to cancel these services in the following situations:

- Services at the site have not yet started on the date and time that is associated with the requested date. In this situation, the entry date for the site record is later than the requested date for the multi-site quote revision.

- Services at the site have stopped on the date and time that is associated with the requested date. In this situation, the exit date for the site record is earlier than the requested date for the multi-site quote revision.

If services at the site are currently being provided on the date and time that is associated with the requested date, then you cannot deactivate the site. To cancel such services, you must first stop the services by changing the exit date for the site. For more information, see ["Changing Exit Date of Sites in Product Groups for Multi-Site Quote Revisions"](#) on page 147.

When you submit the multi-site quote revision with a deactivated site, order line items to cancel the services at that site are submitted to the order-provisioning system. These order line items have a due date that is the same as the requested date for the multi-site quote revision, and these order line items have a value of Delete in the Action field. If the order-provisioning system is properly integrated with Siebel Energy, then the appropriate contract services are closed in the order-provisioning system, and the corresponding installed assets are deactivated in Siebel Energy.

If you want to deactivate a site for a multi-site quote revision so that you can restart stopped services at the site, then you must submit the multi-site quote revision after you deactivate the site. Then you must create a revision of the multi-site quote revision to add the site again to the product group. The value in the Site Status field for the prior multi-site quote revision is Inactive, and the value in the Site Status field for the new multi-site quote revision is Active. Therefore, you can add the same site to the new multi-site quote revision without seeing an error message about duplicate site records.

This task is a step in ["Process of Creating Multi-Site Quote Revisions \(End User\)"](#) on page 140.

### ***To deactivate a site in a product group for a multi-site quote revision***

- 1 Navigate to the Multi-Site Quotes screen, then the List view.
- 2 Drill down on the name of the multi-site quote.  
Check the revision number and version number of the quote to make sure that you open the correct quote.
- 3 Click the Product Groups view tab, and select a record in the Product Groups list.
- 4 Click Sites in the link bar to navigate to the Sites view, and select the record for the site that you want to deactivate.
- 5 Click DeActivate.

The value in the Action field for the site record changes to Deactivate. The value of Active in the Site Status field does not change. However, if you create a multi-site quote revision for this multi-site quote revision, then the value in the Site Status field changes to Inactive in the new multi-site quote revision.

## Changing Exit Date of Sites in Product Groups for Multi-Site Quote Revisions

You can change the exit date of the sites in a product group for a multi-site quote revision when the period that the sites are subject to the services that are associated with the products in the product group changes. This period can change when the customer changes the closing dates for its locations.

You also change this date because service conditions for a site change, and you must stop the services that are associated with the products in the product group for the site, and then add that site to another product group. For such a site move from one product group to another product group, make sure the exit date for the site in the first product group and the entry date for the site in the second product group are the date and time of the service change for the site.

You can change only the exit dates that are later than the requested date of the multi-site quote revision. That is, you can change service periods only for services that have not yet stopped.

When you change the period that a site is subject to the services that are associated with the products in a product group, the order line items that are generated from the multi-site quote revision include the corresponding changes to the services that are provided at the site. These changes can include the following changes:

- The period for services that are associated with the products in the product group can change.
- A new service for a product might be created when an overlap is created. An overlap is created when part of the period for a site in a product group is the same as part of the period for a product in that product group. The entry and exit dates denote the period for a site, and the inclusion and retirement dates denote the period for the service of a product.
- An existing service for a product might be cancelled when such an overlap is deleted.

This task is a step in ["Process of Creating Multi-Site Quote Revisions \(End User\)"](#) on page 140.

### ***To change the exit date of a site in a product group for a multi-site quote revision***

- 1 Navigate to the Multi-Site Quotes screen, then the List view.
- 2 Drill down on the name of the multi-site quote.  
Check the revision number and version number of the quote to make sure that you open the correct quote.
- 3 Click the Product Groups view tab, and select a record in the Product Groups list.
- 4 Click Sites in the link bar to navigate to the Sites view, and select the record for the site that you want to modify.

- 5 Change the value in the Exit Date field for the site.

This field is described in the following table.

Field	Comments
Exit Date	<p>Select the date and time that the site is last subject to the services that are associated with the products in the product group. When this field is blank, the site is subject to the services that are associated with the products in the product group as long as the services are in effect.</p> <p>You can change this field value only when it is later than the requested date for the multi-site quote revision. You can change this field value only to a value that is the same as or later than the requested date for the multi-site revision.</p> <p>The exit date must be later than the entry date. For more information about the exit date, see <a href="#">"Adding Sites to Product Groups for New Multi-Site Quotes"</a> on page 128.</p>

The value in the Action field for the site record changes to Update.

## Adding Products to Product Groups for Multi-Site Revisions

A multi-site quote revision inherits the field data for products in product groups in the source multi-site quote. You can add products to product groups for multi-site quote revisions when the customer adds services to the locations in the contract or when the customer adds locations with new services to the contract.

Before you submit a multi-site quote revision, you can delete a product record that you add to a product group in it. You cannot delete the products that are inherited from the source multi-site quote. However, you can retire the product from the product group. For more information, see ["Retiring Existing Products from Product Groups for Multi-Site Quote Revisions"](#) on page 151.

This task is a step in ["Process of Creating Multi-Site Quote Revisions \(End User\)"](#) on page 140.

### *To add a product to a product group for a multi-site quote revision*

- 1 Navigate to the Multi-Site Quotes screen, then the List view.
- 2 Drill down on the name of the multi-site quote.  
Check the revision number and version number of the quote to make sure that you open the correct quote.
- 3 Click the Product Groups view tab, and select a record in the Product Groups list.
- 4 Click Products in the link bar to navigate to the Products view.

- 5 In the Products list, add a record, and complete the necessary fields.

For more information about the fields, see [Step 5 of “Adding Products to Product Groups for New Multi-Site Quotes” on page 131.](#)

- 6 If necessary, configure the product.

For more information about configuring the product, see [Step 6 of “Adding Products to Product Groups for New Multi-Site Quotes” on page 131.](#)

## Changing Configurations of Existing Products for Multi-Site Revisions

A multi-site revision inherits the field data for the configurations of the existing products in the source multi-site quote. You can change the configurations of the existing products for a multi-site quote revision when the customer changes the conditions for the services that are associated with those products.

Earlier multi-site revisions of a multi-site revision can include various configuration changes of products. The value that you select in the Effective Date field when you change the configurations of existing products affects these existing configuration changes as follows:

- If you select an effective date that is later than the effective date for all the existing configuration changes, then your change is added to the sequence of existing configuration changes.
- If you select an effective date that is earlier than the effective date for some existing configuration changes and later than the effective date for other existing configuration changes, then when you submit the multi-site quote, the following outcomes occur:
  - The existing configuration changes that have effective dates that are earlier than the effective date for your configuration change are retained.
  - The existing configuration changes that have effective dates that are later than the effective date for your configuration change are cancelled. A message alerts you of this situation when you enter a value in the Effective Date field for your configuration change. If necessary, you can add one or more of these cancelled configuration changes when you create additional multi-site quote revisions.

If you make configuration changes to a retired product, then the configuration changes cancel the retirement. If necessary, you can retire the product again in a revision of the multi-site revision.

This task is a step in [“Process of Creating Multi-Site Quote Revisions \(End User\)” on page 140.](#)

### *To configure an existing product for a multi-site quote revision*

- 1 Navigate to the Multi-Site Quotes screen, then the List view.
- 2 Drill down on the name of the multi-site quote.

Check the revision number and version number of the quote to make sure that you open the correct quote.

- 3 Click the Product Groups view tab, and select a record in the Product Groups list.

- 4 Click Products in the link bar to navigate to the Products view, and select a record in the Products list.

A product record for an existing service does not have a value of Add in the Action field.

- 5 Configure the product by completing the following steps:

- a Select the effective date of the configuration in the Effective Date field.

Any value in the Retirement Date field is deleted. The effective date of the configuration must be the same as or later than the requested date for the multi-site quote revision, the same as or later than the inclusion date for the product record, and the same as or earlier than the retirement date, if any, for the product record.

- b Click Customize to open Siebel Configurator and start a configuration session for the product record.

The configuration session shows the configuration in effect on the effective date that you select.

**NOTE:** The Customize button is enabled only for products that you can configure. The customize feature is available only if you licensed Siebel Configurator.

- c Configure the product, and add, remove, and configure its components as necessary.

You use Siebel Configurator in the same way that you use it when you configure the products for any quote or order in Siebel Business Applications. For more information, see *Siebel Order Management Guide*.

- d Close the configuration session.

If you do not configure the product, the value in the Action field for the product record changes to - (dash). You must also delete the value that you selected for the effective date of the configuration.

If you configure the product, the value in the Action field for the product record changes to Update, and the value in the Action field for the applicable product attributes of the product record changes to the appropriate value.

## About Configuration Changes That Are Not Yet Effective

If the effective date for a configuration change is later than the requested date for the multi-site quote revision, then the configuration change is not yet effective. For existing configuration changes in previous multi-site quote revisions that are not yet effective, you can perform the following actions:

- Cancel some of these existing changes, and retain the rest of these existing changes.

For this action, retire the product, and select an effective date for the retirement that is the same as the earliest effective date for the existing changes that you want to cancel. Add the same product to the same product group, and select the effective date for this existing change again in the Effective Date field of the added product record. Configure the product again for the existing changes that are earlier than this existing change.

- Change the effective date for one of these existing changes to an earlier date and time.

For this action, configure the product again, and select the earlier effective date for the existing change. Any existing changes that have effective dates that are later than the new effective date are cancelled. Also, any retirement of the product is cancelled. If necessary, you can add these cancelled changes and retire the product again when you create additional multi-site quote revisions.

- Change the effective date for one of these existing changes to a later date and time.

For this action, retire the product, and select an effective date for the retirement that is the same as the effective date for this existing change. Add the same product to the same product group, and select the effective date for this existing change again in the Effective Date field of the added product record. Configure the product again for the existing changes that are earlier than this existing change. In a revision of the multi-site revision, configure the product again, and select the later effective date for this existing change.

## Retiring Existing Products from Product Groups for Multi-Site Quote Revisions

You can retire products from a product group for a multi-site quote revision when you want to cancel the services that are associated with the products. You might replace a retired product with a new product. You can add a product that already exists in the Products list because duplicate records are allowed in this list.

You can retire existing products from product groups in multi-site quote revisions for the following situations:

- You want to cancel the services for a product before those services start. The services for the product have not yet started because the inclusion date for the product is later than the requested date of the multi-site quote revision. In this situation, you select an effective date for the retirement that is the same as the requested date for the multi-site revision and earlier than the inclusion date for the product.
- You want to cancel the services for a product after those services start. In this situation, you select an effective date for the retirement that is the same as or later than the requested date for the multi-site quote revision and later than the inclusion date for the product.

When you submit the multi-site quote revision with a retired product, order line items to cancel the service that is associated with the product are submitted to the order-provisioning system. These order line items have a due date that is the same as the effective date for the product retirement, and these order line items have a value of Delete in the Action field. If the retired product has configuration changes that are effective after the retirement date, then order line items to cancel these configuration changes are also submitted to the order-provisioning system.

If you retire a product with an effective date that is earlier than the effective date of configuration changes for the product, then a message alerts you of this situation when you enter a value in the Effective Date field for your product retirement.

This task is a step in [“Process of Creating Multi-Site Quote Revisions \(End User\)”](#) on page 140.

### ***To retire an existing product from a product group for a multi-site quote revision***

- 1** Navigate to the Multi-Site Quotes screen, then the List view.
- 2** Drill down on the name of the multi-site quote.  
Check the revision number and version number of the quote to make sure that you open the correct quote.
- 3** Click the Product Groups view tab, and select a record in the Product Groups list.
- 4** Click Products in the link bar to navigate to the Products view, and select the product record for the product that you want to retire.  
A product record for an existing service does not have a value of Add in the Action field.
- 5** Click Delete in the Products list.  
The value in the Action field for the product record changes to Delete.
- 6** Select the effective date for the retirement in the Effective Date field.  
Later, in a multi-site quote revision of this multi-site revision, you can change this retirement date to an earlier date and time. For more information, see [“Changing the Retirement Dates of Products for Multi-Site Quote Revisions” on page 152.](#)

## **Changing the Retirement Dates of Products for Multi-Site Quote Revisions**

You can change the retirement dates of the products in a product group for a multi-site quote revision when the period changes for the services that are associated with those products.

This task is a step in [“Process of Creating Multi-Site Quote Revisions \(End User\)” on page 140.](#)

### **Changing the Retirement Dates of Products to Earlier Values**

To change the retirement date of a product to an earlier value, follow this procedure.

#### ***To change the retirement date of a product to an earlier value***

- Retire the product from the product group again, and select the earlier value for the retirement date in the Effective Date field of the product record.

Also, the retirement date must be the same as or later than the requested date of the multi-site quote revision.

For more information about the steps to retire a product from a product group, see [“Retiring Existing Products from Product Groups for Multi-Site Quote Revisions” on page 151.](#)

Although the earlier value for retirement date applies to the multi-site quote revision, this value does not appear in the Retirement Date field for the product record until you create another revision of the multi-site quote revision.



## Changing the Retirement Dates of Products to Later Values

To change the retirement date of a product to a later value, follow this procedure. You can change the retirement date of a product only when the retirement is not yet effective because the retirement date for the product is later than the requested date of the multi-site quote revision

### *To change the retirement date of a product to a later value*

- 1 Add the same product to the same product group, and select the value of the retirement date of the original product in the Effective Date field of the added product record.

For more information about the steps to add a product to a product group, see [“Adding Products to Product Groups for Multi-Site Revisions” on page 148.](#)

- 2 If necessary, configure the added product with the last configuration of the original product.
- 3 Create a revision of the multi-site revision.

For more information about the steps to create a revision of a multi-site revision, see [“Creating Records for Multi-Site Quote Revisions” on page 141.](#)

- 4 Retire the added product from the product group, and select the later value for the retirement date in the Effective Date field of the added product record.

For more information about the steps to retire a product from a product group, see [“Retiring Existing Products from Product Groups for Multi-Site Quote Revisions” on page 151.](#)

## Changing the Inclusion Dates of Products for Multi-Site Quote Revisions

You can change the inclusion dates of the products in a product group for a multi-site quote revision when the period changes for the services that are associated with those products. You can change the inclusion date of a product only when the services for the product have not yet started because the inclusion date for the product is later than the requested date of the multi-site quote revision.

This task is a step in [“Process of Creating Multi-Site Quote Revisions \(End User\)” on page 140.](#)

### *To change the inclusion date of a product for a multi-site quote revision.*

- 1 Retire the product from the product group, and select an effective date for the retirement that is the same as the requested date for the multi-site revision.

For more information about the steps to retire a product from a product group, see [“Retiring Existing Products from Product Groups for Multi-Site Quote Revisions” on page 151.](#)

- 2 Create a revision of the multi-site revision.

For more information about the steps to create a revision of a multi-site revision, see [“Creating Records for Multi-Site Quote Revisions” on page 141.](#)

- 3 Add the same product to the same product group, and select the new inclusion date in the Effective Date field of the added product record.

For more information about the steps to add a product to a product group, see [“Adding Products to Product Groups for Multi-Site Revisions” on page 148](#).

- 4 If the original product was configured or retired, configure or retire the product again.

For more information about the steps to configure a product, see [“Changing Configurations of Existing Products for Multi-Site Revisions” on page 149](#).

Although the new inclusion date applies to the multi-site quote revision, this date does not appear in the Inclusion Date field for the product record until you create another revision of the multi-site quote revision.

## Changing the Billing Account Associations with Sites for Multi-Site Quote Revisions

A multi-site quote revision inherits the field data for billing accounts that are associated with sites in the source multi-site quote. You can change these billing account associations for a multi-site quote revision when the customer changes the billing accounts for the provided services at locations.

Earlier multi-site revisions of a multi-site revision can include existing changes of the billing account associations with sites. The value that you select in the Billing Transfer Date field when you change the billing account association with a site affects these existing changes as follows:

- If you select a billing transfer date that is later than the billing transfer date for all the existing changes, then your change is added to the sequence of existing changes.
- If you select a billing transfer date that is earlier than the billing transfer date for some existing changes and later than the billing transfer date for other existing changes, then when you submit the multi-site quote, the following outcomes occur:
  - The existing changes that have billing transfer dates that are earlier than the billing transfer date for your change are retained.
  - The existing changes that have billing transfer dates that are later than the billing transfer date for your change are cancelled. If necessary, you can add these cancelled changes when you create additional multi-site quote revisions.

This task is a step in [“Process of Creating Multi-Site Quote Revisions \(End User\)” on page 140](#).

### *To change the billing account association with a site for a multi-site quote revision*

- 1 Navigate to the Multi-Site Quotes screen, then the List view.
- 2 Drill down on the name of the multi-site quote.

Check the revision number and version number of the quote to make sure that you open the correct quote.

- 3 Click the Billing Groups view tab, and select the record for the billing account association that you want to change.

4 Click Transfer.

The value in the Action field for the selected record changes to Transfer.

5 Change the value in the Billing Account field and the Billing Transfer Date field of the record for the billing account association.

These fields are described in the following table.

Field	Comments
Billing Account	Select the new billing account for the site record. Only the billing accounts included in the account hierarchy for the account that you select for the multi-site quote revision are available for selection. If you change the account for the multi-site quote, then you can select a billing account from a different account hierarchy.
Billing Transfer Date	Select the date and time that the billing account change for the site record is effective. You can select only a value that is the same as or later than the requested date for multi-site quote revision.  Before you submit the multi-site quote revision, you can change the value in the Billing Transfer Date field. If you subsequently change the value in the Requested Date field to a date and time that is later than the value in the Billing Transfer Date field, then the multi-site quote revision becomes invalid. You are alerted about this invalidation when you validate the multi-site quote revision, attempt to review the order line items for the multi-site quote revision, or attempt to submit the multi-site quote revision. You must then change the value in the Billing Transfer Date field or the Requested Date field before you submit the multi-site quote revision.

### About Changes of Billing Account Associations That Are Not Yet Effective

If the billing transfer date of a change in billing account association is later than the current date, then the change of billing account association is not yet effective. For existing changes of the billing account associations in previous multi-site quote revisions that are not yet effective, you can perform the following actions:

- Cancel some of these existing changes, and retain the rest of these existing changes.

For this action, change the billing account association again, and select a billing transfer date that is earlier than the billing transfer date for the existing changes that you want to cancel and later than the billing transfer date for the existing changes that you want to retain. Also, select the billing account for the latest existing change that you want to retain.

- Change the billing transfer date for one of these existing changes to an earlier date and time.

For this action, change the billing account association again, and select the earlier billing transfer date for the existing change. Also, select the billing account again for this existing change. Any existing changes that have billing transfer dates that are later than the new billing transfer date are cancelled. If necessary, you can add these cancelled changes when you create additional multi-site quote revisions.

- Change the billing transfer date for one of these existing changes to a later date and time.

For this action, cancel the existing change, and retain the existing changes earlier than it. For more information about this task, see the preceding bullet point about cancelling some existing changes and retaining the rest of these existing changes. In a revision of the multi-site revision, change the billing account association again, and select the later billing transfer date for this cancelled change. Also, select the billing account again for this cancelled change. Any existing changes that have billing transfer dates that are later than the new billing transfer date are cancelled. If necessary, you can add these cancelled changes when you create additional multi-site quote revisions.

## About the Requested Date Field for Multi-Site Quotes

When you submit a multi-site quote, order line items are generated for the services that are associated with the products in that multi-site quote. Each order line item has a due date that designates that date and time that the order-provisioning system must execute the ordering instructions. This due date is important when processing multiple order line items that are submitted to change the same service. Also, this due date is always the same as or later than the requested date for the multi-site quote.

The Requested Date field is a required field for multi-site quotes and displays one day after the current date by default when you create new multi-site quotes. However, it is recommended that you change the requested date to a later date to allow sufficient time for you to finalize the multi-site quote, for people inside and outside of your organization to validate and approve the quote, for the customer to review and approve the quote, and for the order-provisioning system to prepare to execute the order line items for the quote on the due dates of those order line items.

The time interval that the order-provisioning system needs to prepare to execute the order line items in a multi-site quote is different for each organization. Developers in your organization can configure the multi-site ordering module so that users can submit multi-site quotes no later than the requested date less this time interval for your organization. For example, if the requested date of a multi-site quote is May 15th, and this time interval is 1 day, then users can submit this multi-site quote no later than May 16th.

For help with configuring this time interval, create a service request (SR) on My Oracle Support. Alternatively, you can phone Oracle Global Customer Support directly to create a service request or get a status update on your current SR. Support phone numbers are listed on My Oracle Support.

When you are ready to submit the multi-site quote to the order-provisioning system, sometimes the requested date can be past the acceptable submission date for your organization or past the current date. This situation might occur when internal approval and customer approval of the multi-site quote takes longer than expected. In this situation, you must change the requested date to a suitable date in the future, and then validate the multi-site quote again. To determine this new requested date, consider the time required to change the information in the multi-site quote to correct any validation errors. Also consider the time required to obtain internal approval and customer approval of the multi-site quote when the changes required to correct the validation errors result in changes to the initial contract with the customer.

### Validation Rules for Evaluating the Requested Date

The validation process for a multi-site quote evaluates the requested date by comparing it to other dates in the multi-site quote. The following constraints apply to the requested date:

- The requested date for a multi-site quote determines the valid values for the following fields:
  - **Entry Date.** For new site records, this field value must be the same as or later than the requested date for the multi-site quote. For existing site records in multi-site quote revisions, you cannot change this field.

The entry date must be earlier than the exit date.
  - **Exit Date.** For new site records, this field must be blank, or this field value must be later than the entry date for the multi-site quote. For existing site records in multi-site quote revisions, you can change this field value only when it is later than the requested date for the multi-site quote revision. This field value must be the same as or later than the requested date for the multi-site revision.

The exit date must be later than the entry date.
  - **Effective Date.** For new product records, this field value must be the same as or later than the requested date for the multi-site quote. When you change the configuration of existing products in multi-site quote revisions, this field value must be the same as or later than the requested date for the multi-site quote revision, the same as or later than the inclusion date for the product record, and the same as or earlier than the retirement date, if any, for the product record.

You can retire existing products from product groups in multi-site quote revisions for the following situations:

- You want to cancel the services for a product before those services start. The services for the product have not yet started because the inclusion date for the product is later than the requested date of the multi-site quote revision. In this situation, the value for the effective date must be the same as the requested date for the multi-site revision and earlier than the inclusion date for the product.
- You want to cancel the services for a product after those services start. In this situation, the field value for the effective date must be the same as or later than the requested date for the multi-site quote revision and later than the inclusion date for the product.
- **Billing Transfer Date.** For billing accounts that are associated with sites in multi-site quote revisions, this field value must be the same as or later than the requested date for the multi-site revision.

- The requested date for a multi-site quote revision must be later than the requested date for the source multi-site quote.

## About the Service Type Field for Multi-Site Quotes

The Service Type field denotes the type of service that an energy services company provides at a service point, for example, gas or electricity. It is a required field for a service point and an optional field for a product.

For the quote and order capture module, the Service Type field is used to enforce the validity of the products that are associated with order line items. Order line items with invalid products cannot be created. If an order line item has a service account and a service point, then only the products that are associated with the service type for that service point are valid products for the order line item. If an order line item has a service account and does not have a service point, then all eligible products are valid products for the order line item.

For the multi-site ordering module, the Service Type field as well as the sites and products in a product group are used to enforce the validity of the products that are associated with the sites for order line items. Order line items with invalid product and site associations cannot be created. If a site in a product group has a service account and a service point, then only the products in that product group that are associated with the service type for that service point are valid products for the order line item. If a site in a product group has a service account and does not have a service point, then all products in that product group are valid products for the order line item.

**NOTE:** When you define the child components for a parent product, make sure that the service type for the child components is the same as the service type for the associated parent product. Otherwise, incorrect order line items are created.

Figure 13 shows example data for the sites and products in a product group and the order line items that are created from this example data.

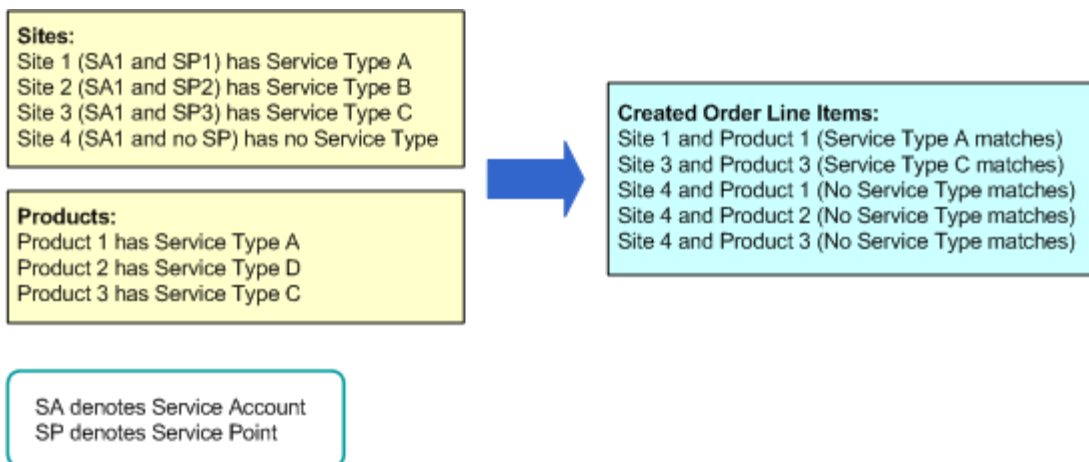


Figure 13. Example Product Group Data and Created Order Line Items

For the multi-site ordering module, developers can configure more restrictions regarding how the Service Type field is used to enforce the validity of products that are associated with order line items. Also, they can remove the use of the Service Type field when enforcing the validity of products that are associated with order line items. For more information, see [“About the Validation of Multi-Site Quotes” on page 159](#).

For help with configuring the Service Type field, create a service request (SR) on My Oracle Support. Alternatively, you can phone Oracle Global Customer Support directly to create a service request or get a status update on your current SR. Support phone numbers are listed on My Oracle Support.

## About the Validation of Multi-Site Quotes

To validate a multi-site quote, the ValidateMSQ method in the MSQ Service business service compares different dates in the multi-site quote to the requested date of the multi-site quote. If the validation process finds an error in the information for the multi-site quote, then you see an error message. The validation of a multi-site quote includes the following validations:

- The product groups are validated as follows:
  - If the ProductSiteTypeMatch user property is TRUE, then all of the sites and products in a product group must have the same service type. If all of the sites and products do not have the same service type, then the validation process shows an error message, and no order line items are created.  
  
If the ProductSiteTypeMatch user property is FALSE, then all of the sites and products in the product group do not have to have the same service type. If all of the sites and products do not have the same service type, then the validation process does not show an error message, and order line items are created only for the sites and products with the same service type.
  - The Billing Account field for the sites in a product group must not be blank.
  - If the Action field for a site in a product group is a value of New, then the Entry Date field for that site must be the same as or later than the requested date for the multi-site quote.
  - If the Action field for a site in a product group is a value of New or Update, then the Exit Date field for that site must be the same as or later than the requested date for the multi-site quote.
- The Effective Date fields for products are validated as follows
  - The value in the Effective Date field must be the same as or later than the requested date for the multi-site quote.
  - When you change the configuration of existing products in multi-site quote revisions, the value in the Effective Date field must not be blank.
  - When you do not change the configuration of existing products in multi-site quote revisions, the value in the Effective Date field must be blank.
- The Billing Transfer Date fields are validated as follows:
  - The value in the Billing Transfer Date field must be the same as or later than the requested date for the multi-site revision.

## About the Decomposition of Multi-Site Quotes

The decomposition process creates the order line items for the services that are associated with the products in a multi-site quote. You must understand Siebel Order Management to understand the decomposition process for multi-site quotes. For more information about Siebel Order Management, see *Siebel Order Management Guide*.

The basic principles of the decomposition process follow:

- An order line item is generated for a service that is associated with a product in a multi-site quote when an overlap is created. An overlap is created when part of the period for a site in a product group of the multi-site quote is the same as part of the period for a product in that product group. The entry and exit dates denote the period for a site, and the inclusion and retirement dates denote the period for the service of a product.
- For each overlap, the service start date for the order line item is the later of the following dates:
  - The entry date for the site
  - The inclusion date for the service of the product
- For each overlap, the service end date for the order line item is the same as the exit date for the site. If the exit date for the site is blank, then the service end date for the order line item is blank.
- If an order line item has a site in a product group that has a service account and a service point, then only the products in that product group that are associated with the service type for that service point are valid products for the order line item. Order line items with invalid products are not created. For more information, see [“About the Service Type Field for Multi-Site Quotes” on page 158](#).
- The billing account for the order line item is determined by the billing account associations with the sites for all the product groups in the multi-site quote.

### Multi-Site Quotes Compared to Other Quotes

Quotes in the multi-site ordering module are associated with product groups. A product group can have multiple sites and multiple products for services. (A site has a service account with a service point or a service account without a service point.) Quotes in the quote and order capture module are not associated with product groups.

Because product groups in the multi-site ordering module can have many combinations of sites and products for order line items, you cannot directly define specific values for order line items, such as their due dates, their service start dates, their service end dates, and their product configurations. Conversely, in the quote and order capture module, you can directly define these specific values. In the multi-site ordering module, these dates and product configuration states are derived from the following dates:

- The entry date and exit date for all sites in the product group
- The inclusion date and retirement date for all products in the product group
- The effective date for the configuration of all products in the product group



The quotes in the quote and order capture module include quote line items, but the quotes in the multi-site ordering module do not include quote line items. However, the decomposition process for the multi-site ordering module generates order line items that are comparable to the order line items for the quote and order capture module. Because the order line items for both modules use the same Siebel object, you can use the multi-site ordering module with minimal impact to the integration of the quote and order capture module with the order-provisioning system.

### Multi-Site Quotes and Installed Assets

The order-to-asset process is the same in the multi-site ordering module and the quote and order capture module. In both modules, installed assets are created from order line items. However, disconnecting or modifying installed assets is different in each module.

When an installed asset originates from an order line item that is created in the quote and order capture module, you can directly disconnect or modify that asset. For example, you can change its service start date or end date, the configuration of the product for it, or its billing account association.

When an installed asset originates from an order line item that is created in the multi-site ordering module, you cannot directly disconnect or modify that asset. In the multi-site ordering module, user input applies to product groups so that you do not have to manage a large number of individual assets. To disconnect or modify the installed assets in a product group, you create a multi-site quote revision, and enter the site changes and product changes in a product group of the revision. Then, after the multi-site quote revision is decomposed to create the order line items, the order-to-asset process implements the changes to the corresponding installed assets for the created order line items.

To maintain the integrity of the decomposition process that creates order line items from multi-site quotes and the integrity of the order-to-asset process that creates installed assets from these order line items, the information in multi-site quotes must always reflect the current state of assets and any pending changes to assets. To ensure this integrity, the order line items and the assets for multi-site quotes are read-only. You cannot directly change specific order line items or individual assets. Instead, you can change order line items and assets only in a multi-site quote revision.

Because all the information related to the history of changes to installed assets is stored in multi-site quotes, the decomposition process does not retrieve information from installed assets to generate order line items. Although the multi-site ordering module does not access records for installed assets, you can still create these records because they might enhance other functionality related to marketing, sales, and service.

Each change that you make in a multi-site quote revision can affect multiple assets. Also, the changes that you make in a multi-site quote revision can result in several changes to the same asset at different due dates. The decomposition process performs the following actions for assets:

- Creates order line items for changes to existing assets and for new assets.
- Cancels order line items for pending changes to assets because of changes in a multi-site revision.
- Replaces cancelled order line items for assets with updated line items for those assets.

# About Data Transformation in Multi-Site Quote Revisions

This topic includes the following information:

- [“Multi-Site Quote Revisions of New Multi-Site Quotes” on page 162](#)
- [“Multi-Site Quote Revisions of Multi-Site Quote Revisions” on page 162](#)

## Multi-Site Quote Revisions of New Multi-Site Quotes

When you create a multi-site quote revision of a new multi-site quote, the revision inherits the field data for the site characteristics, product groups, and billing groups in the source multi-site quote. However, the following field values change:

- The default value in the Requested Date field for the multi-site quote in the revision is 12:00 A.M. and the later date of the following dates:
  - The date after the requested date in the source multi-site quote
  - The date after the current date
- The values in the Action fields for the site records, product records, and records for the billing account associations in the revision are deleted.
- The values in the Effective Date fields for the product records in the revision are deleted.
- The value in the Inclusion Date field for the product records in the revision is the same as the value in the Effective Date field for the corresponding product records in the source multi-site quote. These corresponding product records have a value of Add in the Action field.

## Multi-Site Quote Revisions of Multi-Site Quote Revisions

When you create a multi-site quote revision of a multi-site quote revision, the revision inherits the field data for the site characteristics, product groups, and billing groups in the source multi-site quote. However, the following field values change:

- The default value in the Requested Date field for the multi-site quote in the revision is 12:00 A.M. and the later date of the following dates:
  - The date after the requested date in the source multi-site quote
  - The date after the current date
- The values in the Action fields for the site records, product records, and records for the billing account associations in the revision are deleted.
- The values in the Effective Date fields for the product records in the revision are deleted.
- The value in the Inclusion Date field for the product records in the revision is the same as the value in the Effective Date field for the corresponding product records in the source multi-site quote revision in which the product records were originally added. These corresponding product records have a value of Add in the Action field.

- The value in the Retirement Date field for the product records in the revision is the same as the value in the Effective Date field for the corresponding product records in the source multi-site quote revision in which the product records were last retired. These corresponding product records have a value of Delete in the Action field.
- The values in the Billing Transfer Date fields in the records for the billing account associations in the revision are deleted.
- The values in the Site Status fields for the site records in the revision is Inactive for the corresponding site records in the source multi-site quote revision in which the site records were originally deactivated. These corresponding site records have a value of Deactivate in the Action field.

## About Pricing for Multi-Site Quotes

In the multi-site ordering module, pricing for multi-site quotes is not preconfigured because organizations use different processes for pricing large quotes. Developers in your organization can configure the user interface for multi-site quotes to accommodate pricing information for your organization.

Your organization might want to add a view that includes information that an external pricing engine returns. In this view, sales agents can enter margins and other pricing information for the whole multi-site quote. Alternatively, your organization might want to configure the Product Groups view for multi-site quotes so that you can manage pricing for each product. When you manage pricing for each product, developers can configure multi-site quotes so that prices are associated with the generated order line items.

For help with configuring pricing for multi-site quotes, create a service request (SR) on My Oracle Support. Alternatively, you can phone Oracle Global Customer Support directly to create a service request or get a status update on your current SR. Support phone numbers are listed on My Oracle Support.

## Workflows for Multi-Site Quotes

This group of workflows processes multi-site quotes. It includes the following workflow processes:

- [“MS Quote Preview Item Wrapper Workflow” on page 164](#)
- [“MS Quote Preview Item Process Workflow” on page 165](#)
- [“Submit MS Quote WF Workflow” on page 166](#)
- [“Submit MS Quote SubProcess Workflow” on page 167](#)
- [“MS Quote Submit Cancelled Line Item Workflow” on page 168](#)
- [“SIS OM Edit Delta MS Quote Line Item Workflow” on page 169](#)

## MS Quote Preview Item Wrapper Workflow

This workflow gets the multi-site quote in integration object format, validates the quote, and, if the quote is valid, calls the MS Quote Preview Item Process workflow to execute the decomposition process for the quote. This workflow is called when you click the Preview Order button.

Figure 14 shows this workflow.

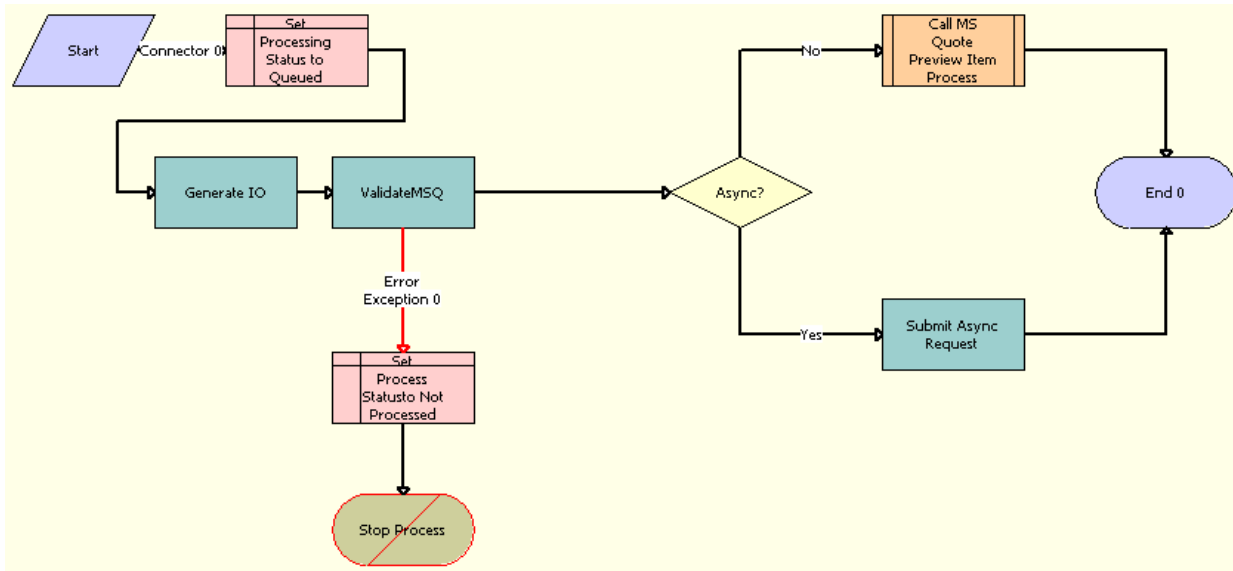


Figure 14. MS Quote Preview Item Wrapper Workflow

**Workflow Description.** This workflow performs the following actions:

- 1 **Set Processing Status to Queued.** This step sets the Process Status field to a value of Queued to indicate that the current multi-site quote is in the queue for the decomposition process.
- 2 **Generate IO.** This step queries the multi-site quote by using the SIS OM MS Quote integration object.
- 3 **ValidateMSQ.** This step calls the ValidateMSQ method in the MSQ Service business service to validate the input (MS Quote).
- 4 **Set Process Status to Not Processed.** This step processes any exception in the previous step, and updates the Process Status field to a value of Not Processed.
- 5 **Async?** This step uses the value in the Enable Multi Site Quote Async system preference to determine to execute the decomposition process in asynchronous mode or synchronous mode. If the system preference is TRUE, then the decomposition process is executed in asynchronous mode. If the system preference is FALSE, then the decomposition process is executed in synchronous mode.

- 6 **Call MS Quote Preview Item Process.** This step calls the MS Quote Preview Item Process workflow to execute the decomposition process in synchronous mode. For more information, see [“MS Quote Preview Item Process Workflow”](#) on page 165.
- 7 **Submit Async Request.** This step submits a server request to run the MS Quote Preview Item Process workflow in asynchronous mode.

## MS Quote Preview Item Process Workflow

This workflow executes the logic for the decomposition process and generates the order line items for the multi-site quote. The MS Quote Preview Item Wrapper workflow calls this workflow.

Figure 15 shows this workflow.

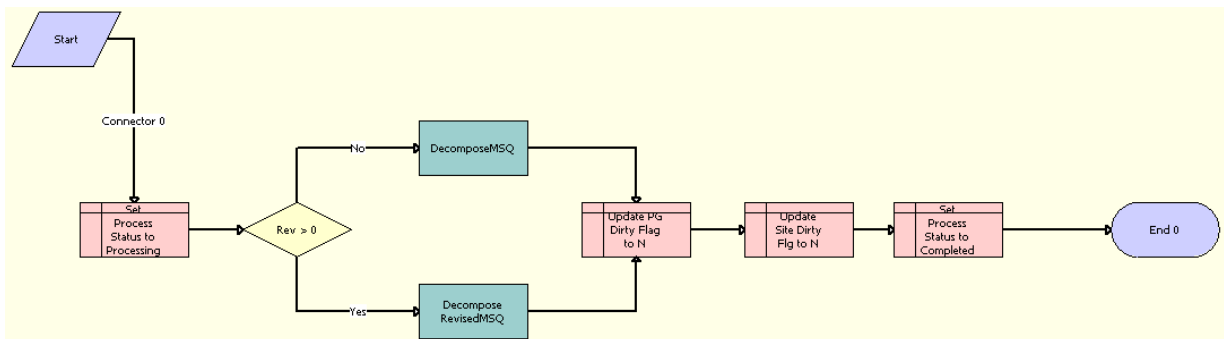


Figure 15. MS Quote Preview Item Process Workflow

**Workflow Description.** This workflow performs the following actions:

- 1 **Set Process Status to Processing.** This step updates the Process Status field to a value of Processing to notify the user that decomposition process started for the multi-site quote.
- 2 **Rev > 0.** This step determines whether the revision number for the multi-site quote is greater than 0.
- 3 **DecomposeMSQ.** This step calls the DecomposeMSQ method in the MSQ Service business service if the revision number is 0. This method uses the Cartesian product between the products and sites in each product group of the multi-site quote to generate the corresponding order line items.
- 4 **Decompose RevisedMSQ.** This step calls the Decompose RevisedMSQ method in the MSQ Service business service if the revision number is greater than 0. This method uses the Cartesian product between the products and sites in each product group of the multi-site quote to generate the corresponding order line items for any product updates, site updates, and billing account changes.
- 5 **Update PG Dirty Flag to N.** This step updates the Prod Grp Dirty Flag field to a value of N.
- 6 **Update Site Dirty Flg to N.** This step updates the Site Dirty Flag' field to a value of N.

- 7 Set Process Status to Completed.** This step updates the Process Status field to a value of Completed.

## Submit MS Quote WF Workflow

This workflow gets the multi-site quote in integration object format if a version of the multi-site quote revision was not submitted, validates the quote, and, if the quote is valid, calls the Submit MS Quote SubProcess workflow to execute the decomposition process for the quote. This workflow is called when you click the Submit Order button.

Figure 16 shows this workflow.

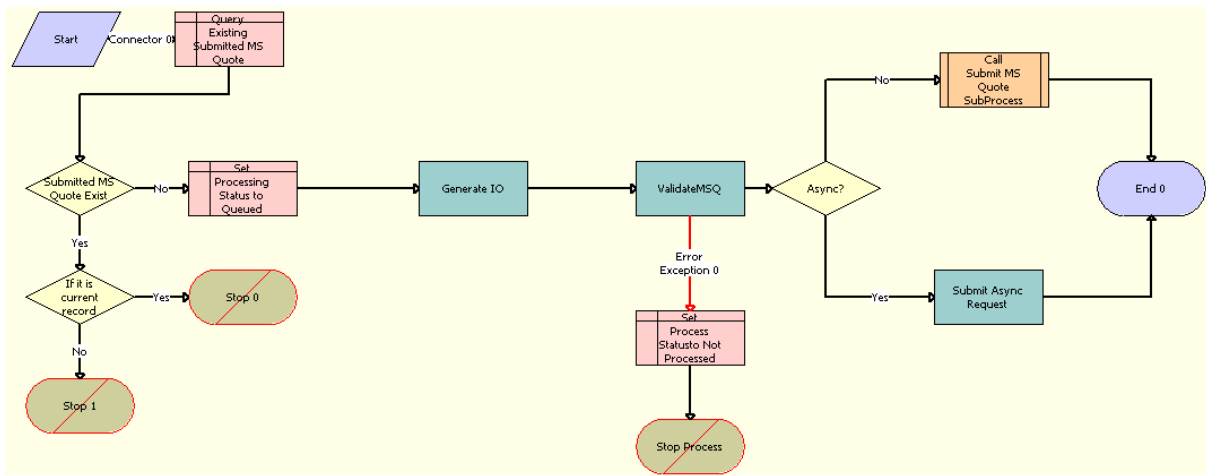


Figure 16. Submit MS Quote WF Workflow

**Workflow Description.** This workflow performs the following actions:

- 1 Query Existing Submitted MS Quote.** This step determines whether a version of the multi-site quote revision was submitted.
- 2 Submitted MS Quote Exist.** This step determines whether the previous step obtains at least one record.
- 3 If it is current record.** This step determines whether the submitted multi-site quote is actually the current record. If it is the current record, then an appropriate error message results. If it not the current record, then an error message with the details of the actual submitted multi-site quote results.
- 4 Set Processing Status to Queued.** This step updates the Process Status field to a value of Queued if [Step 1](#) does not obtain at least one record.
- 5 Generate IO.** This step queries the multi-site quote by using the SIS OM MS Quote integration object.

- 6 **ValidateMSQ.** This step calls the ValidateMSQ method in the MSQ Service business service to validate the input (MS Quote).
- 7 **Set Process Status to Not Processed.** This step processes any exception in the previous step, and updates the Process Status field to a value of Not Processed.
- 8 **Async?** This step uses the value in the Enable Multi Site Quote Async system preference to determine to execute the decomposition process in asynchronous mode or synchronous mode. If the system preference is TRUE, then the decomposition process is executed in asynchronous mode. If the system preference is FALSE, then the decomposition process is executed in synchronous mode.
- 9 **Call Submit MS Quote SubProcess.** This step calls the Submit MS Quote SubProcess workflow to execute the decomposition process in synchronous mode. For more information, see [“Submit MS Quote SubProcess Workflow” on page 167](#).
- 10 **Submit Async Request.** This step submits a server request to run the Submit MS Quote SubProcess workflow in asynchronous mode.

## Submit MS Quote SubProcess Workflow

This workflow executes the logic for the decomposition process and generates the order line items for the multi-site quote. The Submit MS Quote WF workflow calls this workflow.

Figure 17 shows this workflow.

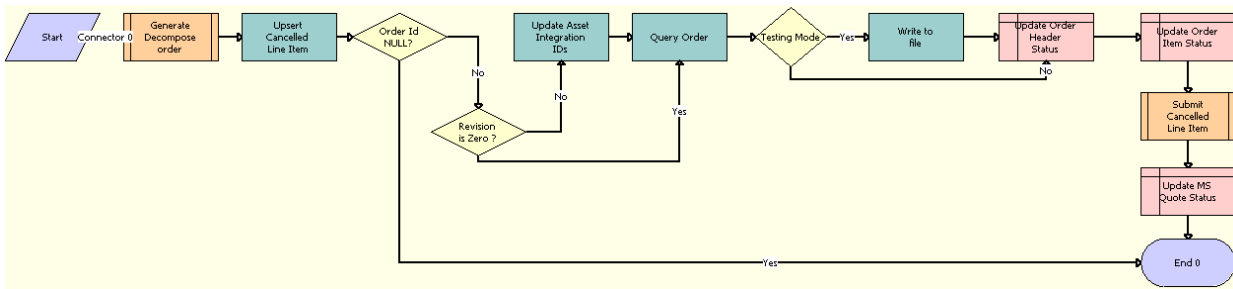


Figure 17. Submit MS Quote SubProcess Workflow

**Workflow Description.** This workflow performs the following actions:

- 1 **Generate Decompose order.** This step calls the MS Quote Preview Item Process workflow to generate the order line items for the multi-site quote. For more information, see [“MS Quote Preview Item Process Workflow” on page 165](#).
- 2 **Upsert Cancelled Line Item.** This step invalidates the cancelled product configurations, billing account transfers, and open order line items by updating the corresponding flags.
- 3 **Order Id NULL?** This step determines whether the Order Id field is null. If the Order ID field is not null, then the workflow continues.
- 4 **Revision is Zero?** This step determines whether the revision number is greater than 0.

- 5 **Update Asset Integration IDs.** This step updates the Asset Integration Id fields for each of the generated order line items when the revision number is greater than 0.
- 6 **Query Order.** This step queries for the order that is generated after the decomposition process.
- 7 **Testing Mode.** This step uses the Enable AIA Testing system preference to determine whether the testing mode applies.
- 8 **Write to file.** This step writes the generated order to an XML file when the testing mode applies.
- 9 **Update Order Header Status.** This step updates the Status field of the order header to a value of Open.
- 10 **Update Order Item Status.** This step updates the Status field of the order item to a value of Open.
- 11 **Submit Cancelled Line Item.** This step calls the MS Quote Submit Cancelled Line Item workflow to determine the order line items to be cancelled. For more information, see [“MS Quote Submit Cancelled Line Item Workflow” on page 168](#).
- 12 **Update MS Quote Status.** This step updates the Status field of the multi-site quote to a value of Order Placed.

## MS Quote Submit Cancelled Line Item Workflow

This workflow queries for the cancelled order line items from the decomposition process and submits these order line items to the order-provisioning system. The Submit MS Quote SubProcess workflow calls this workflow.

Figure 18 shows this workflow.

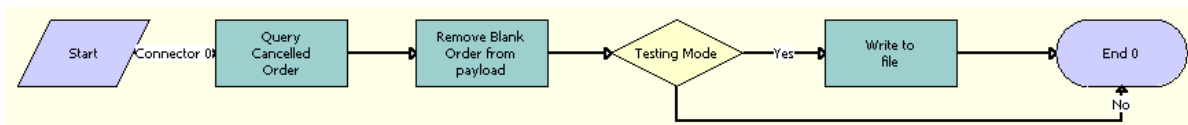


Figure 18. MS Quote Submit Cancelled Line Item Workflow

**Workflow Description.** This workflow performs the following actions:

- 1 **Query Cancelled Order.** This step queries for the order line items that are cancelled.
- 2 **Remove Blank Order from payload.** This step removes any blank orders that are obtained from the payload.
- 3 **Testing Mode.** This step uses the Enable AIA Testing system preference to determine whether the testing mode applies.
- 4 **Write to file.** This step writes the payload to an XML file when the testing mode applies.



## SIS OM Edit Delta MS Quote Line Item Workflow

This workflow processes product configurations for multi-site quotes. This workflow is called when you click the Customize button to configure the products for the services in a multi-site quote.

Figure 19 shows this workflow.

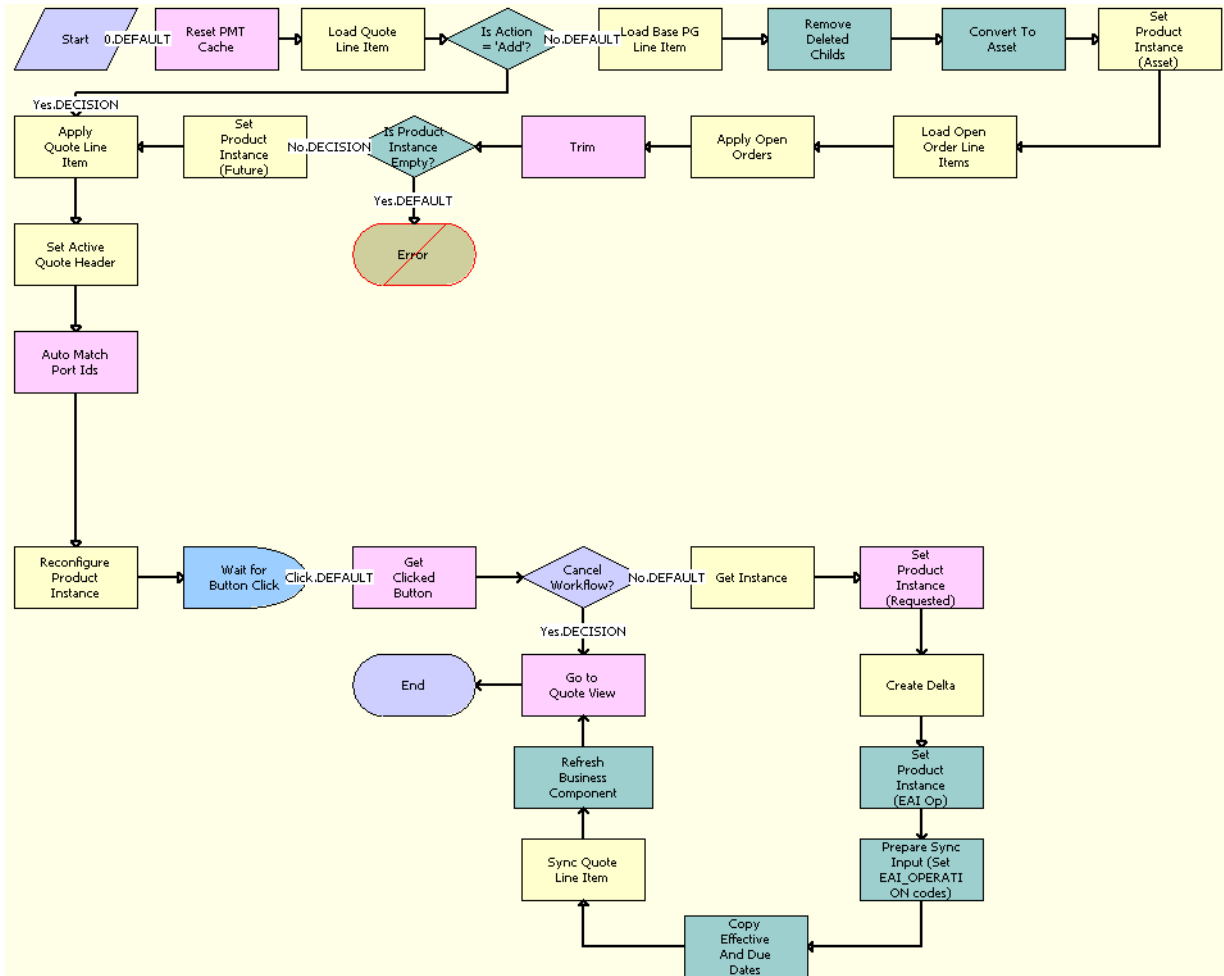


Figure 19. SIS OM Edit Delta MS Quote Line Item Workflow

**Workflow Description.** This workflow performs the following actions:

- 1 Reset PMT Cache.** This step resets the PMT cache that holds the product configurations.
- 2 Load Quote Line Item.** This step loads the configured product in the product group of the multi-site quote.
- 3 Is Action = 'Add'?** This step determines whether the Action field for the configured product is a value of Add.

- 4 Load Base PG Line Item.** This step loads the base product configuration when the Action field is not a value of Add. The modified product configuration is compared to the base product configuration.
- 5 Remove Deleted Childs.** This step removes the child products with a value of Delete in the Action field. These child products are not included in the configuration comparison.
- 6 Convert To Asset.** This step converts the base product configuration to an asset. The Delta method compares the modified product configuration to the base product configuration.
- 7 Set Product Instance (Asset).** This step sets the base product configuration in the PMT cache.
- 8 Load Open Order Line Items.** This step loads the open order line items by using the provided search specifications.
- 9 Apply Open Orders.** This step applies the open order items from the previous step.
- 10 Trim.** This step eliminates line items from a delta quote or delta order when they do not meet the requirements that are specified in the input arguments.
- 11 Is Product Instance Empty?** This step determines whether the outcome of [Step 9](#) is empty.
- 12 Set Product Instance (Future).** This step sets the requested product configuration in the PMT cache.
- 13 Apply Quote Line Item.** This step calls the PMT Service Apply method to convert the product to an asset. The Delta method compares the modified product configuration to the base product configuration.
- 14 Set Active Quote Header.** This step sets the header of the product group in the PMT Service.
- 15 Auto Match Port Ids.** This step calls the auto match functionality in the Siebel Configurator.
- 16 Reconfigure Product Instance.** This step opens the Siebel Configurator in an interactive mode.
- 17 Wait for Button Click.** This step waits for a button click in the Siebel Configurator.
- 18 Get Clicked Button.** This step determines the button that is clicked in the Siebel Configurator.
- 19 Cancel Workflow?** This step determines whether the Cancel button is clicked in the Siebel Configurator.
- 20 Get Instance.** This step gets the configured product instance from the Siebel Configurator.
- 21 Set Product Instance (Requested).** This step sets the product instance in the PMT cache.
- 22 Create Delta.** This step creates the difference between the base product configuration and modified product configuration.
- 23 Set Product Instance (EAI Op).** This step sets the EAI operation codes in the modified product configuration by using the output from the previous step.
- 24 Prepare Sync Input (Set EAI\_OPERATION codes).** This step prepares the modified product configuration to update the database.
- 25 Copy Effective And Due Dates.** This step copies the effective date and due date for the product to their original values before the configuration.
- 26 Sync Quote Line Item.** This step saves the modified product configuration in the database.

- 27 Refresh Business Component.** This step refreshes the MS Quote Product Group Items business component.
- 28 Go to Quote View.** This step navigates to the Product Groups view of the multi-site quote.



# 12 Price Comparison in Siebel Energy

This chapter describes the basic concepts behind the Price Comparison feature available in Siebel Energy. It explains procedures for setting up rate plans, generating annual costs for those plans, and viewing costs comparing competitors' rates with in-house rates. It includes the following topics:

- ["About Price Comparison in Siebel Energy"](#)
- ["Rate Plans with Tier-Based Pricing" on page 174](#)
- ["Scenarios for Using Price Comparison in Siebel Energy" on page 178](#)
- ["Process of Setting Up Price Comparison" on page 180](#)
- ["Running Reports in Siebel Energy" on page 186](#)
- ["Accessing Price Comparisons \(End User\)" on page 187](#)
- ["Generating a Price Comparison \(End User\)" on page 187](#)
- ["Enrolling a Customer for a Service in Siebel Energy \(End User\)" on page 188](#)

## About Price Comparison in Siebel Energy

The Price Comparison feature available in Siebel Energy 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.

The following list provides an overview of the steps involved with the Price Comparison feature:

- 1 The Price Comparison feature is accessed in one of the following methods:
  - From a Web site, a customer or prospective customer requests a list of comparative rates for services. The entry point is through Siebel eSales.
  - A customer service representative (CSR) creates an opportunity in Siebel Energy and selects the Price Comparison feature.
- 2 A SmartScript session begins to collect customers' answers to a series of questions regarding their current services and rates.
- 3 At the end of the SmartScript session, the Price Comparison feature converts this customer-provided information into an annual cost.

The annual cost is used to determine the customer's usage by using the competitor's rate plan information. For a more detailed explanation, see [Appendix A, "Technical Reference for the Price Comparison Feature"](#).

- 4 The Price Comparison feature finds in-house rate plans that match the attributes of the competitor's rate plan.

- 5 The Price Comparison feature calculates the projected annual cost for each matching rate plan by using the usage from [Step 3](#) and displays the quotes.
- 6 If the CSR is running the Price Comparison feature, then the CSR can choose to mail, email or fax a copy of the displayed quotes to the prospect.
- 7 The customer selects a rate plan and begins the enrollment process.
- 8 The next step depends on which application was used to begin the price comparison process:
  - If the process began through Siebel eSales, then new customers must log in and register. Customers who already have products in their shopping cart can add the rate plan to their shopping cart.
  - If the process began through Siebel Energy, then the CSR provides the necessary account information for new customers. For accounts already associated with the opportunity, the information is automatically filled in.
- 9 The typical order workflow provisions the order.

Administrators, such as pricing managers or call center administrators, benefit from reading this chapter. Pricing managers learn how to set up rate plans and run reports. Other administrators or managers see how customer service representatives (end users) use the Price Comparison feature. After becoming familiar with the end-user procedures, administrators can customize the software to fit their company's needs.

The Price Comparison feature calls workflows, methods, and processes, which form the background logic for the feature. For detailed information about the business services and workflows for price comparison, and for technical information about the background logic of the price comparison functionality, see [Appendix A, "Technical Reference for the Price Comparison Feature"](#).

### Related Books

*Siebel Product Administration Guide*

*Siebel Pricing Administration Guide*

*Siebel Order Management Guide*

*Siebel Order Management Guide Addendum for Communications*

## Rate Plans with Tier-Based Pricing

Rate plans in Siebel Energy can accommodate complex product bundles and pricing schemes. Administrators set up root products with the usage products as subcomponents. Each product must have a Service Type field value, such as Electricity or Gas, to limit the price comparison to the correct product category.

Administrators can set up rate plans to reflect variations in service, region, time of the day (for example, day, night, or weekends), time of the year (for example, summer or winter), payment methods, payment duration, credit risk, and so on. The administrator can extend this list by adding attributes to the appropriate product class.

Pricing managers set up utility rate plans. These rate plans can cover electricity, gas, or dual fuel, and so on, with a standing charge or with no standing charge. Different combinations of attributes give rise to different rates within the same rate plan. These complex rate plans are usually maintained in external billing and pricing applications. The rate plans are matched up with the actual consumer usage when the external application generates a utilities bill. The following topics show examples of rate plans for various energy products:

- [Electrical Service Rate Plans on page 175](#)
- [Gas Service Rate Plans on page 177](#)

### Electrical Service Rate Plans

Table 14 describes sample electrical service rate plans. In the table, the tier numbers are kilowatt hours (KWh), and the pricing values are the costs for each kilowatt hour. The class is Electricity.

Table 14. Electrical Rate Plan Examples

Root Product	Subcomponent	Tier Numbers and Pricing Values	Tier Attributes and Values	List Price
Electric StandardWith StandingCharge	(See the following cells.)	(See the following cells.)	(See the following cells.)	15.00 for each month
	StandardWith StandingCharge Usage	1 thru 1000 - 0.12 1001 thru 2000 - 0.00 Above 2000 - 0.00	Region - North MeterType - Credit PaymentType - Automatic Debit Usage Type - Threshold	0
		1 thru 1000 - 0.10 1001 thru 2000 - 0.08 Above 2000 - 0.05	Region - North MeterType - Credit PaymentType - Automatic Debit Usage Type - Peak	0
		1 thru 1000 - 0.08 1001 thru 2000 - 0.05 Above 2000 - 0.03	Region - North MeterType - Credit PaymentType - Automatic Debit Usage Type - Off Peak	0

Table 14. Electrical Rate Plan Examples

Root Product	Subcomponent	Tier Numbers and Pricing Values	Tier Attributes and Values	List Price
Electric StandardWithNo StandingCharge	(See the following cells.)	(See the following cells.)	(See the following cells.)	0 for each month
	StandardWithNo StandingCharge Usage	1 thru 1000 - 0.12 1001 thru 2000 - 0.00 Above 2000 - 0.00	Region - North MeterType - Credit PaymentType - Automatic Debit Usage Type - Threshold	0
		1 thru 1000 - 0.10 1001 thru 2000 - 0.08 Above 2000 - 0.05	Region - North MeterType - Credit PaymentType - Automatic Debit Usage Type - Peak	0
		1 thru 1000 - 0.08 1001 thru 2000 - 0.05 Above 2000 - 0.03	Region - North MeterType - Credit PaymentType - Automatic Debit Usage Type - Off Peak	0



## Gas Service Rate Plans

Table 15 describes sample gas service rate plans. In the table, the tier numbers are therms, and the pricing values are the costs for each therm. The class is Gas.

Table 15. Gas Rate Plan Examples

Root Product	Subcomponent	Tier Numbers and Pricing Values	Tier Attributes and Values	List Price
GasWith StandingCharge	(See the following cells.)	(See the following cells.)	(See the following cells.)	10.00 for each month
	GasWith StandingCharge Usage	1 thru 1000 - 0.12 1001 thru 2000 - 0.00 Above 2000 - 0.00	Region - North MeterType - Credit PaymentType - Automatic Debit Usage Type - Threshold	0
		1 thru 1000 - 0.10 1001 thru 2000 - 0.08 Above 2000 - 0.05	Region - North MeterType - Credit PaymentType - Automatic Debit Usage Type - Peak	0
		1 thru 1000 - 0.08 1001 thru 2000 - 0.05 Above 2000 - 0.03	Region - North MeterType - Credit PaymentType - Automatic Debit Usage Type - Off Peak	0

Table 15. Gas Rate Plan Examples

Root Product	Subcomponent	Tier Numbers and Pricing Values	Tier Attributes and Values	List Price
GasWithNo StandingCharge	(See the following cells.)	(See the following cells.)	(See the following cells.)	0 for each month
	GasWithNo StandingCharge Usage	1 thru 1000 - 0.12 1001 thru 2000 - 0.00 Above 2000 - 0.00	Region - North MeterType - Credit PaymentType - Automatic Debit Usage Type - Threshold	0
		1 thru 1000 - 0.10 1001 thru 2000 - 0.08 Above 2000 - 0.05	Region - North MeterType - Credit PaymentType - Automatic Debit Usage Type - Peak	0
		1 thru 1000 - 0.08 1001 thru 2000 - 0.05 Above 2000 - 0.03	Region - North MeterType - Credit PaymentType - Automatic Debit Usage Type - Off Peak	0

## Scenarios for Using Price Comparison in Siebel Energy

This topic gives the following example of how price comparison might be used. You might use price comparison differently, depending on your business model. This topic includes the following scenarios:

- [“Setting Up Rate Plans” on page 179](#)
- [“Analyzing Rate Plans” on page 179](#)
- [“Comparing Prices and Enrolling Over the Web” on page 179](#)

## Setting Up Rate Plans

Your company's pricing manager creates a rate plan as a new customizable product and associates a class with it that defines its attributes. For this customizable product, she wants Payment Type to be the attribute of the parent rate plan so that the attribute is inherited by its subcomponents. She then creates another product as a subcomponent to represent the different usage types and associates it with the same class.

Next, the pricing manager sets up tier pricing for the class, specifying different tiered rates for different attribute combinations. She sets up a price list for her company and for each of the competitors. She adds both the root product and subcomponents as price list items. She associates the tier pricing with the subcomponents.

A month later, the pricing manager receives the latest publication of residential rates for a major competitor, so she updates her data with the most current information for each rate for that competitor.

Next, she realizes that the competitor has introduced a new rate plan into the market. Because her company does not have an equivalent rate, she creates a new rate product for the competitor's plan and adds it to the competitor's price list.

She can then also model the relevant pricing structure. When a customer service representative or a prospective customer chooses this rate, the comparison reports that there is no equivalent or like-for-like rate plans and returns only those rate plans that match the attributes of the competitor's product or service.

The next rate on her market intelligence gathering list is from a new competitor and therefore not in the database. She sets up a new price list for that competitor, and adds the existing equivalent rate products. She also notes that the rate is offered only within the city limits of Richardson, so she creates a rate structure for which the Region attribute has a value of Richardson.

## Analyzing Rate Plans

The pricing manager runs a report each month to compare her company's rates with other competitors in the service area. She needs to review the effectiveness of her company's rate plans, the introduction of competitors' rate plans, and the redesigning of new rate plans to capture the market share needed.

The pricing manager first runs a report that lists all the competitors, their rate plans, and the cents for each kWh for peak, off-peak, and weekend rates associated with each rate plan. This report gives her a good idea of the dynamics in the marketplace.

She next runs a report consolidating the customers' inputs, choices and decision, for every single time the pricing calculator was run for a given time period, displaying the region, service (gas, electric, or both), competitor, rate plan, savings, and if they switched to National Energy. This data assists her in measuring the effectiveness of her rate plans in customer acquisition.

## Comparing Prices and Enrolling Over the Web

An energy customer with service provided by a competing firm goes to a Web site to follow up on a price comparison ad he saw.

He is prompted to answer a series of questions. For the first question, he indicates that he wants to receive both gas and electricity service from this company. For his electricity service provider, he selects from a drop-down list that is specific to his region. That action triggers another drop-down list to appear from which he specifies his current service tariff or rate.

Looking at his most recent bill, he enters his quarterly costs. Since he has chosen gas and electric, he then answers similar questions concerning his gas service, and then clicks Finish.

Using the gathered information, the Price Comparison calculator generates his projected annual bill. For each of the company's rate plans, he also sees the savings by switching to the company.

He selects the rate plan that saves him the most money and then clicks the Enroll button. He is then brought to a view that has the proper orderable service entered as a line item. Because he is not an existing customer, he is required to go through new user registration before he can complete the transaction online.

## Process of Setting Up Price Comparison

To set up the price comparison feature, perform the following tasks:

- 1 ["Setting Up Products for Rate Plans" on page 180](#)
- 2 ["Setting Up Price Lists for Rate Plans" on page 183](#)
- 3 ["Setting Up Usage Profiles" on page 185](#)
- 4 ["Matching Competitors' Rate Plans with In-House Rate Plans" on page 185](#)

For information about rate plan examples, see ["Rate Plans with Tier-Based Pricing" on page 174](#).

## Setting Up Products for Rate Plans

To set up products, administrators must first set up classes to be associated with the products. For rate plans, classes describe the type of service, such as Electricity or Standard Electric Services.

As part of defining classes, administrators create attributes, such as Meter Type, that get inherited by the products associated with that class. They also define the list of values available to the end user for each attribute of the class. After that, administrators create and define the root products that belong to the new class. To the root product, they add subcomponents, which are the usage products. For more information about classes and products, see *Siebel Product Administration Guide* and *Siebel Order Management Guide Addendum for Communications*.

This task is a step in ["Process of Setting Up Price Comparison" on page 180](#).

## Attributes of Class Administration

Before proceeding with the procedures in this topic, review this background information about the attributes of class administration.

In general, Siebel applications have the following two categories of List of Values (LOVs):

- One type is used for setting up Dynamic Attributes, described as part of the procedures in this topic.
- One type is used elsewhere in the application, including in the Price Comparison SmartScript.

Therefore, if you follow the procedure in this topic to set up a dynamic attribute in Class Administration for use in Price Comparison, then you might want to do the following:

- Associate a List of Values to each dynamic attribute.
- Make the LOVs represent the possible answers to a corresponding question about customer's billing details in the Price Comparison SmartScript.

Because of the different categories of LOVs in Siebel applications, you must set up two different LOV types with the same set of values. The first one you set up in Class Administration, while the other one you set up in the regular LOV administration. For more information, see *Siebel Applications Administration Guide*.

Siebel Energy is set up with the LOV types and values for two dynamic attributes: Meter Type and Payment Method. The corresponding LOV types used in the Price Comparison SmartScript are UT\_METER\_TYPE and PAYMENT\_METHOD.

In addition, for Region and Usage Type, you do not have to set up the regular LOVs because Region does not use LOVs (it uses a special BusComp to hold the possible values), and Usage Type does not appear in the SmartScript questions at all.

## Setting Up Classes for Rate Plans

To set up classes for rate plans, follow this procedure.

**NOTE:** Special considerations apply when setting up dynamic attributes for use in the Price Comparison feature. Make sure you set up the dynamic attributes correctly. For more information, see ["Attributes of Class Administration" on page 180](#).

### *To set up classes for rate plans*

- 1 Navigate to the Administration - Application screen, then the Class Administration view.
- 2 In the Classes list, add a record.  
Typical class names are Electric Service, Gas Service, and Standard Electric Service.
- 3 Click the Dynamic Attributes view tab.
- 4 In the Dynamic Attributes list, add a record, and complete the following steps:
  - a In the LOV Type field, click the select button.
  - b In the Pick List of Values Type dialog box, select an existing type or add a record for a new LOV type.
  - c In the Dynamic Attributes list, drill down on the LOV type of the attribute.
  - d In the List of Values - Type list, add a record for each value that an end user can select for that LOV type.

- 5 Repeat [Step 4](#) for each attribute you want to include.

Typical examples include Meter Type, Payment Method, Region, and Usage Type.

### Creating Root Products for Rate Plans

To create root products for rate plans, follow this procedure

#### *To create root products for rate plans*

- 1 Navigate to the Administration - Product screen, then the Products view.
- 2 Add a record, and complete the necessary fields in the record and the form. To access more fields, click the show more button in the form.

Some fields are described in the following table.

Field	Comments
Type	Select Service for the type of product.
Service Type	Select the service type, such as Electricity or Gas.
Product Class	Select the class that you created for the service.
Price Type	Select the price type, such as Recurring (recommended for root products).
UoM	Select the unit of measurement. Per Month is the only unit of measurement supported for the standing charge.

### Creating Usage Products

You must create the usage products before you can add them as subcomponents.

#### *To create usage products*

- Follow the procedure for creating root products for rate plans with the following differences:
  - a For Price Type, select Usage.
  - b For UoM, select the appropriate unit of measurement, such as kWh.

### Setting Up Usage Products

To set up usage products, follow this procedure.

#### *To set up usage products*

- 1 Navigate to the Administration - Product screen, then the Products view.
- 2 Drill down on the name of the root product.

- 3 Click the Customizable Product view tab.  
The Product form appears with the Lock/Unlock Product list and Versions list beneath it.
- 4 In the Lock/Unlock Product list, click the menu button and select Create Workspace.
- 5 In the Lock/Unlock Product list, select Locked Flag.
- 6 From the Show drop-down list (beneath the Product form), select Product Designer.
- 7 In the Product Designer list, add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Default	Type the default number of instances of the product. Typically, this number is the same as the maximum number.
Maximum	Type the maximum number of allowed instances of the product. This number must equal the number of usage types. For example, if rates for usage are peak, off peak, and threshold, then set the maximum number to 3.
Minimum	Type the minimum number of allowed instances of the product.
Product	Select an existing usage product.

- 8 From the lower Show drop-down list, select Product Versions.
- 9 In the Lock/Unlock Product list, click the menu button and select Refresh Workspace.
- 10 Click Release New Version.

## Setting Up Price Lists for Rate Plans

For rate plans, administrators use attribute-based pricing and tier-based pricing to give each variation of the master rate plan a rate. Therefore, administrators must first set up tier-based pricing and then set up price lists for the products.

This task is a step in [“Process of Setting Up Price Comparison”](#) on page 180.

### Setting Up Tier-Based Pricing

To set up tier-based pricing, follow this procedure.

#### *To set up tier-based pricing*

- 1 Navigate to the Administration - Product screen.

- 2 In the More Info form, add a record, and complete the necessary fields.  
Some fields are described in the following table.

Field	Comments
Class	Select a class associated with the rate plan and usage products.
Type	Select Multiple Attributes.
Default Starting Adjustment Type	Select Tier Based.

- 3 Click the Attributes view tab.
- 4 In the Attributes list, add a record for each attribute that you want to affect the price.
- 5 Click the Adjustment Item Generator view tab, and complete the following steps:
  - a In the Adjustment Item Generator list, select the first attribute.
  - b In the Item Generator list, check all values that you want to affect the pricing.
  - c Repeat [Step a](#) and [Step b](#) for all attributes.
- 6 Click Generate, and complete the following steps:
  - a In the Items list, select an attribute combination.
  - b Click the select button in the Tier Price field, and add a record in the Tier Price dialog box for each tier.
 

**NOTE:** The minimum quantity of the first tier must be 1. Tiers must not overlap and there must be no gaps between tiers. A maximum quantity is not required for the last tier.
  - c Repeat [Step a](#) and [Step b](#) for each attribute combination.
- 7 Repeat this procedure until you create as many tier pricing items you need.

## Setting Up Price Lists for Products

To set up price lists for products, follow this procedure.

### *To set up price lists for products*

- 1 Navigate to the Administration - Pricing screen, then the Price Lists view.
- 2 Add a record for the price list.
- 3 For the Type field, select PC INHOUSE PRICE LIST or PC COMPETITOR PRICE LIST.
- 4 Drill down on the name of the price list.
- 5 Click the Price List Line Items view tab.
- 6 In the Price List Items list, add a record for each product (root product and usage subcomponent).



- 7 For each subcomponent product, select the appropriate tiered pricing in the Attribute Pricing field.
- 8 In the List Price field, enter the standing charge as the list price of the root product.

## Setting Up Usage Profiles

Administrators must set up the usage information that the price comparison feature uses to determine annual costs. This information includes data about the regions and multipliers to take into account for seasons when converting bills into annual costs.

This task is a step in [“Process of Setting Up Price Comparison” on page 180](#).

### *To set up a usage profile*

- 1 Navigate to the Product Comparison screen, then the PC Usage Profile view.
- 2 In the PC Usage Profile list, add a record for the region, and complete the necessary fields. Add the region that you entered as a list of values for the region attribute of that class.

Some fields are described in the following table.

Field	Comments
On Peak Usage	Type a number that represents the proportion of usage that is during peak hours for a typical customer in the region. The number must be decimal value less than 1 (for example, 0.3).
Off Peak Usage	Type a number that represents the proportion of usage that is during off peak hours for a typical customer in the region. The number must be decimal value less than 1 (for example, 0.7).
Summer Multiplier	Type a number for the multiplier to use to convert a quarterly bill amount into an annual amount for a typical customer in the region (for example, 5).
Winter Multiplier	Type a number for the multiplier to use to convert a quarterly bill amount into an annual amount for a typical customer in the region (for example, 3)

## Matching Competitors’ Rate Plans with In-House Rate Plans

Administrators specify the rate plans to compare with each other to produce like-for-like quotes.

This task is a step in [“Process of Setting Up Price Comparison” on page 180](#).

*To match competitors' rate plans with in-house rate plans*

- 1 Navigate to the Product Comparison screen, then the Relationships view.
- 2 In the Competitor Product field, select a competitor's rate plan.
- 3 In the Orderable Product field, select the in-house rate plan that is the equivalent of the competitor's rate plan.

## Running Reports in Siebel Energy

The Price Comparison feature provides the following two reports, which are both used only by administrators:

■ The Price Comparison Administrative Report

This report displays the competitor's name; the equivalent rate plan; the pricing at each tier for that rate plan; the day, night and weekend pricing for that rate plan; the projected annual bill for that rate plan; and the difference in price between the in-house and the competitor's rate plan.

When the report is run, the report returns the price comparison data matching the requirements set in the Price Comparison Admin Reports parameters view.

■ The Competitive Pricing Report

This report displays the competitor's name, equivalent rate plan, projected annual bill and the difference in cost between the in-house and the competitor's rate plan.

### Running the Price Comparison Report

To run the Price Comparison report, follow this procedure.

*To run the Price Comparison Administrative Report*

- 1 Navigate to the Product Comparison screen.
- 2 In the toolbar, click the Reports icon.  
The Run Report pane appears.
- 3 In the Run Report pane, complete the appropriate fields.

Some fields are described in the following table.

Field	Description
Report Name	Select EPC Administrative Report. The available reports apply to the screen and view to which you navigate.
Output Type	Select the output type for the report.
Report Locale	Select the locale for the report.

- 4 In the EPC Admin Parameters dialog box, set the constraints for the report, and click Finish.  
If you do not set constraints, then the report includes all the data.
- 5 Click Submit.  
The report runs.
- 6 Click My Reports to navigate to the Reports view of the BI Publisher Reports screen.  
A record for the run report appears in the Reports view.
- 7 Drill down on the Report Name field in the Reports view to display the report in a new window.  
You can print the report by using the print feature for the application in which it appears.

## Running the Competitive Pricing Report

To run the Competitive Pricing report, follow this procedure.

### *To run the Competitive Pricing report*

- 1 Navigate to the Product Comparison screen, then the Relationships view.
- 2 Click CP Report.

The SmartScript session used with the Price Comparison feature begins. However, to run the report, you do not have to supply answers for the region, supplier, or rate plan. If you do not answer these questions, then the report is generated for all regions, suppliers and rate plans.

- 3 At the end of the SmartScript session, click Finish.

Siebel Energy generates the report data as a background task. An email notification is sent to the user when the report is generated.

## Accessing Price Comparisons (End User)

The Price Comparison feature can be made available through the following applications:

- Siebel Energy allows end users, usually customer service representatives at a call center, to access the Price Comparison feature through the Opportunities screen. For more information, see [“Generating a Price Comparison \(End User\)” on page 187](#).
- Siebel eSales allows prospective or existing customers to access the Price Comparison feature over the Web. For more information, see *Siebel eSales Administration Guide*.

## Generating a Price Comparison (End User)

End users can collect billing information for an existing service, such as gas or electricity. Siebel Energy converts this data into an annual cost, which it can then compare against internal rates.

***To generate a price comparison for a customer***

- 1 Navigate to the Opportunities screen, then the Opportunities List view.
- 2 Select an existing record, or add a new record, and complete the necessary fields.  
For more information about creating opportunities, see [Chapter 10, “Opportunities in Siebel Energy.”](#)
- 3 Drill down on the name of the opportunity.
- 4 Click the Price Comparison view tab.
- 5 In the Price Comparison list, click New.  
A SmartScript session is launched with a series of questions to answer.
- 6 Click Next until you answer all the questions, and then click Finish.  
The Price Comparison view of the Opportunities screen appears. Some fields are described in the following table.

Field	Comments
Attribute Values	Displays the attributes and values for the product.
Equivalent Rate	Displays a rate if a like-for-like rate plan was found.
Projected Bill	Displays the annual cost calculated from the data provided.
Annual Savings	Displays the amount the customer can save by switching to your company’s rate plan.

## Enrolling a Customer for a Service in Siebel Energy (End User)

End users can enroll customers in a service offered by their company.

***To enroll a customer for a service***

- 1 Navigate to the Opportunities screen, then the Opportunities List view.
- 2 Drill down on the name of the opportunity.
- 3 Click the Price Comparison view tab.
- 4 In the Price Comparison list, select a price comparison record or generate a new price comparison record.  
For more information, see [“Generating a Price Comparison \(End User\)” on page 187.](#)
- 5 Click Enroll.  
For an existing customer, Siebel Energy creates an order. For a new customer, the CSR can create an account before the order is created. For more information about the ordering process, see *Siebel Order Management Guide Addendum for Communications.*

# 13 Billing in Siebel Energy

This chapter describes the procedures for handling customer inquiries about their invoices. It includes the following topics:

- [“About Billing in Siebel Energy” on page 189](#)
- [“Scenario for Using Billing in Siebel Energy” on page 190](#)
- [“Generating Credit, Fraud, and Usage Information in Siebel Energy” on page 192](#)
- [“Setting Up the Invoice Image Feature in Siebel Energy” on page 192](#)
- [“Entering Bank Information in Siebel Energy” on page 195](#)
- [“About Accessing or Updating Billing Information in Siebel Energy” on page 195](#)
- [“Process of Accessing or Updating Billing Information in Siebel Energy \(End User\)” on page 197](#)
- [“Process of Entering Payment Against an Outstanding Balance in Siebel Energy \(End User\)” on page 200](#)
- [“Viewing Usage Details in Siebel Energy \(End User\)” on page 203](#)
- [“Viewing Unbilled Charges in Siebel Energy \(End User\)” on page 204](#)
- [“Process of Creating Adjustments in Siebel Energy \(End User\)” on page 205](#)
- [“Process of Making Payment Arrangements in Siebel Energy \(End User\)” on page 208](#)
- [“Requesting a Duplicate Invoice in Siebel Energy \(End User\)” on page 210](#)
- [“Updating a Billing Profile in Siebel Energy \(End User\)” on page 211](#)
- [“Additional End-User Tasks for Billing Management” on page 211](#)

## About Billing in Siebel Energy

The procedures described in this chapter are usually performed by customer service representatives (CSRs). Using Siebel Energy, CSRs can retrieve past invoices, current unbilled charges, and other invoice details. CSRs can also arrange payment plans, record payments against an outstanding balance, or request adjustments to the customer’s records in the event of an incorrect bill.

Administrators involved with billing benefit from reading this chapter. It describes how your CSRs access billing information and update billing accounts. After becoming familiar with the end-user procedures, you can customize the software to fit your company’s needs.

Billing processes are integrated with an external billing application that Siebel Energy accesses to retrieve information, such as the customer’s last statement. That information is stored temporarily in Siebel database tables.

Performance of the billing screens depends on both the configuration and speed of retrieval from the external billing application. Configurators can set up Siebel Energy so that all messages are sent and received from the back-office application in real-time or batch mode. The results of these messages can also be stored in Siebel Energy database tables, allowing CSRs to resolve them in real-time.

Your company is responsible for performing the integration of Siebel Energy with billing applications. For more information, see *Overview: Siebel Enterprise Application Integration*. For information about setting up profiles that are used to run credit ratings, record billing preferences, or store tax exemption information, see [“Profiles in Siebel Energy” on page 53](#).

## Scenario for Using Billing in Siebel Energy

This topic gives one example of how billing might be used. You might use billing differently, depending on your business model.

A CSR at an energy provider receives a call from a business customer. The customer has just received his company's December invoice for electric service and believes that his company was overcharged for monthly usage.

The CSR verifies the caller's identity and then accesses the customer's billing information, primarily maintained in an external billing application. With the Siebel application, the CSR can access billing information as if it were stored locally.

The CSR finds the December invoice at the top of the customer's invoice list. She brings up an image of the invoice and notices that the customer has been charged \$300 for off-peak demand.

The CSR wants to review the electric usage and demand history to confirm the company used this much power. She first retrieves the customer's usage information for the December billing period. She then analyzes the usage and informs the customer that a demand spike occurred on December 20. She also checks to see the other invoices for previous months to determine whether this demand spike is consistent. It is not. The customer realizes that December 20 was the day of his company's holiday party and this party was the cause of the excess usage.

The customer asks to check his usage for the current month to make sure there are no unexpected surprises in the next month's invoice. The CSR reviews the unbilled charges and reports that there is no unusual usage.

While looking at the invoice details, however, she notices that the customer is being charged a city tax, from which his company is exempt. The customer has been paying this amount for the last few months. To reimburse him for the error, she can enter an adjustment request against either the entire invoice or specifically against a line item in that invoice. She decides to associate the request with the invoice line item in this case.

She enters the amount of the tax and explains the reason for the request. She then submits the adjustment for processing by the external billing application. If it is accepted, then this adjustment amount is credited immediately to the balance of the account of the customer and is printed on the customer's next invoice.

Before she forgets, she accesses the customer's exemption profile and makes a note that he is exempt from city tax, so that he is not incorrectly charged in the future.

The customer also wants to pay his outstanding balance. The CSR finds the most recent invoice, which is for the month of January. She creates a payment against the invoice, enters the customer's credit card information, and submits the payment for processing by the external billing application.

Before hanging up, the customer has one last request. He wants to start receiving invoices by email. The CSR goes to his billing profile, selects the appropriate Bill Media, and enters his email address. The customer thanks him for his time and hangs up.

After lunch, the CSR receives a phone call from another customer, who needs to arrange a payment plan. His recent invoice was considerably higher than normal, so he wants to spread out the payment over the next three months. After the CSR verifies that his credit is still good, she enters the payment arrangement request and notes the special circumstances. The external billing application processes the request and approves it in a few moments. The CSR informs the customer that his request has been accepted and that he can see that additional amount in the next three invoices.

Figure 20 summarizes the sequence of procedures an end user might use to update billing information in Siebel Energy:

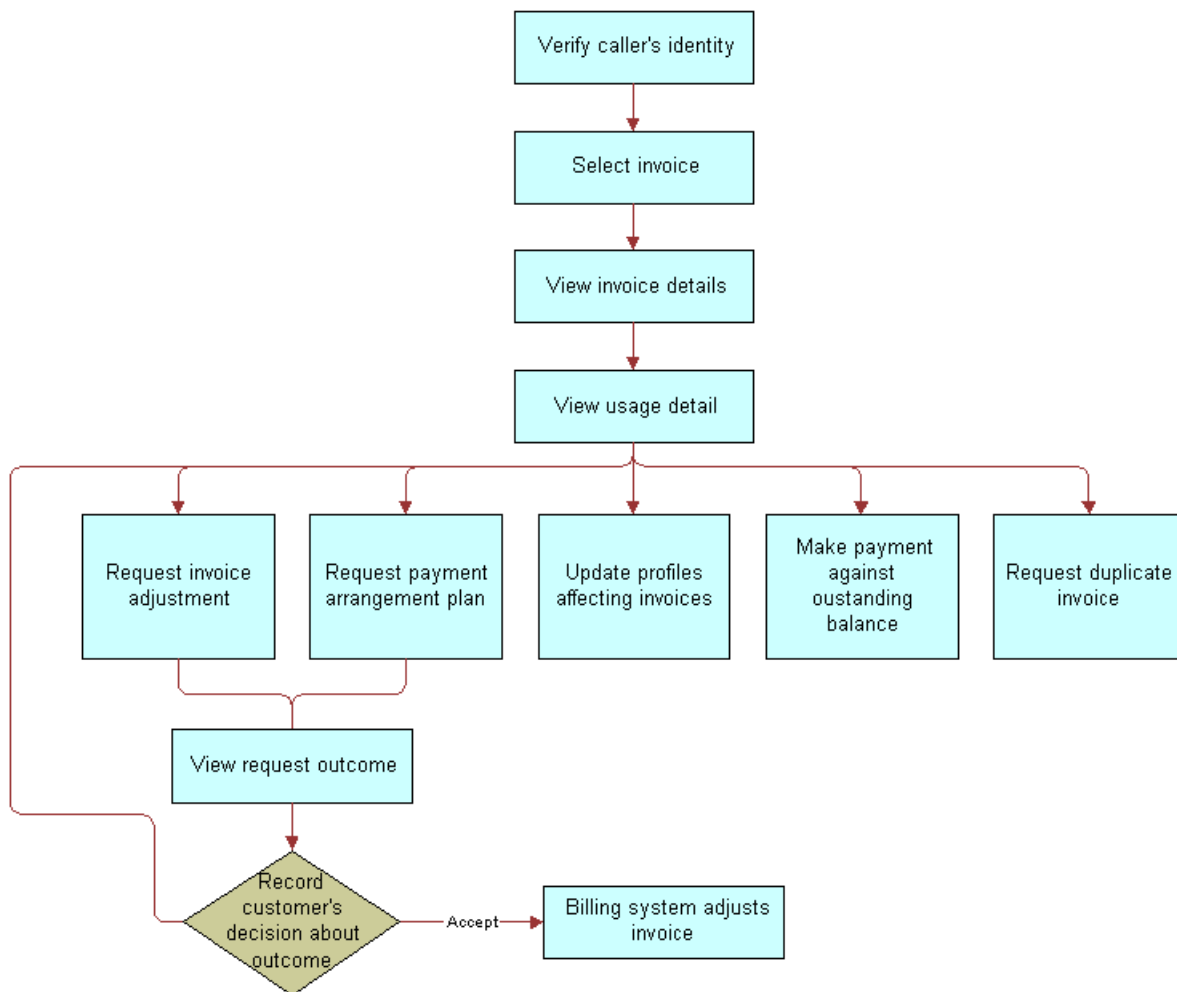


Figure 20. Example of Sequence for Billing

## Generating Credit, Fraud, and Usage Information in Siebel Energy

Siebel Energy contains a view for administrators that simulates an external billing application. From that view, you can create credit, fraud, and usage details for a billing account. End users do not have access to the view.

**CAUTION:** Siebel Energy billing administration views are part of the Billing Management option. Exclusively for *testing purposes*, these views are used to simulate an external billing application and therefore must not be used in a production environment. For this reason, they are not part of release documentation.

### *To generate credit, fraud, and usage information*

- 1 Navigate to the Billing Data Administration screen, then the Billing view.
- 2 In the Billing Accounts list, drill down on the name of the account.
- 3 Click the Credit Alerts, Fraud Alerts, or Usage Detail view tabs.
- 4 In the appropriate list, add a record, and complete the necessary fields.

**NOTE:** For Load Factor field in the Usage Detail view, you must enter the value as a percentage and *not* as a decimal value (multiply the value for used kWh or for available kWh by 100%). For example, if you normally enter .50 as a load factor, then enter 50 to make sure that the data appears properly throughout Siebel Energy.

## Setting Up the Invoice Image Feature in Siebel Energy

In the Siebel application, end users can view the image of a customer's bill from the external billing application, if the administrator sets up this feature.

### Bill Statement Host

When end users click the Invoice Image view tab of the Invoices screen, the invoice image that appears comes from the Bill Statement host. This image is not stored in the Siebel application. Complete the procedure in this topic to set up the integration between the Bill Statement host and the Siebel application.

### *To configure the integration with the Bill Statement host*

- 1 Navigate to the Administration - Integration screen, then the WI Symbolic URL List view.
- 2 In the Host Administration list, select the host with a value of BillStatementHost in the Virtual Name field.
- 3 In the Name field for this host, enter the name of your invoice host.
- 4 From the Show drop-down list, select Symbolic URL Administration.



5 In the Symbolic URL list, complete the following steps:

a Select the record with a value of BillStatement in the Name field.

**NOTE:** BillStatement is the name of the control defined in Siebel Tools. For more information, see *Using Siebel Tools*.

b For this record, complete the fields in the following table.

Field	Comments
URL	Type the URL in which the bill image appears.
Host Name	Select the name of the invoice host that you enter in <a href="#">Step 3</a> .
Fixup Name	Select the fix up name. A value of InsideApplet displays the image in the current applet. A value of OutsideApplication displays the image in a new pop-up window.

6 Restart the application.

The invoice image is now obtained from the Bill Statement URL.

## Web Center Content Host

When end users click the View Invoice button in the Bills view tab of the Billing Profile screen, the invoice image that appears comes from the Web Center Content (WCC) host. This image is not stored in the Siebel application. Complete the procedure in this topic to set up the integration between the WCC host and the Siebel application.

### *To configure the integration with the Web Center Content host*

1 Navigate to the Administration - Integration screen, then the WI Symbolic URL List view.

2 In the Host Administration list, select the host with a value of wccserver in the Virtual Name field.

3 In the Name field for this host, enter the name of your invoice host.

4 From the Show drop-down list, select Symbolic URL Administration.

5 In the Symbolic URL list, complete the following steps:

a Select the record with a value of WCC Invoice Popup Applet in the Name field.

**NOTE:** WCC Invoice Popup Applet is the name of the control defined in Siebel Tools. For more information, see *Using Siebel Tools*.

b For this record, complete the fields in the following table.

Field	Comments
URL	Type the URL in which the bill image appears.
Host Name	Select the name of the invoice host that you enter in <a href="#">Step 3</a> .

- c Change the values for the records in the Symbolic URL Arguments list to accommodate your WCC host.

For example, if the user ID and password for the WCC host are the same as the user ID and password for the Siebel application, then change the Argument Value field from UserLoginid to UserSiebelLoginid for the record with a value of j\_username in the Name field, and change the Argument Value field from UserLoginPassword to UserSiebelLoginPassword for the record with a value of j\_password in the Name field.

If the user ID and password for the WCC host are different from the user ID and password for the Siebel application, then complete [Step 6](#).

- d Repeat [Step a](#) through [Step c](#) for the record with a value of WCC Invoice Popup Applet\_Demo in the Name field.
- 6 If the user ID and password for the WCC host are different from the user ID and password for the Siebel application, then complete the following steps so that end users do not have to enter these credentials a second time:
- a Navigate to the Administration - Integration screen, then the SSO Systems Admin List view.
  - b In the SSO Systems Administration list, add a record, and complete the fields in the following table.

Field	Comments
System Name	Type WCC Invoice URL.
Symbolic URL Name	Select WCC Invoice Popup Applet or WCC Invoice Popup Applet_Demo.
Description	Type WCC URL Credentials

- c In the SSO System Users list, add a record, and complete the fields in the following table.

Field	Comments
Siebel Login Name	Select the user ID for the Siebel application.
Login Name	Type the WCC user ID.
Password	Type the WCC password.

- 7 Restart the application.

The invoice image is now obtained from the WCC URL.

## Entering Bank Information in Siebel Energy

A utility company might want to maintain a master list of verified, valid bank information and configure the Siebel application to display this bank information to users as a constrained list of values. This method can prevent users from capturing invalid Billing Profile information from customers.

A drop-down list of bank information in the Billing Profile displays the records that are entered in the Banks view of the Administration - Data screen. This topic describes how to enter the bank data manually.

**NOTE:** Alternatively, utility companies might maintain valid bank information externally and import the information into the Siebel application.

### *To enter bank information in Siebel Energy*

- 1 Navigate to the Administration - Data screen, then the Banks view.
- 2 Add a new record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Bank Name	Type the name of a bank in which customer funds are deposited.
Bank Routing Number	Type the routing number used for direct debit from the bank branch.
Bank Branch	Type a bank branch from which debits are withdrawn.

## About Accessing or Updating Billing Information in Siebel Energy

Siebel Energy allows end users to access the same invoice information through different views. By selecting one view or another, end users can find the information most relevant to them, according to the procedure they want to perform at that moment.

Most views allow end users to record interactions with a customer and to update the customer's information. The functionality available to end users depends on the end user access rights. From these views, end users can access information about billing, such as the account balance, invoice history, payment history, and adjustment history.

**NOTE:** The procedures described in this chapter contain the most frequently used method for performing each task, including the view to access, but other methods might exist.

### End-User Views

The end-user views follow:

- **Billing Portal view (call center agent).** The Billing Portal view summarizes the billing information that a call center agent most likely needs to review while talking to a customer. It also makes it easy for call center agents to handle the most common transactions associated with invoices.

The Billing Portal view serves as a starting point for most customer inquiries. Among other tasks, the Billing Portal views allow call center agents to complete the following tasks:

- Review the account status, such as the balance, delinquency information, and pending financial transactions (credit and debit) that have not yet been applied to the balance.
- View the most recent invoices of a customer and access detailed information about an invoice.
- View the history of payments and adjustments.

This history is useful if customers claim that they have already made a payment and that the balance is not correct.

- Access the usage history of different services that the customer has so that unexpected hikes can be explained to the customer.
- Begin transactions, such as recording payments or adjusting balances.

Table 16 describes the information available in the Billing Portal view.

Table 16. Billing Portal View

Views	Description
Account	Displays account information that corresponds to the Accounts screen, More Info view. End users can edit this information.
Account Balance	Displays balance information for the account. Retrieves this information from an external billing application. Information is read-only.  <b>Pay button.</b> Navigates to the Invoices screen, Payments view, in which a payment has been created to settle the entire account balance.  <b>Refresh button.</b> Updates the information with the most current data.
Invoice History	Displays information from the Invoices screen. Information is read-only.  <b>Invoice # hyperlink.</b> Navigates to the Invoices screen, Line Items view.
Payment History	Displays the payment history for the account. Information is read-only.  <b>Payment # hyperlink.</b> Navigates to the Invoices screen, Payments More Info view, Invoices subview, in which they record payments.

Table 16. Billing Portal View

Views	Description
Adjustment History	Displays a subset of the information from the Invoices screen, Adjustment Requests view. Information is read-only.  <b>Request # hyperlink.</b> Navigates to the Adjustment Requests view, Line Items subview.
Additional Info	<b>Billing Profile hyperlink.</b> Navigates to the Accounts screen, Profiles view, Billing Profile form.  <b>Usage Detail hyperlink.</b> Navigates to the Accounts More Info form, Usage Detail view.  <b>Unbilled Charges hyperlink.</b> Navigates to the Account More Info form, Unbilled Charges view.

- **Invoices views (call center agent).** The Invoices views allow call center agents to view all bill details. These views are generally accessed to reply to customer complaints regarding a specific charge on the bill. The Invoices views also allow call center agents to start transactions, such as adjusting an invoice, recording a payment against the invoice, requesting a bill duplicate.

### Time Zones in Date-Time Fields

The search functions of the Billing Profile views include Start Date and End Date fields, which are used to search the billing information using date range criteria. In these fields, end users can select a date and time, and can also select the time zone.

The Start Date and End Date fields of the Billing Profile screen are of UTC Date Time type, and send the values selected by users in UTC format (ISO Standard). The UTCCanonical user property, when set to Y, enables the feature that converts the date and time values to UTC format.

## Process of Accessing or Updating Billing Information in Siebel Energy (End User)

To find and display billing information, perform the following tasks:

- [“Accessing Billing Information” on page 197](#)
- [“Viewing Invoices” on page 198](#)

### Accessing Billing Information

To resolve customer inquiries, end users first find the billing account. In this account, they generally record payments. For most other transactions, end users record information at the invoice level.

End users can access the most recent invoice or retrieve past invoices. They can view invoice details, such as line items, after selecting the invoice. In addition, they can view the image of an already-sent invoice bill in HTML format.

**NOTE:** Some customers have a consolidated billing account for a number of service items. Siebel Energy allows end users to view charges associated with a billing account, service account, or parent account. For more information about accounts and subaccounts, see [Chapter 3, "Accounts in Siebel Energy."](#)

To access billing information through the Billing Portal view, follow this procedure.

This task is a step in ["Process of Accessing or Updating Billing Information in Siebel Energy \(End User\)" on page 197.](#)

### *To access the Billing Portal view*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the name of the account.
- 3 Click the Billing Portal view tab.

The Billing Portal view appears with several lists and forms summarizing the billing information for that account.

## Viewing Invoices

Use the procedures in this topic to access and view billing information in invoices.

This task is a step in ["Process of Accessing or Updating Billing Information in Siebel Energy \(End User\)" on page 197.](#)

### Accessing Invoice Views

To access billing information through the Invoices view, follow this procedure.

#### *To access the Invoice views*

- 1 Navigate to the Invoices screen.
- 2 In the Show drop-down list, select All External Invoices.

The Invoices list displays the bills that are generated by an external application. The information in the Invoices list (header information) is generally stored in the Siebel database. However, due to the large volume of data, it is not recommended that your company store the Invoice Line Item information in the Siebel database, but instead access that data in real time through integration.

**NOTE:** When you select All Invoices from the Show drop-down list, the Invoices list displays all invoices, including external invoices.

- 3 In the Invoices list, perform a query in the Bill To Account field for the account name. The Invoices list displays all invoices for that account, sorted by invoice number.
- 4 In the Invoices list, drill down on the invoice number of the invoice you want to view.
- 5 Click a view tab to access specific information for that invoice.

## Viewing Invoice Line Items

To view line items for an invoice, follow this procedure.

### *To view invoice line items*

- 1 Navigate to the Invoices screen.
- 2 In the Show drop-down list, select All External Invoices.
- 3 In the Invoices list, drill down on the invoice number of the invoice. The Invoices form appears with the Line Items list beneath it.

## Viewing Invoice Images From the Invoices Screen

To view the image of an invoice from the Invoices screen, follow this procedure.

### *To view the image of an invoice from the Invoices screen*

- 1 Navigate to the Invoices screen.
- 2 In the Show drop-down list, select All External Invoices.
- 3 In the Invoices list, drill down on the invoice number of the invoice.
- 4 Click the Invoice Image view tab.

The invoice image appears in the Invoice Image view if the administrator sets up the integration between the Bill Statement host and the Siebel application. For more information, see [“Setting Up the Invoice Image Feature in Siebel Energy” on page 192](#).

## Viewing Invoice Images From a Billing Profile

To view the image of an invoice from a billing profile, follow this procedure.

### *To view the image of an invoice from a billing profile*

- 1 Navigate to the Billing Profile portal. For information on the billing profile, see [“Accessing Billing Information” on page 197](#).
- 2 Click the Bills view tab to display a list of bills for the billing profile.
- 3 Click Refresh to retrieve up-to-date data from the billing application.

- 4 In the Bills list, select the record for the invoice image that you want to view, and click View Invoice.

If the user ID and password for the Web Center Content (WCC) host are the same as the user ID and password for the Siebel application, then the invoice image appears in a separate dialog box if the administrator sets up the integration between the WCC host and the Siebel application. For more information, see ["Setting Up the Invoice Image Feature in Siebel Energy" on page 192](#).

- 5 If the user ID and password for the WCC host are different from the user ID and password for the Siebel application, then you must complete the following steps to view the invoice image:
  - a In the dialog box that appears, enter your login credentials, and click Sign In.
  - b Close this dialog box.
  - c In the Bills list, click View Invoice again.

The invoice image appears in a separate dialog box.

- 6 If you want to view another invoice image, then select the record for that invoice image in the Bills list, and click View Invoice again.

For the high-interactivity client, the invoice image appears in a second dialog box. For the Open UI client, the second invoice image replaces the invoice image in the first dialog box.

## Viewing Invoice History

To view the invoice history, follow this procedure.

### *To view the invoice history*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the name of the account.
- 3 Click the Billing Portal view tab.

The Invoice History list displays the most current records for the invoice. If the information does not appear in the Invoice History list, then perform a query to access the correct records.

- 4 Drill down on the invoice number of the invoice.
- 5 In the Line Items list, click the view tab for the information you want to view.

# Process of Entering Payment Against an Outstanding Balance in Siebel Energy (End User)

End users can enter a payment for a customer at the account level or the invoice level, according to the accounting application used at their company.

To record and monitor bill payments, perform the following tasks:



- ["Recording Account-Level Payments" on page 201](#)
- ["Recording Invoice-Level Payments" on page 202](#)
- ["Viewing Billing Payment History" on page 203](#)

## Recording Account-Level Payments

To associate the payment against the account when the company's accounting method applies the payment against the account balance (Balance Forward), perform this task.

This task is a step in ["Process of Entering Payment Against an Outstanding Balance in Siebel Energy \(End User\)" on page 200](#).

### *To record a payment at the account level*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the name of the account.
- 3 Click the Billing Portal view tab.
- 4 In the Account Balance form, click Pay.

The Payments list appears with the account information for the new record.

- 5 In the field, select a method for payment.
- 6 In the Payments list, complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Payment #	Displays a payment number that is automatically generated.
Payment Date	Displays a payment date that is automatically generated.
Payment Amount	Displays the payment amount by using the account and account balance. The Status field must be Open to enter the amount. Otherwise, this field is read-only.
Status	Displays a status value of Open. You can change this value to a value other than Submitted.

- 7 In the More Info form, complete additional fields, if necessary.

The available fields depend on the Payment Method selection you make as follows:

- **EFT.** Deducts payment from the customer's bank account.

Field	Comments
Bank Account #	Type the customer's bank account number.
Account Holder Name	Type the name under which the customer's bank account is registered.
Bank Branch	Type the reference number of the specific branch of the customer's bank.

- **Credit Card.** Charges payment to the customer's credit card.
- **Reference.** Captures payment details at a third-party location, such as post offices or banks.

Field	Comments
Location	Type the location where the payment is made.
Reference #	Type the reference number of the payment.

- 8 Click Submit.

## Recording Invoice-Level Payments

You can associate the payment against one or more invoices when the company's accounting method applies the payment against the bill balance (Open Item).

This task is a step in ["Process of Entering Payment Against an Outstanding Balance in Siebel Energy \(End User\)"](#) on page 200.

### Recording Payments for One Invoice

To record a payment against one invoice, follow this procedure.

#### *To record a payment against one invoice*

- 1 Navigate to the Invoices screen.
- 2 From the Show drop-down list, select All External Invoices.
- 3 In the Invoices list, click Pay.  
A new record is created with the payment number, amount, date, and status already populated.
- 4 Complete [Step 5](#) and the remaining steps of ["Recording Account-Level Payments"](#) on page 201.

## Recording Payments for Multiple Invoices

To record a payment against multiple invoices, follow this procedure.

**NOTE:** You can also begin this procedure from the Billing Portal view. For information, see [Table 16](#) on page 196.

### *To record a payment against multiple invoices*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the name of the account.
- 3 Click the Payments view tab.
- 4 In the Payments list, add a payment.
- 5 Drill down on the payment number of the payment.

The CME Payments view of the Payments screen appears with the Payment Detail form beneath it.

- 6 In the Payments list, drill down on the payment number of the payment again.
- 7 In the Invoices list, enter the amount that you want to apply to each invoice in the Payment Amount field.
- 8 In the Payment Detail form, enter the total amount.

## Viewing Billing Payment History

You can view a history of bill payments by account.

This task is a step in ["Process of Entering Payment Against an Outstanding Balance in Siebel Energy \(End User\)"](#) on page 200.

### *To view billing payment history*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the name of the account.
- 3 Click the Billing Portal view tab.

The Payment History list displays the most current records for the account.

## Viewing Usage Details in Siebel Energy (End User)

End users can view usage details for an invoice.

### *To view usage details*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the name of the account.
- 3 Click the Billing Portal view tab.
- 4 Scroll down to the Additional Info list.
- 5 Drill down on the usage detail of a record.

The Usage Detail list appears with the Usage History list beneath it.

- 6 In the Usage History list, select the data you want to view from the drop-down list.

## Viewing Unbilled Charges in Siebel Energy (End User)

End users can view unbilled charges for an account. The total of all unbilled charges appears in the Billing Portal view, but for a breakdown of the charges, end users can follow this procedure.

**NOTE:** You can also begin this procedure from the Billing Portal view. For information, see [Table 16 on page 196](#).

### *To view unbilled charges*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the name of the account.
- 3 Click the Unbilled Charges view tab.

The Unbilled Charges view displays the charges incurred since the last invoice.

Some fields are described in the following table.

Field	Comments
Next Invoice Date	Displays the date the next statement is generated.
Recurring Charges	Displays the recurring charges for the current period.
NonRecurring Charges	Displays the nonrecurring charges for the current period.
Surcharges	Displays the taxes and surcharges for the current period.
Total Charges	Displays the total unbilled charges for the current period. The formula follows: Recurring charges plus nonrecurring charges plus surcharges equal to total charges.

## Process of Creating Adjustments in Siebel Energy (End User)

End users must sometimes adjust customer bills for various reasons, such as to apply credit to compensate for an overcharge. For more information about integrating the billing component with an external billing application, see [Chapter 18, “Defining Integration Workflows for Siebel Energy.”](#)

To create an adjustment, perform the following tasks:

- 1 [“Requesting an Adjustment to an Invoice” on page 205](#)
- 2 [“Viewing an Adjustment Request Outcome” on page 206](#)
- 3 [“Recording a Customer’s Decision About Adjustment Outcome Terms” on page 207](#)

### Requesting an Adjustment to an Invoice

End users can associate the adjustment request with the entire invoice or with a specific line item in the invoice. Because the billing component is integrated with an external billing application, an adjustment request is sent to the external billing application, which processes the request.

**NOTE:** End users can also begin this procedure from the Billing Portal view. For information, see [Table 16 on page 196](#).

This task is a step in [“Process of Creating Adjustments in Siebel Energy \(End User\)” on page 205](#).

### Requesting Adjustments for Entire Invoices

To request an adjustment to an entire invoice, follow this procedure.

#### *To request an adjustment to an entire invoice*

- 1 Navigate to the Invoices screen.
- 2 From the Show drop-down list, select All External Invoices.
- 3 In the Invoices list, drill down on the invoice number of the invoice.
- 4 Click the More Info view tab.
- 5 On the Invoices form, click Adjust.  
The Adjustment Request form appears with some fields populated.
- 6 Complete any necessary information, such as the reason for the adjustment, and click Submit.  
The request is processed, and the fields are populated with the results.

### Requesting Adjustments for Invoice Line Items

To request an adjustment to a line item in an invoice, follow this procedure.

### ***To request an adjustment to an invoice line item***

- 1 Navigate to the Invoices screen.
- 2 From the Show drop-down list, select All External Invoices.
- 3 In the Invoices list, drill down on the invoice number of the invoice.
- 4 Click the Line Items view tab.  
The Adjustment Request form appears with the Line Items list beneath it. The Status fields default to Open and the Type fields default to Credit. The list displays a history of adjustment requests.
- 5 Select the line item you want to adjust, and click Adjust.  
A new record is created with some fields populated.
- 6 Complete any necessary information, such as the reason for the adjustment, and click Submit.  
The request is processed, and the fields are populated with the results.

## **Viewing an Adjustment Request Outcome**

Typically, the account adjustments and payment arrangement plans are determined in the back office, either manually or through an back-office application. The back-office application then sends the outcome of the request to Siebel Energy.

End users can view the request outcome and the history of adjustment requests.

This task is a step in [“Process of Creating Adjustments in Siebel Energy \(End User\)”](#) on page 205.

## **Viewing Outcomes of Adjustment Requests**

To view the outcome of an adjustment request, follow this procedure.

### ***To view the outcome of an adjustment request***

- 1 Navigate to the Invoices screen.
- 2 From the Show drop-down list, select All External Invoices.
- 3 In the Invoices list, drill down on the invoice number of the invoice.  
The Invoices form appears with the view tabs beneath it.
- 4 Click the Adjustment Requests view tab.
- 5 In the Adjustment Request list, review the Amount Approved field.  
The fields in this list show the response of external billing application to the bill repayment plan request. The Status field is updated automatically.

## Viewing History of Adjustment Requests

To view the history of adjustment requests for an account, follow this procedure.

### *To view the history of adjustment requests*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the name of the account.
- 3 Click the Adjustment Requests view tab.

The Adjustment Requests list displays all of the adjustment requests for the account.

## Recording a Customer's Decision About Adjustment Outcome Terms

After consulting with the customer, end users can record the customer's decision to accept or reject the outcome terms.

This task is a step in ["Process of Creating Adjustments in Siebel Energy \(End User\)"](#) on page 205.

### *To record the customer's decision about the adjustment outcome terms*

- 1 Navigate to the Invoices screen.
- 2 From the Show drop-down list, select All External Invoices.
- 3 In the Invoices list, drill down on the invoice number of the invoice.  
The Invoices form appears with the view tabs beneath it.
- 4 Click the Adjustment Request view tab.
- 5 In the Adjustment Requests list, select the request record.
- 6 In the Customer Decision field, select information to indicate the customer's decision to accept or reject the outcome terms.

**NOTE:** If your company does not require a customer decision regarding a bill adjustment outcome, then the customer decision fields might be unavailable.

## Process of Making Payment Arrangements in Siebel Energy (End User)

End users can request a special arrangement if a customer is unable to pay for services when a bill payment is due. The customer can request a payment plan or a deferral of payment. In response, your company can approve the request, reject the request, or propose its own terms. The response might depend on factors such as corporate policy, customer credit history or credit worthiness, and longevity of the customer's association with your company. For more information about integrating the billing component with an external billing application, see [Chapter 18, "Defining Integration Workflows for Siebel Energy."](#)

To make a payment arrangement, perform the following tasks:

- 1 ["Requesting a Payment Arrangement" on page 208](#)
- 2 ["Viewing the Outcome of a Payment Arrangement Request" on page 209](#)
- 3 ["Recording a Customer's Decision About Payment Arrangement Terms" on page 210](#)

### Requesting a Payment Arrangement

Because the billing component is integrated with an external billing application, a payment arrangement request is sent to the external billing application, which processes the request and generates a response.

This task is a step in ["Process of Making Payment Arrangements in Siebel Energy \(End User\)" on page 208](#).

#### *To request a payment arrangement*

- 1 Navigate to the Invoices screen.
- 2 From the Show drop-down list, select All External Invoices.
- 3 In the Invoices list, drill down on the invoice number of the invoice.
- 4 Click the Payment Arrangements view tab.



- 5 In the Payment Arrangements list, add a record, and complete the fields as necessary. Some fields are described in the following table.

Field	Comments
# of Installments	Type the number of installments. For a single-payment deferral plan, this number is 1.
Installment Amount	Displays the installment amount. This amount is calculated as follows: Amount owed divided by the number of installments.

The external billing application processes the request and populates the Payment Arrangements Outcome form at the bottom of the screen.

## Viewing the Outcome of a Payment Arrangement Request

Siebel Energy receives the outcome of the request, which is generated by the external billing application.

This task is a step in [“Process of Making Payment Arrangements in Siebel Energy \(End User\)”](#) on page 208.

### Viewing Outcomes of Payment Arrangement Requests

To view the outcome of a payment arrangement request, follow this procedure.

#### *To view the outcome of a payment arrangement request*

- 1 Navigate to the Invoices screen.
- 2 From the Show drop-down list, select All External Invoices.
- 3 In the Invoices list, drill down on the invoice number of the invoice.  
The Invoices form appears with the view tabs beneath it.
- 4 Click the Payment Arrangements view tab.
- 5 Scroll down to the Payment Arrangements Outcome form to review the response of the external billing application to the bill repayment plan request.

### Viewing History of Payment Arrangements

To view the history of payment arrangements for an invoice, follow this procedure.

#### *To view the history of payment arrangements*

- 1 Navigate to the Invoices screen.

- 2 From the Show drop-down list, select All External Invoices.
- 3 In the Invoices list, drill down on the invoice number of the invoice.
- 4 Click the Payment Arrangements view tab.
- 5 In the Payment Arrangements list, select Payment Arrangements or Payment Arrangements Details from the drop-down list.
- 6 If the information does not appear in the Payment Arrangements list, then perform a query to access the correct records.

## Recording a Customer's Decision About Payment Arrangement Terms

After consulting with the customer, end users can record the customer's decision to accept or reject the payment plan that their company is offering.

This task is a step in ["Process of Making Payment Arrangements in Siebel Energy \(End User\)"](#) on page 208.

### *To record the customer's decision about the payment outcome terms*

- 1 Navigate to the Invoices screen.
- 2 From the Show drop-down list, select All External Invoices.
- 3 In the Invoices list, drill down on the invoice number of the invoice.
- 4 Click the Payment Arrangements view tab.
- 5 Scroll down to the Payment Arrangements Outcome form, and select a value in the Customer Decision field to indicate the customer's decision to accept or reject the terms.

**NOTE:** If your company does not require a customer decision regarding a bill repayment plan outcome, then the customer decision fields might be unavailable.

## Requesting a Duplicate Invoice in Siebel Energy (End User)

Occasionally, a customer might request a copy of an invoice.

### *To request a duplicate invoice*

- 1 Navigate to the Invoices screen.
- 2 From the Show drop-down list, select All External Invoices.
- 3 In the Invoices list, drill down on the invoice number of the invoice.
- 4 Click the Duplicate Request view tab.

- 5 In the Duplicate Request list, add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Street Address	Select the address to which to send the duplicate bill. The City, State, Zip, and Country fields are automatically populated when you select the address.
Comments	Type specific directions or descriptions about the duplication process.

- 6 To send the invoice to a different mailing address, complete the following steps:
  - a In the Duplicate Request list, select Duplicate Bill Request Detail from the drop-down list.
  - b In the Street Address field, select another address.

## Updating a Billing Profile in Siebel Energy (End User)

When billing a customer, Siebel Energy integrates information, such as exemption information or discounts, that is stored in profiles. For more information about profiles, see [Chapter 4, "Profiles in Siebel Energy."](#)

### *To update a billing profile*

- 1 Navigate to the Accounts screen, then the Accounts List view.
- 2 Drill down on the name of the account.
- 3 Click the Billing Portal view tab.
- 4 Scroll down to the Additional Info form.
- 5 Drill down on the billing profile of a record.
- 6 In the Billing Profile form, update the fields as necessary.

## Additional End-User Tasks for Billing Management

This topic contains information about other tasks related to billing.

### Caller Verification

When receiving an inbound call, end users first verify and find the caller. For more information about caller verification, see *Siebel Applications Administration Guide*.

## **Billing for Services**

Some special billing procedures relate to billing for services. For more information about billing for services, see *Siebel Order Management Guide Addendum for Communications*.

# 14 Work Orders in Siebel Energy

This chapter provides procedures for creating and managing work orders in Siebel Energy. It includes the following topics:

- [“About Work Orders in Siebel Energy” on page 213](#)
- [“Scenario for Using Work Orders in Siebel Energy”](#)
- [“Creating a Work Order in Siebel Energy \(End User\)” on page 214](#)
- [“Adding an Activity to a Work Order in Siebel Energy \(End User\)” on page 215](#)
- [“Creating Work Order Line Items in Siebel Energy \(End User\)” on page 216](#)
- [“Adding Work Order Terms in Siebel Energy \(End User\)” on page 217](#)
- [“Additional End-User Tasks for Work Order Management in Siebel Energy” on page 217](#)

## About Work Orders in Siebel Energy

The Work Orders module in Siebel Energy helps service providers to manage the components needed to activate a service for a customer. A *work order* is an action item that must be completed to implement an order. When an order is submitted, the back-office order processing application divides it into one or more work orders, by using criteria, such as service provider or due dates. A work order has most of the components found in a standard order, but it deals specifically with those items that are required for the provisioning process.

By creating and tracking work orders separately, you can access the status of a sales order. This status is important because work orders are executed by back-office applications. Tracking the status of an order gives you up-to-date access to the information related to the order and can therefore convey it to a customer at any time, either through inbound contact or through outbound workflow-initiated activities.

The Energy Work Orders module works in conjunction with the Energy Order Processing module. It uses much of the work conducted during the order process and provides screens that allow you to manage work orders.

## Scenario for Using Work Orders in Siebel Energy

This topic gives one example of how work orders might be used. You might use work orders differently, depending on your business model.

A customer service representative (CSR) for an energy service provider takes an order for a new small commercial customer, requiring electric service, gas service, and a facility submetering service. The order created by the CSR includes three line items, one for each service. The CSR provides a quote to the customer, who accepts it and asks that the order be placed.

In the Order Summary view, the CSR submits the order to the back-office applications. The energy service provider must notify the distribution companies for electric and gas services, so submitting the order creates work orders for these services. In this case, the order is separated into three separate work orders, which are then submitted to the various providers for activation, as follows:

- **Electric service.** This service is provided by the electric distribution company.
- **Gas service.** This service is provided by the gas distribution company.
- **Submetering service.** This service is provided by an outsource partner.

The customer calls back a week later to see whether her account has been switched over. A different CSR takes the call and is able to search the account to find any open orders. When the CSR finds the appropriate order and the work orders associated with the order. Although the electric and gas services have been switched, he sees that the submetering work order is still open due to a backlog in the appropriate meters. From the associated notes and activities, he is able to tell the customer that the new submetering service will be installed within the next three days.

Figure 21 shows the sequence of procedures that an end user might follow to manage work orders.

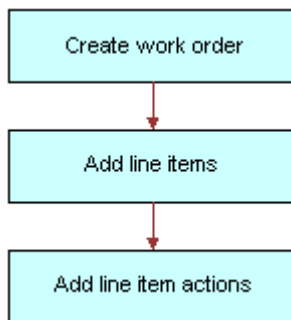


Figure 21. Example of Sequence for Work Orders

## Creating a Work Order in Siebel Energy (End User)

End users can create work orders.

### *To create a work order*

- 1 Navigate to the Work Orders screen, then the Work Order List view.

- 2 Add a record, and complete the necessary fields in the record and the More Info form. To access more fields, click the show more button in the form.

Some fields are described in the following table.

Field	Comments
Account	Select the master account for the work order. The field for the account number is automatically populated when you select a value in this field.
Last Name	Select the name of the contact for the work order.
Order	Select the sales order associated with the work order.
Provider	Select the vendor for the work order.
Address	Displays the address of the account.

## Adding an Activity to a Work Order in Siebel Energy (End User)

End users can create an activity and associate it with a premises for the following reasons:

- Remind themselves of procedures related to a premises that they must perform.
- Communicate procedures related to a work order that other members of the organization must perform.

Activity plans include a list of activities to be completed to resolve a problem. If an appropriate activity template exists, then end users can select the template to populate their activities list with a defined set of activities. Then end users can customize the list, if necessary.

### Associating Activity Plans With Work Orders

To associate an activity plan with a work order, follow this procedure.

#### *To associate an activity plan with a work order*

- 1 Navigate to the Work Orders screen, then the Work Order List view.
- 2 Drill down on the order number of the work order.
- 3 Click the Activity Plans view tab.
- 4 In the Activity Plans list, add a record.
- 5 In the Template field, select an Activity Template.

### Creating Activity Plans for Work Orders

To create an activity plan for a work order, follow this procedure.

*To create an activity for a work order*

- 1 Navigate to the Work Orders screen, then the Work Order List view.
- 2 Drill down on the order number of the work order.
- 3 Click the Activities view tab.
- 4 In the Activities list, add a record, and complete the necessary fields.

## Creating Work Order Line Items in Siebel Energy (End User)

End users can create line items and line item actions to be allocated for a work order.

### Creating Line Items for Work Orders

To create line items to be allocated for a work order, follow this procedure.

*To create line items to be allocated for an order*

- 1 Navigate to the Work Orders screen, then the Work Order List view.
- 2 Drill down on the order number of the work order.
- 3 Click the Line Items view tab.
- 4 Scroll down and click the Line Detail subview tab.
- 5 In the Line Detail form, add a record, and complete the necessary fields. To access more fields, click the show more button in the form.

Some fields are described in the following table.

Field	Comments
Product	Select the product. When you select a product, you select a line item from the associated service order. The Action, Due, UoM, Start Price, and Status fields are automatically populated with the information from the Order Line Item view.
Ship to Last Name	Select the name of an existing contact or add a new contact. When you select a contact, the Ship to First Name, Address, City, State, ZIP, and Country fields in the Order Line Item view are automatically populated.

### Adding Line Item Actions to Work Orders

To add a line item action to a work order, follow this procedure.

*To add a line item action*

- 1 Navigate to the Work Orders screen, then the Work Order List view.



- 2 Drill down on the order number of the work order.
- 3 Click the Line Item Actions view tab.
- 4 In the Line Item Actions list, add a record, and complete the necessary fields.

## Adding Work Order Terms in Siebel Energy (End User)

End users can add a work order term.

### *To add a work order term*

- 1 Navigate to the Work Orders screen, then the Work Order List view.
- 2 Drill down on the order number of the work order.
- 3 Click the Terms view tab.
- 4 In the Terms form, complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Payment Terms	Select the terms for how the customer pays.
Return To	Select the return address for order items.
Status	Select the status of the order.
Freight Terms	Select the terms for how to ship the order.

## Additional End-User Tasks for Work Order Management in Siebel Energy

This topic contains information about another task related to work orders.

### **Work Orders and Attachments**

At any time, end users can store additional information relating to a work order in the database by associating an electronic file with the work order record. For information about associating an attachment with a record, see *Siebel Fundamentals*.



# 15 Service Requests and Trouble Tickets in Siebel Energy

This chapter describes the procedures for initiating and managing service requests and trouble tickets in Siebel Energy. It includes the following topics:

- [“About Service Requests and Trouble Tickets in Siebel Energy” on page 219](#)
- [“Scenario for Using Service Requests and Trouble Tickets in Siebel Energy” on page 221](#)
- [“Setting Up Service Requests and Trouble Tickets in Siebel Energy” on page 222](#)
- [“Creating a Trouble Ticket Record in Siebel Energy \(End User\)” on page 223](#)
- [“Assigning a Trouble Ticket in Siebel Energy \(End User\)” on page 223](#)
- [“Associating Parent and Child Trouble Tickets in Siebel Energy \(End User\)” on page 224](#)
- [“About Trouble Ticket Solutions” on page 225](#)
- [“Resolving Trouble Tickets in Siebel Energy \(End User\)” on page 225](#)
- [“Using the Customer Satisfaction Survey in Siebel Energy \(End User\)” on page 227](#)
- [“Analyzing Trouble Tickets Data in Siebel Energy \(End User\)” on page 227](#)
- [“Additional End-User Tasks for Trouble Ticket Management in Siebel Energy” on page 227](#)

## About Service Requests and Trouble Tickets in Siebel Energy

Siebel Energy service requests and trouble tickets are primarily used by customer service representatives (CSRs), their managers, and network operations center (NOC) agents.

*Service requests* and *trouble tickets* are database records that are used to manage problems with equipment or general requests for service. This chapter is mostly about trouble tickets, but it also explains the differences between trouble tickets and service requests and tells you where you can find more information about service requests. The following information is included in this chapter:

- This chapter guides you in setting up features that help to automate trouble ticket management.
- This chapter describes procedures typically used by end users to create, monitor, and close trouble tickets.
- This chapter describes procedures that you can use for overall management of trouble tickets.

Service requests and trouble tickets perform similar functions. The main differences follow:

- Trouble tickets functionality supports parent-child relationships.

- Trouble tickets are typically used to record and track problems with the functioning of services and networks, while service requests are typically used to record and track general customer problems and requests. Examples of general problems and requests are billing problems, requests for new equipment, and requests for billing statements.

Service requests and trouble tickets are managed through the Service Requests and Trouble Tickets screens.

## Initiation of Service Requests and Trouble Tickets

Service requests and trouble tickets can be initiated in the following ways:

- A customer calls the call center to report a problem with the phone line.
- A network outage management application that is integrated with Siebel Energy automatically creates a trouble ticket record in the Siebel Energy database.
- Agents can reassign service requests and trouble tickets to other groups or individuals for resolution. Alternatively, agents can break a service request or trouble ticket down into different activities, which can be assigned to different owners. In this case, the agent can monitor progress towards completion of the activities and close the service request or trouble ticket.

## Creation of Service Requests and Trouble Tickets

Service requests and trouble tickets can be created within Siebel Energy or moved into Siebel Energy by the following methods:

- Customers using Oracle's Siebel eService.
- Customers and partners using an Automated Call Distributor (ACD).
- Call center agents responding to phone calls or email from customers.
- NOC agents responding to network problems.
- Automated network outage management applications that are integrated with Siebel Energy.

## Trouble Ticket Referral

Trouble tickets can be referred from Siebel Energy to trading partner software through integration with an electronic bonding gateway, using Siebel Enterprise Application Integration (Siebel EAI).

## Additional Information About Service Requests

The remainder of this chapter describes trouble ticket management. For more information about service requests, see *Siebel Field Service Guide* and *Siebel Applications Administration Guide*.

## Scenario for Using Service Requests and Trouble Tickets in Siebel Energy

This topic gives one example of how service requests and trouble tickets might be used. You might use service requests and trouble tickets differently, depending on your business model.

During a typical day in a customer service organization, a group of customer service representatives (CSRs) respond to customer phone calls and assign thirty trouble tickets. Twenty of the trouble tickets are solved using existing solutions, which the CSRs associate with the trouble tickets. Ten of the trouble tickets require new solutions, which the CSRs create after performing the necessary research. Between them, the CSRs make two mistakes when they click the wrong part of the user interface during an operation. They note their mistakes in email messages to the manager and ask the manager to correct them.

At the end of the day, the manager performs routine administrative work on the solutions that were created during the day, starting with correcting the two errors. In one error, a CSR accidentally associated a solution with the wrong product defect. The manager corrects this error by dissociating them. A different CSR incorrectly associated a solution with a resolution document. The manager resolves the problem by dissociating them.

Next, the manager reviews each of the new solutions in turn. She performs a query for the solutions that were created during the day and examines the first record. She checks that it is associated with a trouble ticket and then reads the solution. Being familiar with this type of problem, the manager recalls a similar solution that might be useful for a CSR to know about. She locates the similar solution and associates the two records.

The manager also recalls a technical document on the company's network that might help to explain the problem. She locates the document, creates a new resolution document record, attaches the document to the record, and associates the record with the solution. She is now satisfied with the solution, so she changes its status to Final and makes sure that it is only visible internally.

The manager reviews the second solution and checks that it is associated with a trouble ticket. This solution is incomplete so the manager leaves the status as Draft. She informs the CSR who created the solution that this problem is related to, and can be associated with, a known product defect, and asks the CSR to research it more thoroughly.

The manager checks that the third solution is associated with a trouble ticket and reads the resolution documents associated with it. One of the resolution documents is an internal technical document that was recently revised and must be replaced. The manager dissociates the solution from the document, locates the revised version on the network, adds it to the database, and associates it with the solution. She then changes the status of the solution to Final.

The manager reviews each of the remaining newly created solutions in a similar manner.

Figure 22 shows the sequence of procedures that end users might follow to manage trouble tickets.

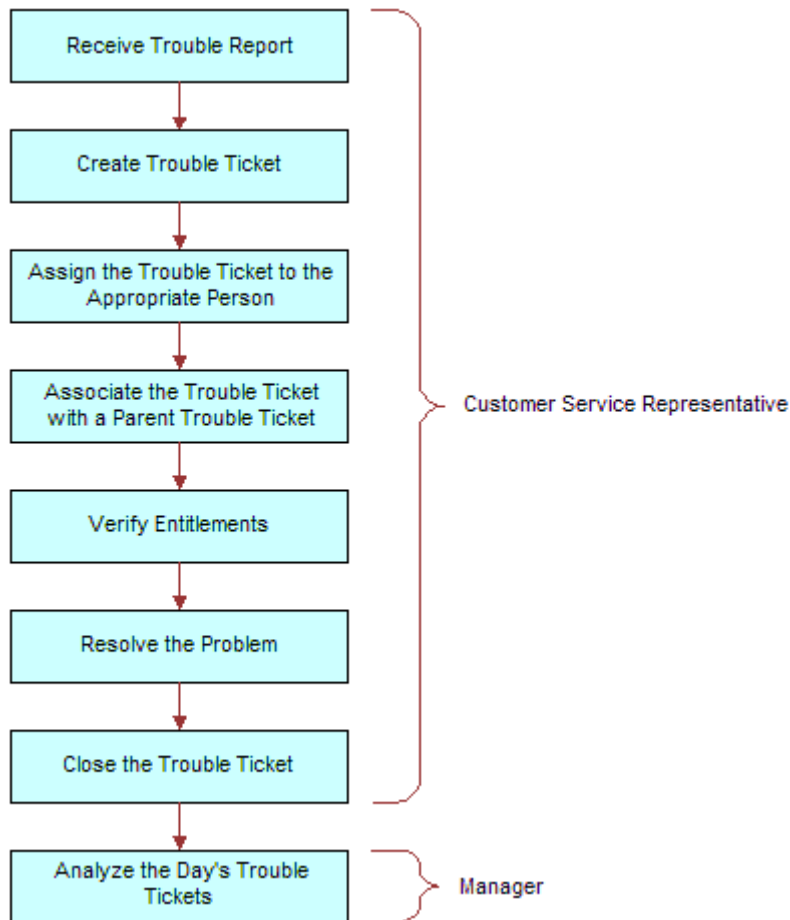


Figure 22. Example of Sequence for Trouble Tickets

## Setting Up Service Requests and Trouble Tickets in Siebel Energy

Administrators can make the CSRs' job easier by creating scripts and automating the assignment of trouble tickets as follows:

- You can use Oracle's Siebel SmartScript to provide scripts that guide CSRs as they collect information about trouble tickets. For more information about creating scripts, see *Siebel SmartScript Administration Guide*.
- CSRs or other qualified personnel can manually assign ownership of a trouble ticket to themselves, to another employee, or to a group. With the appropriate setup, Oracle's Siebel Assignment Manager can be used to give the CSR the option of automating the assignment.

For more information about setting up Siebel Assignment Manager (including rules, criteria, workload, employees, positions, and territories), see *Siebel Assignment Manager Administration Guide*.

## Creating a Trouble Ticket Record in Siebel Energy (End User)

End users can create a trouble ticket record.

### To create a trouble ticket

- 1 Navigate to the Trouble Tickets screen, then the Trouble Ticket List view.
- 2 Add a record, and complete the necessary fields in the record and the More Info form. To access more fields, click the show more button in the form.

Some fields are described in the following table.

Field	Comments
Ref #	Type the reference number. An external application can identify the trouble ticket by using this number.
Last Name	Select the last name of the person reporting the problem.
Owner	Select the user ID of the person or group responsible for resolving the trouble ticket (for example, an end user, another service representative, or a service group).

## Assigning a Trouble Ticket in Siebel Energy (End User)

If end users are unable to resolve trouble tickets themselves, then they can assign them to another qualified CSR or to a group. In general, trouble tickets can be assigned in these ways:

- **Batch assignment.** Siebel Assignment Manager can assign many trouble tickets at a scheduled time. For more information, see *Siebel Assignment Manager Administration Guide*.
- **Dynamic assignment.** Siebel Assignment Manager can automatically assign trouble tickets at preset intervals. For more information, see *Siebel Assignment Manager Administration Guide*.
- **Interactive assignment.** Siebel Assignment Manager is invoked manually from the menu button in the More Info view, as described in the next procedure.
- **Manual assignment.** Users select the owner in the Trouble Tickets screen, as described in the next procedure.

*To assign a trouble ticket manually to a person or group*

- 1 Navigate to the Trouble Tickets screen, then the Trouble Ticket List view.
- 2 Drill down on the ticket ID of the trouble ticket.
- 3 In the More Info form, click the show more button, and then perform one of the following steps:
  - To assign a trouble ticket using Oracle's Siebel Assignment Manager, click the menu button, select Assign, and then select a person.
  - To manually assign a trouble ticket to a person, select a person in the Owner field.
  - To manually assign a trouble ticket to a group, select a group in the Group field.

## Associating Parent and Child Trouble Tickets in Siebel Energy (End User)

The general procedure for setting up a parent-child relationship is to create the child trouble ticket and then associate it with an existing trouble ticket for the parent.

End users can group many child trouble tickets under one parent trouble ticket. Grouping several trouble tickets under one parent can be useful for managing a single network problem that results in calls from many customers.

### Associating Child Trouble Tickets With Parent Trouble Tickets

To associate a child trouble ticket with existing parent trouble tickets, follow this procedure.

**NOTE:** A list of children of a selected trouble ticket appears in the Related Trouble Tickets view.

*To associate a child trouble ticket with existing parent trouble tickets*

- 1 Navigate to the Trouble Tickets screen, then the Trouble Ticket List view.
- 2 Drill down on the ticket ID of the child trouble ticket.
- 3 Click the Parent Trouble Tickets view tab.

The Trouble Ticket Details form appears with the Parent Trouble Tickets list beneath it.
- 4 In the Parent Trouble Tickets list, create a new record.
- 5 In the Add Trouble Tickets dialog box, select one or more parent trouble tickets.

### Verifying Entitlements for Trouble Tickets

To verify an entitlement associated with a trouble ticket, follow this procedure.

*To verify the entitlement associated with a trouble ticket*

- 1 Navigate to the Trouble Tickets screen, then the Trouble Ticket List view.



- 2 Drill down on the ticket ID of the trouble ticket.
- 3 Click the More Info view tab.
- 4 In the More Info form, click the show more button to access more fields.
- 5 In the Entitlement Name field, select an entitlement.

**NOTE:** For information about determining how this dialog box is populated, see *Siebel Field Service Guide*.

- 6 In the More Info form, click Verify.

The Due Date field is automatically populated with the appropriate time period. For instance, if the customer is entitled to have a problem fixed within two hours, then the Due Date field reflects this time period.

## About Trouble Ticket Solutions

Customer service organizations estimate that approximately 85 percent of assigned trouble tickets are related to problems that have been previously encountered. Siebel Energy provides access to descriptions of how previous trouble tickets were resolved. When there is no existing solution to a trouble ticket, a member of the organization can research the problem and create a new description in the form of a solution record.

### Solutions Defined

In Siebel Energy, the term *solution* specifically means a record in the Siebel Energy database that includes a description of how a previous trouble ticket was resolved or how an anticipated future trouble ticket can be resolved. The word solution is also used in general terms to mean an answer to a problem.

### Further Information

End users can review and create solutions for trouble tickets using the same methods used to review and create solutions for service requests. For more information about working with solutions, see *Siebel Field Service Guide*.

## Resolving Trouble Tickets in Siebel Energy (End User)

This topic describes the ways of resolving trouble tickets.

### Adding an Activity to a Trouble Ticket

Resolving a trouble ticket might require several procedures, performed by multiple people or groups. End users can create an activity for each step and assign the activity to themselves, another qualified person, or a group.

### *To add an activity to a trouble ticket*

- 1 Navigate to the Trouble Tickets screen, then the Trouble Ticket List view.
- 2 Drill down on the ticket ID of the trouble ticket.
- 3 Click the Activities view tab.
- 4 In the Activities list, add a record, and complete the necessary fields.

## Associating Activity Plans With Trouble Tickets

Activity plans include a list of activities to be completed to resolve a problem. If an appropriate activity template exists, then end users can select the template to populate their activities list with a defined set of activities. Then end users can customize the list, if necessary. For more information about working with activities and activity plans, see *Siebel Applications Administration Guide*.

### *To associate an activity plan with a trouble ticket*

- 1 Navigate to the Trouble Tickets screen, then the Trouble Ticket List view.
- 2 Drill down on the ticket ID of the trouble ticket.
- 3 Click the Activity Plans view tab.
- 4 In the Activity Plans list, add a record.
- 5 In the Template field, select an Activity Template.

## Closing a Trouble Ticket

When a trouble ticket is resolved, end users can change its status to Closed in any Trouble Ticket list or form. Changes cannot be made to trouble tickets that are closed. To continue working on a closed trouble ticket, first change its status to Open or Pending.

### *To close a trouble ticket*

- 1 Navigate to the Trouble Tickets screen, then the Trouble Ticket List view.
- 2 Drill down on the ticket ID of the trouble ticket.
- 3 Click the More Info view tab.
- 4 In the More Info form, select a value of Closed in the Status field.

**NOTE:** When you save or click outside the record, the Sub-Status field changes to Resolved and the Date Closed field reflects the current time and date.

## Using the Customer Satisfaction Survey in Siebel Energy (End User)

Customer satisfaction surveys allow end users to conduct a survey with the person who initiated a trouble ticket. If they have Chart Works Server (a third-party application) installed, then a chart displays a measurement of the customer's satisfaction as they record the customer's responses. On a subsequent occasion, they can conduct another survey without overwriting existing survey records.

As part of closing a trouble ticket, end users can conduct a customer survey in person, or they can use the Correspondence screen to send a letter and survey to the originator of a trouble ticket. When they mail a survey, an activity is automatically generated for the mailing. For information about using the Correspondence screen to send out customer satisfaction surveys, see *Siebel Applications Administration Guide*.

### *To conduct a customer survey*

- 1 Navigate to the Trouble Tickets screen, then the Trouble Ticket List view.
- 2 Drill down on the ticket ID of the trouble ticket.
- 3 Click the Customer Satisfaction Survey view tab.
- 4 Scroll down to the Survey Details form, and add a record.
- 5 Ask each of the questions on the Survey form and record the customer's answer for each field.

## Analyzing Trouble Tickets Data in Siebel Energy (End User)

You can use charts to perform various types of analyses on your group's trouble tickets.

### *To analyze trouble tickets data using charts*

- 1 Navigate to the Trouble Tickets screen, then the Chart view.
- 2 In the Trouble Ticket list, select the trouble ticket.
- 3 In the Charts form, select appropriate chart settings.

## Additional End-User Tasks for Trouble Ticket Management in Siebel Energy

This topic contains information about other tasks related to trouble tickets.

## Customer Verification

When a customer telephones a call or service center, end users must verify whether the person is an existing or new customer. End users navigate to the Accounts or Contacts screen and perform a query of information about the customer, such as the last name, social security number, and so on. If information about the customer is available, then end users can review the requests that have already been entered for the customer. If no information about the customer is available, then end users can enter the customer information. For more information about accounts and contacts, see [Chapter 3, "Accounts in Siebel Energy,"](#) and [Chapter 5, "Contacts in Siebel Energy."](#)

## Entitlement Verification

When creating a trouble ticket, verify the type of service agreement and entitlements connected with it. For more information about service agreements and entitlements see [Chapter 6, "Agreements and Entitlements in Siebel Energy."](#)

## Communication with Field Service Agents

End users can contact a field service agent. Siebel Energy allows you to send messages about trouble tickets in several ways, including sending a text message to a pager. For more information, see *Siebel CTI Administration Guide*.

## Trouble Tickets and Attachments

At any time, end users can store additional information relating to a trouble ticket in the database by associating an electronic file with the trouble ticket record. For information about associating an attachment with a record, see *Siebel Fundamentals*.

# 16 Credit Management in Siebel Energy

This chapter describes the procedures for managing and closing credit alerts. It also describes how to create account adjustments and set up payment plans. It includes the following topics:

- [“About Credit Management in Siebel Energy” on page 229](#)
- [“Scenario for Using Credit Management in Siebel Energy” on page 230](#)
- [“Reviewing and Adding a Credit Alert in Siebel Energy \(End User\)” on page 232](#)
- [“Adding an Activity to a Credit Alert in Siebel Energy \(End User\)” on page 233](#)
- [“Contacting the Customer About a Credit Alert \(End User\)” on page 234](#)
- [“Entering Payments for Credit Alerts in Siebel Energy \(End User\)” on page 234](#)
- [“Process of Creating Account Adjustments or Payment Plans in Siebel Energy \(End User\)” on page 235](#)
- [“Closing a Credit Alert Manually in Siebel Energy \(End User\)” on page 239](#)
- [“Additional End-User Tasks for Credit Management in Siebel Energy” on page 240](#)

## About Credit Management in Siebel Energy

Credit management functionality frequently resides in third-party back-office credit applications. Siebel Enterprise Application Integration (Siebel EAI), which is part of Siebel Energy, provides you with the ability to integrate with these applications and to use their information and functionality.

If customers are late in paying their bills or have not paid their bills in full, then their accounts are flagged by the third-party credit application. The rules for detecting late payment or nonpayment are defined in the credit application. Siebel Energy can interpret late payment or nonpayment messages that the credit application generates.

As a basis for credit management, Siebel Energy provides information in the form of credit alerts. A *credit alert* is a Siebel Energy credit record that can be generated by messages from a back-office credit management application when a customer breaches a credit threshold. It can also be generated manually by a customer request or by the initiative of a customer service representative (CSR). Credit alerts can be resolved through a variety of means, such as customer payment of the outstanding amount, adjustments to a customer account to correct an erroneous billing, and an agreement with a customer for a payment arrangement plan.

Siebel Energy Credit Management provides the following capabilities:

- **Credit Alerts.** Generates credit alerts when external credit management applications send information about changes in the credit situation of a customer. Provides the ability to send updated credit alert information back to the external credit management applications.

- **Activities.** Generates activities associated with a credit alert. Also allows you to add activities for a credit alert.
- **Payments.** Allows you to send customer payments to the credit management application in response to a credit alert.
- **Account Adjustments.** Allows you to send requests to the credit management application for adjustments to a customer account when a credit alert is in error. Displays the responses of the credit management application to these requests.
- **Payment Arrangements.** Allows you to send requests to the credit management application for payment arrangement plans in response to a credit alert. Displays the responses of the credit management application to these requests.
- **Attachments.** Allows you to attach external documents to a credit alert.

In addition, Siebel Energy provides the following credit management requirements in other modules:

- **Credit Rating.** Displays the customer's credit rating details, including credit score, source, and date. For more information, see ["About Financial Profiles in Siebel Energy" on page 63](#).
- **Billing Information.** Displays customer billing information you might need to resolve a credit alert.

CSRs use Credit Management functionality to manage and monitor customer credit issues. They are responsible for reviewing with the customer all account information and credit issues, as well as answering billing inquiries, suggesting payment arrangement plans, and making account adjustments.

Customer service supervisors use Credit Management functionality to determine whether a CSR is allowed to request credit adjustments on a customer's account, set up payment arrangement plans, and maintain billing profiles.

## Scenario for Using Credit Management in Siebel Energy

This topic gives one example of how credit management might be used. You might use credit management differently, depending on your business model.

A CSR is responsible for handling credit queries for all of your small and medium-sized customers. A business customer has a contract for electrical services for its offices. The owner usually pays the bill on time. However, the latest bill for electrical services is overdue by 18 days.

This nonpayment is automatically detected by the company's accounts receivable application and is forwarded to the credit management application, which then forwards a nonpayment message to Siebel Energy. The message causes Siebel Energy to create a credit alert.

Siebel Energy then generates an activity to contact the owner and sets the account status appropriately. The credit alert appears in the customer service supervisor's queue by default, and the supervisor assigns the credit alert to the CSR.

The CSR examines the credit alert and reviews the billing information needed to handle any customer questions. She also checks for all credit alerts raised against the customer's account in the last 12 months to see whether there is a history of delinquency. This credit alert is the first credit alert against the customer's account. The CSR then checks the customer's credit rating, which is acceptable.

The CSR looks up contact information for the customer in Siebel Energy and telephones the owner, who is listed as the primary contact for the customer account. The owner apologizes for the delay in payment of the bill and explains that the company has experienced a temporary cash flow problem. The owner asks what options are available. The CSR informs the owner that he can either delay the payment of the bill or request a payment arrangement plan. The owner asks to repay the outstanding bill in three installments.

The CSR enters the required information into Siebel Energy, sets the credit alert's Status to Pending, and records the details of the conversation in the Comments field.

Siebel Energy transmits this information to the credit management application. The credit management application processes the request overnight and responds with an update to the credit alert. The next day, the CSR checks for all open and pending credit alerts assigned to them. The CSR notices that the customer's payment arrangement request has been approved.

The CSR contacts the owner and informs him of the outcome. The CSR then writes a letter confirming the details of the payment arrangement plan, and attaches the letter to the credit alert. Then the CSR updates the Action Type of the credit alert to Payment Arrangement Agreed.

Figure 23 shows the sequence a CSR might use to process a customer credit alert.

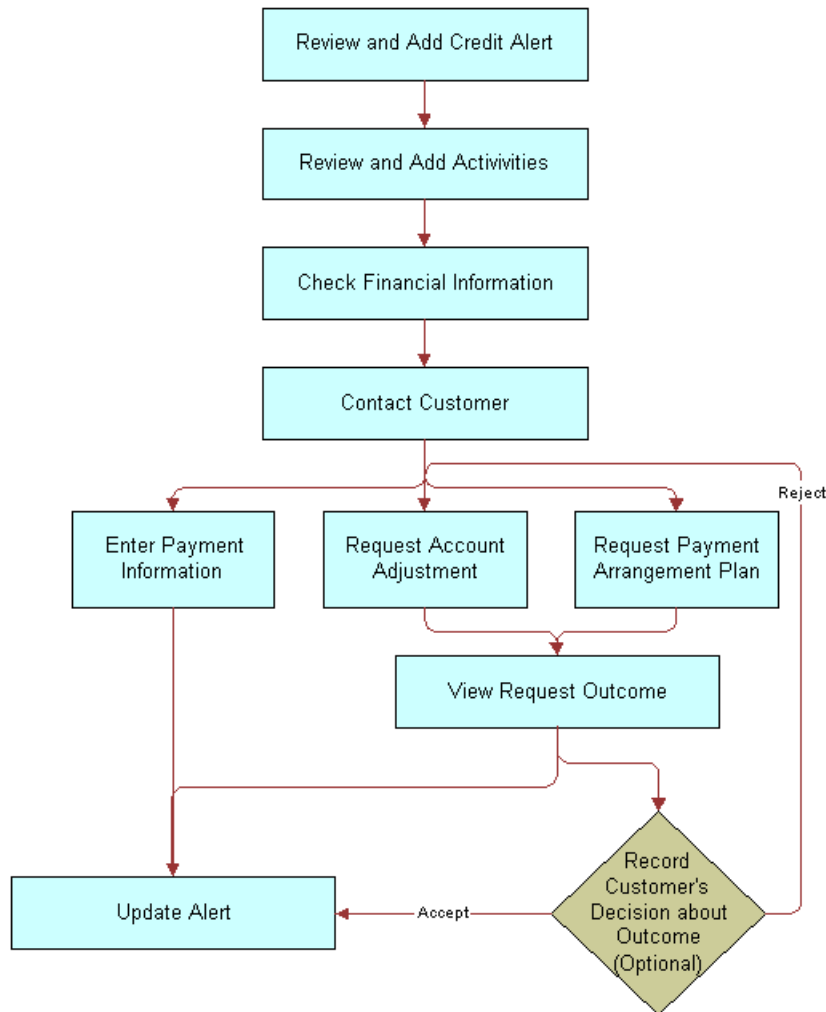


Figure 23. Example of Sequence for Credit Management

## Reviewing and Adding a Credit Alert in Siebel Energy (End User)

The All Credit Alerts view displays all credit alerts. The My Credit Alerts view displays only the credit alerts that are assigned specifically to an end user. These views are identical except for the ownership. The policies for assignment of credit alerts are determined by their company.

End users can use the All Credit Alerts view or the My Credit Alerts view to see external credit alerts, which originate from your company's external credit management application. They can limit the list by selecting a predefined query. Siebel Energy includes the queries All, Closed, Open and Unassigned Alerts.



End users can also use these views to create internal credit alerts for preemptive measures. These alerts can record situations such as the likelihood of a delayed customer payment. If they have permission to do so, then end users can create a credit alert and a corresponding payment arrangement plan record.

When contacted regarding a credit problem, a customer might want you to query the billing account. For example, the customer might believe that the bill is incorrect. Therefore, end users might want to refer to the customer billing data to deal with the customer contact. For more information, see [Chapter 13, “Billing in Siebel Energy.”](#)

### *To create an internal credit alert manually*

- 1 Navigate to the Credit Management screen, then the Credit Alert List view.
- 2 Add a record, and complete the necessary fields in the record and the More Info form. To access more fields, click the show more button in the form.

Some fields are described in the following table.

Field	Comments
Created On	Displays the date and time when you create the credit alert.
Priority	Select the priority of the action to perform in response to the credit alert.
Status	Select the status of the credit alert.
Account	Select the account associated with the credit alert.
Amount Owed	Type the amount the customer owes.
Action Type	Select the type of action to perform in relation to a credit alert. This field might generate or require one or more activities.
Owner	Select the name of the person to whom the credit alert is assigned.
Invoice #	Select the invoice number associated with the credit alert.
Alert #	Displays a unique identifier for the credit alert, which might be generated within Siebel Energy.
Account #	Displays the account number associated with the credit alert.
Agreement	Select the agreement associated with the credit alert.
Source	Displays a value that indicates when the alert was generated externally by a credit management application or internally by a CSR.

## Adding an Activity to a Credit Alert in Siebel Energy (End User)

End users can associate activities with a credit alert. The Credit Alert Activities view displays all activities associated with a selected credit alert.

*To add an activity to a credit alert*

- 1 Navigate to the Credit Management screen, then the Credit Alert List view.
- 2 Drill down on the alert number of the credit alert.
- 3 Click the Activities view tab.
- 4 In the Activities list, add a record, and complete the necessary fields.

## Contacting the Customer About a Credit Alert (End User)

Contact the customer to discuss the reason for the credit alert and the available payment options. Determine whether it is necessary to adjust the customer's account, or help the customer to decide whether they want to send payment immediately or request a payment arrangement plan.

## Entering Payments for Credit Alerts in Siebel Energy (End User)

Siebel Energy allows end users to submit a record of payment received from a customer in response to a credit alert. One possible resolution for a credit alert involves the customer's immediate payment of the amount outstanding. End users can enter multiple instances of payment information for a single credit alert. For more information about entering payment information, see "[Process of Entering Payment Against an Outstanding Balance in Siebel Energy \(End User\)](#)" on page 200.

*To enter a payment for a credit alert*

- 1 Navigate to the Credit Management screen, then the Credit Alert List view.
- 2 Locate the credit alert for which you want to record a payment.
- 3 Drill down on the billing profile of the credit alert.
- 4 On the Billing Profile screen, click the Payments view tab.
- 5 In the Payments list, add a new record.
- 6 In the Capture New Payment dialog box, complete the fields as needed.
- 7 Click Submit.

Siebel Energy displays the payment record in the Payments list and submits the payment to the billing application.

## Process of Creating Account Adjustments or Payment Plans in Siebel Energy (End User)

A customer might have been incorrectly billed for a service and therefore might not have made a payment. In that case, end users must adjust the customer's billing account. Typically, they associate an account adjustment with a credit alert because it might solve a customer credit issue. The actual account adjustment is made in a third-party billing or accounts receivable application. However, Siebel Energy provides the ability to request an adjustment and to receive information about the outcome.

Another customer might be facing financial difficulties and is unable to meet obligations to pay for services. Such a customer might request a payment arrangement plan with installments or a deferral of payment. In response, your company can approve the request, reject the request, or propose its own terms. The response might depend on factors such as corporate policy, customer credit history or credit-worthiness, and length of the customer's association with your company. A payment arrangement plan is associated with a credit alert because it might resolve a customer credit issue.

The customer request is sent to the back-office credit management application for approval. The customer request can be approved in full, rejected entirely, or modified with new terms. The credit management application then sends the outcome back to Siebel Energy.

**NOTE:** You can request either an installment plan or a payment deferral. For a deferral request, specify one installment to be paid at a future date.

To create account adjustments and payment plans, perform the following tasks:

- 1 ["Submitting Requests for Account Adjustments or Payment Plans" on page 235](#)
- 2 ["Viewing Account Adjustment or Payment Plan Request Outcomes" on page 237](#)
- 3 ["Recording Customer Decisions About Account Adjustments or Payment Plans" on page 238](#)

## Submitting Requests for Account Adjustments or Payment Plans

End users first submit a request for an account adjustment or a payment plan.

This task is a step in ["Process of Creating Account Adjustments or Payment Plans in Siebel Energy \(End User\)" on page 235](#).

### Submitting Requests for Account Adjustments

To submit a request for an account adjustment, follow this procedure.

**NOTE:** It is possible to submit multiple account adjustment requests for a single account. However, this situation is not typical.

### *To submit a request for an account adjustment*

- 1 Navigate to the Credit Management screen, then the Credit Alert List view.
- 2 Drill down on the alert number of the credit alert.
- 3 Click the Account Adjustments view tab.

The Account Adjustments list displays the history of adjustment requests.

- 4 In the Account Adjustments list, add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Date	Select the date and time the request of the adjustment. This field defaults to current date and time.
Amount	Type the amount of the adjustment. This field defaults to amount owed on the credit alert.
Type	Select the type of adjustment request.
Status	Select the status of the request. This field defaults to a value of Open.
Reason	Select the reason for the adjustment.

### **Submitting Requests for Payment Arrangement Plans**

To submit a request for a payment arrangement plan, follow this procedure.

### *To submit a request for a payment arrangement plan*

- 1 Navigate to the Credit Management screen, then the Credit Alert List view.
- 2 Drill down on the alert number of the credit alert.
- 3 Click the Payment Arrangements view tab.
- 4 In the Payment Arrangements form, select Payment Arrangement Details from the Show drop-down list.
- 5 In the Payment Arrangement Details form, add a record, and complete the necessary fields.

Some fields are described in the following table.

Field	Comments
Plan Type	Select the type of payment arrangement plan.
# of Installments	Type the number of installments for payment arrangement. For a single-payment deferral plan, this number is 1.

Field	Comments
Installment Amount	Displays the amount of each installment. This field is automatically populated when you enter the number of installments. The installment amount equals the original amount due divided by the number of installments.
Original Amount Due	Type the total amount due.
Original Due Date	Select the original due date for payment.
Plan Start Date	Select the start date of the payment arrangement plan.
Plan End Date	Select the end date of the payment arrangement plan. For a single-payment deferral plan, use the same date for both the start date and the end date.
Status	Select a value of Pending for the status of the request.

- 6 Return to the Credit Alert List view.
- 7 In the Action Type field, select Payment Arrangement Requested.

## Viewing History of Payment Arrangements

To view a history of payment arrangements, follow this procedure.

### *To view a history of payment arrangements*

- 1 Navigate to the Credit Management screen, then the Credit Alert List view.
- 2 Drill down on the alert number of the credit alert.
- 3 Click the Payment Arrangements view tab.
- 4 In the Payment Arrangements form, select Payment Arrangements from the Show drop-down list.

## Viewing Account Adjustment or Payment Plan Request Outcomes

Typically, the account adjustments and payment arrangement plans are agreed upon in the back office, either manually or through a back-office application. The back-office application then sends the outcome of the customer request to Siebel Energy.

This task is a step in [“Process of Creating Account Adjustments or Payment Plans in Siebel Energy \(End User\)”](#) on page 235.

## Viewing Outcomes of Account Adjustment Requests

To view the outcome of an account adjustment request, follow this procedure.

### *To view an account adjustment outcome*

- 1 Navigate to the Credit Management screen, then the Credit Alert List view.
- 2 Drill down on the alert number of the credit alert.
- 3 Click the Account Adjustments view tab.
- 4 In the Account Adjustments list, review the response of the credit management application to the adjustment request, specifically the Status, Amount Approved, and Approval Description fields.

**NOTE:** Each adjustment request is accompanied by a single adjustment outcome.

## Viewing Outcomes of Payment Plan Requests

To view a payment arrangement for an account adjustment request, follow this procedure.

### *To view a payment arrangement plan outcome*

- 1 Navigate to the Credit Management screen, then the Credit Alert List view.
- 2 Drill down on the alert number of the credit alert.
- 3 Click the Payment Arrangements view tab.
- 4 Scroll down to the Payment Arrangements Outcome form to view the response of the credit management application to the adjustment request.

Some of the fields are described in the following table.

Field	Comments
Installment Amount	Displays the payment amount for each installment. This amount can apply to a single payment or multiple installments.
Interest Charge	Displays the Interest owed on the payment arrangement plan. This amount is calculated by the back-office application.
# of Installments	Displays the number of installments.
Plan Type	Displays the type of payment arrangement plan.
Status	Displays the outcome of the request for the payment arrangement plan.
Total Amount Due	Displays the total owed, including accrued interest.

## Recording Customer Decisions About Account Adjustments or Payment Plans

End users can record the customer's decision about the outcome.

This task is a step in [“Process of Creating Account Adjustments or Payment Plans in Siebel Energy \(End User\)”](#) on page 235.

## Recording Customer Decisions About Account Adjustments

To record a customer’s decision about an account adjustment outcome, follow this procedure.

### *To record the customer’s decision about an account adjustment outcome*

- 1 Navigate to the Credit Management screen, then the Credit Alert List view.
- 2 Drill down on the alert number of the credit alert.
- 3 Click the Account Adjustments view tab.
- 4 In the Account Adjustments list, enter information in the Customer Decision and Customer Decision Date fields.

**NOTE:** If your company’s policy does not require a customer decision regarding an account adjustment outcome, then the customer decision fields might not appear in Siebel Energy.

- 5 If the customer rejects the outcome, then discuss the options again and submit another request.

## Recording Customer Decisions About Payment Plans

To record a customer’s decision about a payment arrangement outcome, follow this procedure.

### *To record the customer’s decision about a payment arrangement outcome*

- 1 Navigate to the Credit Management screen, then the Credit Alert List view.
- 2 Drill down on the alert number of the credit alert.
- 3 Click the Payment Arrangements view tab.
- 4 Scroll down to the Payment Arrangements Outcome form, and enter information in the Customer Decision and Customer Decision Date fields.

**NOTE:** If your company’s policy does not require a customer decision regarding an account adjustment outcome, then the customer decision fields might not appear in Siebel Energy.

- 5 If the customer rejects the outcome, then discuss the options again and submit another request.

# Closing a Credit Alert Manually in Siebel Energy (End User)

After an outcome has been received and accepted (if necessary), you can close the credit alert manually in Siebel Energy.

*To close a credit alert manually*

- 1 Navigate to the Credit Management screen, then the Credit Alert List view.
- 2 Drill down on the alert number of the credit alert.
- 3 In the Action Type field, select a value of Payment Arrangement Agreed.
- 4 In the Status field, select a value of Closed.

## **Additional End-User Tasks for Credit Management in Siebel Energy**

For information about other tasks related to credit management, see *Siebel Field Service Guide* and *Siebel Applications Administration Guide*.

### **Financial Information Checks**

Look at customer financial information, including bills and credit rating data, that might be useful in resolving credit alerts. For information about checking customer financial information, see [“About Financial Profiles in Siebel Energy” on page 63](#).



# 17 Fraud Management in Siebel Energy

This chapter describes the procedures for managing and responding to fraud alerts. It includes the following topics:

- [“About Fraud Management in Siebel Energy” on page 241](#)
- [“Scenario for Using Fraud Management in Siebel Energy” on page 242](#)
- [“Viewing Fraud Alerts in Siebel Energy \(End User\)” on page 243](#)
- [“About Following Up with the Customer for a Fraud Alert” on page 245](#)
- [“Changing Fraud Thresholds in Siebel Energy \(End User\)” on page 245](#)
- [“Updating the Fraud Alert in Siebel Energy \(End User\)” on page 245](#)
- [“Additional End-User Tasks for Fraud Management in Siebel Energy” on page 246](#)

## About Fraud Management in Siebel Energy

*Fraud* occurs when someone uses a service to defraud a consumer, business, or service provider by obtaining free services or services that the individual concerned is not entitled to. Some of the more common methods and indicators of fraud follow:

- Illegal tapping of utility service points.
- Bills returned in the mail with a claim that the customer is not at that address.

Fraud can be identified in various ways. For example, a consumer might identify fraud on a bill, noting charges for services that were not requested or used. Alternatively, a service provider might identify irregular usage patterns that can indicate fraud.

Traditionally, companies have used legacy fraud management applications to identify and manage fraud. The fraud management process involves *fraud alerts*, warnings that a fraud might have been committed, which are generated by the fraud management application from an analysis of usage details.

A fraud alert can also be generated by a breach of a fraud threshold. A *fraud threshold* is a value which, when exceeded, produces a fraud alert.

The back-office application issues a fraud alert by placing the customer on a *fraud list*, a list of customer accounts that are suspected of or confirmed for fraud. The back-office application might generate multiple lists, classified by categories in descending order of the likelihood of fraud.

A back-office fraud management application usually has a front-office component, which is used to manage customer interactions related to fraud. Siebel Energy functions as the front-office application for managing fraud. Your company's back-office fraud management applications send fraud lists to Siebel Energy for follow-up. Customer service representatives (CSRs) go through the lists and contact the customers to check if they used the services that are the cause of the fraud alerts.

Fraud alerts indicate the type of fraud that might have occurred. For example, Exceeds Threshold is a fraud alert type that indicates that a predefined limit has been exceeded.

To help you resolve cases of suspected or obvious fraud, Siebel Energy allows you to view fraud lists, fraud alerts, fraud-related background information about accounts, and the history of fraud-related activities for an account.

## Scenario for Using Fraud Management in Siebel Energy

This topic gives one example of how fraud management might be used. You might use fraud management differently, depending on your business model.

A CSR is responsible for handling fraud issues for your residential customers. A customer has a contract for residential electric and gas services.

Your fraud management application finds that the meter readings at the customer's location show typical gas usage but no electricity usage. Such a pattern can mean a problem with the electric meter, a theft of energy, or a gas leak in an unoccupied residence. The fraud management application generates a fraud alert for the customer's account, with the fraud level set to Suspected, fraud type set to Theft, and fraud event set to No Electric Usage. The fraud message is forwarded to Siebel Energy. Through integration with the third-party application, the fraud data is sent to the CSR's Siebel application, and the account is flagged as fraudulent. The Siebel application creates a fraud alert and fraud alert details and updates the customer account with the fraud level.

Siebel Energy has been configured to generate an activity to contact the customer. The fraud alert appears in the customer service supervisor's queue by default, and the supervisor assigns the fraud alert to the CSR, who examines the fraud alert. The CSR also checks for any other fraud alerts raised against the account in the last 12 months to see whether it has a history of fraud. This credit alert is the first fraud alert against the account.

The CSR looks up contact information for the customer's account in Siebel Energy and telephones the customer, intending to ask if the premises are occupied. The person who answers the phone is hesitant and claims that the premises are infrequently occupied. The CSR suspects that this situation is a case of electricity theft. The CSR updates the fraud alert's status and attaches appropriate comments.

Siebel Energy transmits this information to the fraud management application. The CSR's fraud management department then starts its formal investigation and dispatches a field service agent to the premises location.

Figure 24 shows a possible sequence for managing fraud.

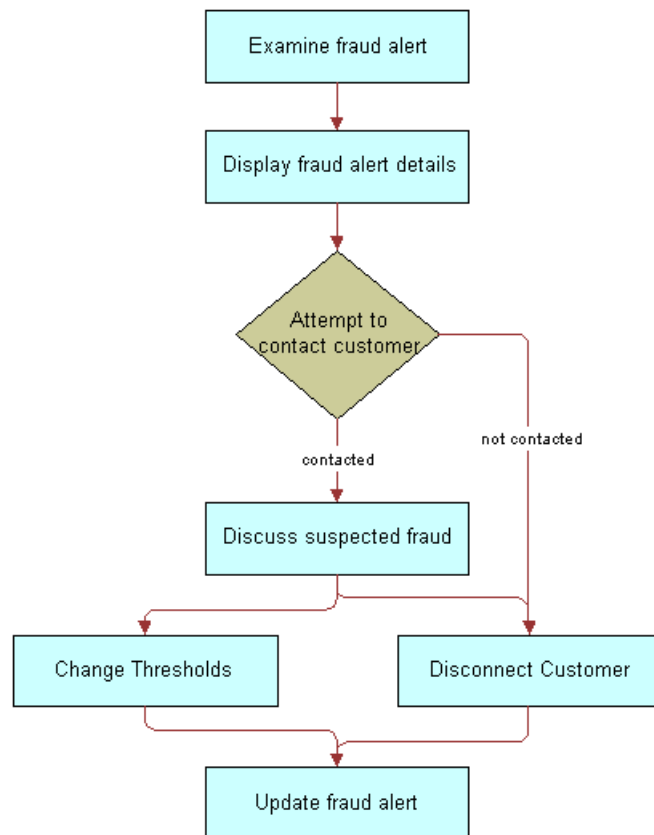


Figure 24. Example of Sequence for Fraud Management

## Viewing Fraud Alerts in Siebel Energy (End User)

When a back-office application flags an account for fraud, Siebel Energy receives a fraud alert and fraud alert details.

In the course of investigating fraud, end users review the fraud alert to determine the type of fraud that might have occurred. End users then discuss the fraud alert details, which contain the specific data alleged to be fraudulent, with the customer.

### Viewing Fraud Alerts

To view a fraud alert, follow this procedure.

**To view a fraud alert**

- 1 Navigate to the Fraud Management screen, then the Fraud Alert List view.

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

Field	Comments
Fraud Event	Displays the condition that indicates suspected fraud. The value in this field depends on the value in the Fraud Type field.
Alert #	Displays an alert number that is automatically generated.
Threshold Overflow	Displays the quantity by which the account’s threshold level is exceeded.
Owner	Displays the primary person assigned to this account for fraud management purposes. This person is responsible for customer follow-up to determine whether fraud occurred.

- 2 Drill down on the alert number of the fraud alert.

**Viewing Fraud Alert Details**

To view fraud alert details, follow this procedure.

**To view fraud alert details**

- 1 Navigate to the Fraud Management screen, then the Fraud Alert List view.
- 2 Drill down on the alert number of the fraud alert.
- 3 Click the Event Details view tab.

An Account form appears with the Event Details list beneath it. The Event Details list displays detailed information about the selected alert. This information typically includes the call detail records associated with the suspected fraudulent calls. Some fraud alerts might have no associated fraud alert details.

Some fields in the Event Details list are described in the following table.

Field	Comments
Number Location	Displays the geographical location of the number dialed in a suspected fraudulent call.
Date/Time	Displays the date and time of the event.
Number Called	Displays the number dialed in a suspected fraudulent call.
Length	Displays the length of the service in seconds.

Field	Comments
Rate	Displays the name of the rate plan used to calculate the charge (for example, Peak, Off-Peak, Standard, Economy, or International).
Charge	Displays the charges for the service from the Charge dialog box.

## About Following Up with the Customer for a Fraud Alert

End users might establish contact with the customer. Your company might have a business rule that determines how many times end users must attempt to contact the customer.

If repeated attempts to contact the customer fail, then end users can disconnect the customer's service. Your company can configure Siebel Energy to send a message to this effect to the back-office application. Workflow Manager or a VB script might be used for this configuration.

## Changing Fraud Thresholds in Siebel Energy (End User)

End users can change thresholds in the fraud profile, if necessary. For example, if a breach of a credit threshold generated the fraud alert, then the customer can request a higher threshold. If this request is granted, then it might cancel the fraud alert.

### *To change a fraud threshold*

- 1 Navigate to the Fraud Management screen, then the Fraud Alert List view.
- 2 Drill down on the account name of the fraud alert.
- 3 In the Fraud Account Profile form, change one or more of the fields.

For information about the fields in the Fraud Account Profile form, see [Chapter 4, "Profiles in Siebel Energy."](#)

## Updating the Fraud Alert in Siebel Energy (End User)

End users can indicate that some action has been taken by adding comments or by changing other fields in the fraud alert record, such as its status, priority, or owner.

### *To update a fraud alert*

- 1 Navigate to the Fraud Management screen, then the Fraud Alert List view.
- 2 Select a fraud alert record.

- 3 In the Fraud Alert record, complete the necessary fields.

## Additional End-User Tasks for Fraud Management in Siebel Energy

This topic contains information about another task related to fraud management.

### Disconnecting Service

If necessary, end users can disconnect a customer's service because of the nature of the alert, a discussion with the customer, failure to contact the customer, or the company's policy. Depending on the severity of the alert, part or all of the customer's services might already have been disconnected by the back-office application.

If your company has configured the Fraud Activities types to include Service Disconnect, then end users can add this activity to a fraud alert. For information about disconnecting a service, see *Siebel Order Management Guide Addendum for Communications*.

# 18 Defining Integration Workflows for Siebel Energy

This chapter explains integration using prebuilt sample workflows that might be provided with your Siebel application or that might be available on request. It includes the following topics:

- [“About Integration Workflows in Siebel Energy” on page 247](#)
- [“Terminology for Integration Workflows in Siebel Energy” on page 248](#)
- [“Sample Integration Workflows for Siebel Energy” on page 248](#)
- [“Sample Integration Workflow: CUT Send Account Data” on page 255](#)
- [“Sample Integration Workflow: CUT Get Account Data” on page 256](#)
- [“Sample Integration Workflow: CUT Receive Account Data” on page 257](#)
- [“Workflows for Oracle Utilities Customer Care and Billing Integration” on page 258](#)

## About Integration Workflows in Siebel Energy

A *workflow process* is a sequence of steps that automates a business function. Some workflow processes (also known as business processes) allow your company to integrate Siebel Energy with back-office applications and databases. You can implement integration with third-party applications by using the following resources and techniques:

- **Prebuilt workflows.** Some prebuilt workflow processes are included in the sample database distributed with Siebel Energy, along with prebuilt integration objects in the Siebel Tools repository. If a workflow process mentioned in this chapter is not in your Siebel application’s sample database, then it might be available on request. For help with requesting a workflow process, contact your Oracle sales representative to request assistance from Oracle’s Professional Services.
- **Manual integration.** Your company can automate the integration between Siebel Energy and other applications manually. To automate the integration between Siebel Energy and other applications manually, you normally use both Oracle’s Siebel Business Process Designer and Siebel Enterprise Application Integration (Siebel EAI).

**NOTE:** Triggers for some business processes (for example, a button-push or workflow policy) are defined during implementation of the workflow process.

This chapter covers the following subjects:

- Information about how sample integration workflow processes can be used to automate or partially automate a business process.
- Descriptions of sample integration workflow processes that are available in the Siebel Energy sample database.

- Details of sample workflow processes to help you understand how a workflow process is set up. Refer to these samples when you design your own integration workflow processes.

You can automate business processes using workflow processes in combination with Business Process Administration. This chapter does not give detailed information about Business Process Administration or application integration in general. For information about these topics, see *Siebel Business Process Framework: Workflow Guide* and the Siebel Enterprise Application Integration (Siebel EAI) guides, available on the *Siebel Bookshelf*.

**NOTE:** The integration workflow processes discussed in this chapter are not Application Services Interfaces (ASIs), although they serve a similar function.

## Terminology for Integration Workflows in Siebel Energy

This topic describes some terms used in this chapter in the context of workflow processes.

**Siebel EAI.** Siebel Enterprise Application Integration (Siebel EAI) is a set of tools, technologies, and prebuilt functional integrations that facilitate application integration. It supports message-based integration with external applications. Using Oracle's Siebel Enterprise Application Integration (Siebel EAI) module, a service provider can connect Siebel Energy directly to another application within the operational support architecture or connect to a hub or queue. This process allows middleware vendors to build their own Siebel-to-third-party connectors.

**NOTE:** Integration with specific back-office applications or middleware packages is performed by your company. Siebel Business Applications offer prebuilt connectors to some back-office applications.

**Integration Objects.** Integration objects define the content of the messages that are initiated or received by Siebel Energy. They are based on business objects. The repository stores both integration objects and the mapping between business objects and integration objects.

**Business Services.** Business services act on objects to move data, convert data formats, and perform calculations. The Siebel Energy repository contains some business services that specifically help with integration tasks. You can also build your own in Siebel Tools (at design time) or in the Siebel Web client (at run time).

**Workflow Processes.** Workflow processes are sequences of steps that are used by Business Process Administration to automate a business function. Workflow process steps call business services that perform the procedures needed to perform a business process.

## Sample Integration Workflows for Siebel Energy

This topic describes the sample integration workflow processes.

**NOTE:** Sample workflows must be imported into your database. For information about importing these workflows, see *Siebel Business Process Framework: Workflow Guide*.



Some workflow process steps call other workflow processes. For example, the first step of the CUT Send Account Data workflow process calls the CUT Get Account Data workflow process. In this example, the CUT Get Account Data workflow process is a subprocess of the CUT Send Account Data workflow process.

Some sample workflow processes communicate using the EAI MQSeries Transport business service. If your company does not use MQ Series, then you can replace the appropriate step with one that uses either a custom transport business service, the provided HTTP business service, or the provided XML file business service. Business services are located in the Oracle's Siebel Tools repository and are available for use when defining workflow processes.

The integration objects used in the samples follow:

- CUT Sample Account IO
- CUT Sample Asset IO
- CUT Sample Credit Alert IO
- CUT Sample Fraud Alert IO
- CUT Sample Sales Order IO
- CUT Sample Service Profile IO
- CUT Sample Trouble Ticket IO
- CUT Sample Work Order IO

**NOTE:** The Integration Object mentioned in this topic is specified in XML. It is not specified as a Business Service Input Argument.

## CUT Send Account Data Workflow

This workflow sends to back-office applications the customer account data that end users create or modify in Siebel Energy.

**Workflow Description.** This workflow performs the following actions:

- 1 **Get Account Data.** This step invokes the CUT Get Account Data subprocess. For more information, see ["CUT Get Account Data Workflow" on page 249](#).
- 2 **Send Account Data.** This step invokes the EAI MQSeries Server Transport business service.

## CUT Get Account Data Workflow

This workflow retrieves account data from Siebel Energy to respond to a request from an external application. The external application calls the CUT Send Account Data workflow using the available Siebel object interfaces. The CUT Send Account Data workflow calls this workflow. The external application retrieves the data from Siebel Energy, using this workflow as an API.

**Workflow Description.** This workflow performs the following actions:

- 1 **Get Account Data.** This step uses the Query method of the EAI Siebel Adapter business service and the CUT Sample Account IO.

- 2 Convert to XML.** This step uses the Integration Object Hierarchy to XML Document method of the EAI XML Converter business service.

## CUT Receive Account Data Workflow

This workflow receives customer account data that is modified in a back-office application because the data must be updated in Siebel Energy.

**Workflow Description.** This workflow performs the following actions:

- 1 Receive Account Update.** This step uses the Receive method of the EAI MQSeries Server Transport business service.
- 2 Convert to Internal.** This step uses the XML Document to Integration Hierarchy method of the EAI XML Converter business service.
- 3 Update Account.** This step uses the Insert or Update method of the EAI Siebel Adapter business service.

## CUT Send Service Profile Data Workflow

This workflow synchronizes the service profile data that end users create or modify in Siebel Energy with the service profile data in back-office applications.

**Workflow Description.** This workflow performs the following actions:

- 1 Get Service Profile Data.** This step invokes the CUT Get Service Profile Data subprocess. For more information, see [“CUT Get Service Profile Data Workflow” on page 250](#).
- 2 Send Service Profile Data.** This step uses the EAI MQSeries Server Transport business service.

## CUT Get Service Profile Data Workflow

This workflow retrieves service profile data from Siebel Energy to respond to a request from an external application. The external application calls the CUT Send Service Profile Data workflow using the available Siebel object interfaces. The CUT Send Service Profile Data workflow calls this workflow. The external application retrieves the data from Siebel Energy, using this workflow as an API.

**NOTE:** A service profile contains the same information in the Installed Assets view of the Accounts screen.

**Workflow Description.** This workflow performs the following actions:

- 1 Get Service Profile Data.** This step uses the Query method of the EAI Siebel Adapter business service and the CUT Sample Service Profile IO.
- 2 Convert to XML.** This step uses the Integration Object Hierarchy to XML Document method of the EAI XML Converter business service.

## CUT Receive Service Profile Data Workflow

This workflow synchronizes service profile data that end users create or modify in an external application with the service profile data in Siebel Energy.

**Workflow Description.** This workflow performs the following actions:

- 1 Receive Service Profile Update.** This step uses the Receive method of the EAI MQSeries Server Transport business service.
- 2 Convert to Internal.** This step uses the XML Document to Integration Hierarchy method of the EAI XML Converter business service.
- 3 Update Service Profile.** This step uses the Insert or Update method of the EAI Siebel Adapter business service.

## CUT Send Sales Order Data Workflow

This workflow sends to back-office applications the sales order data that end users create in Siebel Energy.

**Workflow Description.** This workflow performs the following actions:

- 1 Get Sales Order Data.** This step invokes the CUT Get Sales Order Data subprocess. For more information, see [“CUT Get Sales Order Data Workflow” on page 251](#).
- 2 Send Sales Order Data.** This step uses the EAI MQSeries Server Transport business service.

## CUT Get Sales Order Data Workflow

This workflow retrieves sales order data from Siebel Energy to respond to a request from an external application. The external application calls this workflow using the available Siebel object interfaces. The external application retrieves the data from Siebel Energy directly, using this workflow as an API.

**Workflow Description.** This workflow performs the following actions:

- 1 Get Sales Order Data.** This step uses the Query method of the EAI Siebel Adapter business service and the CUT Sample Sales Order IO.
- 2 Convert to XML.** This step uses the Integration Object Hierarchy to XML Document method of the EAI XML Converter business service.

## CUT Receive Sales Order Data Workflow

This workflow receives sales order data that is modified in a back-office application because the data must be updated in Siebel Energy.

**Workflow Description.** This workflow performs the following actions:

- 1 Receive Sales Order Update.** This step uses the Receive method of the EAI MQSeries Server Transport business service.
- 2 Convert to Internal.** This step uses the XML Document to Integration Hierarchy method of the EAI XML Converter business service.

- 3 Update Sales Order.** This step uses the Insert or Update method of the EAI Siebel Adapter business service.

### CUT Send Work Order Data Workflow

This workflow sends to back-office applications the work order data that end users create in Siebel Energy.

**Workflow Description.** This workflow performs the following actions:

- 1 Get Work Order Data.** This step invokes the CUT Get Work Order Data subprocess. For more information, see [“CUT Get Work Order Data Workflow” on page 252](#).
- 2 Send Work Order Data.** This step uses the EAI MQSeries Server Transport business service.

### CUT Get Work Order Data Workflow

This workflow retrieves work order data from Siebel Energy to respond to a request from an external application. The external application calls this workflow using the available Siebel object interfaces. The external application retrieves the data from Siebel Energy directly, using this workflow as an API.

**Workflow Description.** This workflow performs the following actions:

- 1 Get Work Order Data.** This step uses the Query method of the EAI Siebel Adapter business service and the CUT Sample Work Order IO.
- 2 Convert to XML.** This step uses the Integration Object Hierarchy to XML Document method of the EAI XML Converter business service.

### CUT Receive Work Order Data Workflow

This workflow receives work order data that is modified in a back-office application because the data must be updated in Siebel Energy.

**Workflow Description.** This workflow performs the following actions:

- 1 Receive Work Order Update.** This step uses the Receive method of the EAI MQSeries Server Transport business service.
- 2 Convert to Internal.** This step uses the XML Document to Integration Hierarchy method of the EAI XML Converter business service.
- 3 Update Work Order.** This step uses the Insert or Update method of the EAI Siebel Adapter business service.

## CUT Send Trouble Ticket Data Workflow

This workflow sends to back-office applications the trouble ticket data that customers create through a Siebel Energy customer application or through a phone call to a CSR.

**NOTE:** Customers have different requirements, and only certain types of trouble tickets must be sent to back-office applications. Some trouble tickets can be managed entirely within Siebel Energy. The supporting integration process is designed for trouble tickets that are sent to the back office. During implementation of a workflow process, the trigger must be implemented in such a way that the workflow process is invoked only for trouble tickets that are sent to the back office.

**Workflow Description.** This workflow performs the following actions:

- 1 Get Trouble Ticket Data.** This step invokes the CUT Get Trouble Ticket Data subprocess. For more information, see [“CUT Get Trouble Ticket Data Workflow” on page 253](#).
- 2 Send Trouble Ticket Data.** This step uses the EAI MQSeries Server Transport business service.

## CUT Get Trouble Ticket Data Workflow

This workflow retrieves trouble ticket data from Siebel Energy to respond to a request from an external application. The external application calls this workflow using the available Siebel object interfaces. The external application retrieves the data from Siebel Energy directly, using this workflow as an API.

**Workflow Description.** This workflow performs the following actions:

- 1 Get Trouble Ticket Data.** This step uses the Query method of the EAI Siebel Adapter business service and the CUT Sample Trouble Ticket IO.
- 2 Convert to XML.** This step uses the Integration Object Hierarchy to XML Document method of the EAI XML Converter business service.

## CUT Receive Trouble Ticket Data Workflow

This workflow creates a trouble ticket in a back-office application and sends it to Siebel Energy. Updates to trouble tickets stored in a back-office application are communicated to Siebel Energy in the same way, allowing CSRs to see the latest information about externally generated trouble tickets.

**Workflow Description.** This workflow performs the following actions:

- 1 Receive Trouble Ticket Update.** This step uses the Receive method of the EAI MQSeries Server Transport business service.
- 2 Convert to Internal.** This step uses the XML Document to Integration Hierarchy method of the EAI XML Converter business service.
- 3 Update Trouble Ticket.** This step uses the Insert or Update method of the EAI Siebel Adapter business service.

## CUT Receive Fraud Alert Data Workflow

This workflow creates a fraud alert record in a back-office application and sends it to Siebel Energy. Updates to fraud alert information stored in the back-office application are communicated to Siebel Energy in the same way, allowing CSRs to see the latest information about externally generated alerts.

**Workflow Description.** This workflow performs the following actions:

- 1 Receive Fraud Alert Update.** This step uses the Receive method of the EAI MQSeries Server Transport business service.
- 2 Convert to Internal.** This step uses the XML Document to Integration Hierarchy method of the EAI XML Converter business service.
- 3 Update Fraud Alert.** This step uses the Insert or Update method of the EAI Siebel Adapter business service.

## CUT Receive Credit Alert Data Workflow

This workflow creates a credit alert record in a back-office application and sends it to Siebel Energy. Updates to credit alert information stored in the back-office application are communicated to Siebel Energy in the same way, allowing CSRs to see the latest information about externally generated alerts.

**Workflow Description.** This workflow performs the following actions:

- 1 Receive Credit Alert Update.** This step uses the Receive method of the EAI MQSeries Server Transport business service.
- 2 Convert to Internal.** This step uses the XML Document to Integration Hierarchy method of the EAI XML Converter business service.
- 3 Update Trouble Ticket.** This step uses the Insert or Update method of the EAI Siebel Adapter business service.

## CUT Send Phone Number Data Workflow

This workflow sends to back-office applications the phone number data that end users create in Siebel Energy.

**Workflow Description.** This workflow performs the following actions:

- 1 Get Phone Number Data.** This step invokes the CUT Get Phone Number Data subprocess. For more information, see [“CUT Get Phone Number Data Workflow” on page 254](#).
- 2 Send Phone Number Data.** This step uses the EAI MQSeries Server Transport business service.

## CUT Get Phone Number Data Workflow

This workflow retrieves phone number data from Siebel Energy to respond to a request from an external application. The external application calls this workflow using the available Siebel object interfaces. The external application retrieves the data from Siebel Energy directly, using this workflow as an API.

**Workflow Description.** This workflow performs the following actions:

- 1 **Get Phone Number Data.** This step uses the Query method of the EAI Siebel Adapter business service and the CUT Sample Asset IO.
- 2 **Convert to XML.** This step uses the Integration Object Hierarchy to XML Document method of the EAI XML Converter business service.

## CUT Receive Phone Number Data Workflow

This workflow receives phone number data that is modified in a back-office application because the data must be updated in Siebel Energy.

**Workflow Description.** This workflow performs the following actions:

- 1 **Receive Phone Number Update.** This step uses the Receive method of the EAI MQSeries Server Transport business service.
- 2 **Convert to Internal.** This step uses the XML Document to Integration Hierarchy method of the EAI XML Converter business service.
- 3 **Update Phone Number.** This step uses the Insert or Update method of the EAI Siebel Adapter business service.

# Sample Integration Workflow: CUT Send Account Data

This topic examines a send-type sample workflow process to help you understand how the workflow process is set up.

This sample workflow process sends an XML string, created from an account record, to an IBM MQSeries queue. For more information about profiles, see [Chapter 4, “Profiles in Siebel Energy.”](#)

[Figure 25](#) shows this workflow.

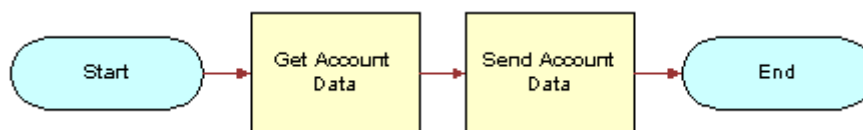


Figure 25. CUT Send Account Data Workflow

**Workflow Description.** This workflow performs the following actions:

- 1 **Get Account Data.** This step invokes the Get Account Data subprocess. For more information about this workflow, see [“Sample Integration Workflow: CUT Get Account Data” on page 256.](#)

- 2 Send Account Data.** This step invokes the EAI MQSeries Server Transport business service to put the XML message onto the MQSeries queue, called Employee. The message is represented by the Message Text argument.

The Queue Manager Name and Physical Queue Name are defined during the MQSeries setup. The Account XML message is sent to the queue specified by the Physical Queue Name property, which is managed by the queue manager specified in the Queue Manager Name property.

### CUT Send Account Data Workflow Properties

Properties that apply to all steps of a workflow process are called *workflow process properties*. These properties apply to all workflow processes. These properties follow:

- Error Message
- Error Code
- Object Id
- Siebel Operation Object Id

The CUT Send Account Data workflow has the following additional properties:

- **Account XML.** Specifies the Siebel object that has been converted to XML.
- **Input: Siebel Int Object Name.** Specifies the input Integration Object used in send workflows.
- **Process Instance Id.** Specifies the process instance and is automatically populated when a process is executed and persistence is enabled.

## Sample Integration Workflow: CUT Get Account Data

The sample workflow subprocess retrieves account data.

Figure 26 shows this subprocess.

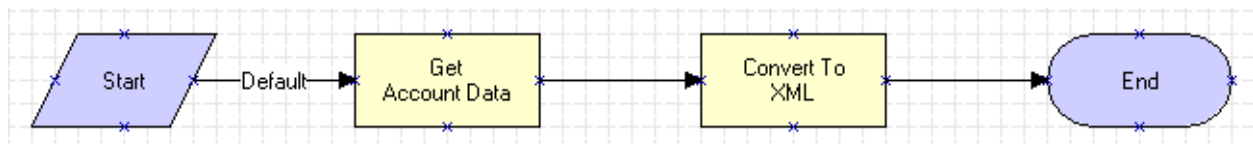


Figure 26. CUT Get Account Data Subprocess Workflow

**Workflow Description.** This workflow performs the following actions:



- 1 **Get Account Data.** This step uses the query method of the EAI Siebel Adapter business service to get an instance of an account record from the Siebel database. The CUT Sample Account IO describes the structure of the Account business object and was created using the Integration Object Builder. The other part of the query criteria is the Object Id, which is a process property that contains the row ID for the account in the sample DB.

**NOTE:** The CUT Sample Account IO value is actually specified as a process property that is used as the input argument for the process step.

- 2 **Convert to XML.** This step uses the Integration Object Hierarchy to XML Document method of the Siebel EAI XML Converter business service to convert the outbound Siebel Message to XML and store it in the Account XML output argument.

## Sample Integration Workflow: CUT Receive Account Data

This topic examines a receive-type sample workflow process to help you understand how the workflow process is set up.

This sample workflow process receives an XML string from an IBM MQSeries queue and updates the Account instance in the Siebel database.

Figure 27 shows this workflow.

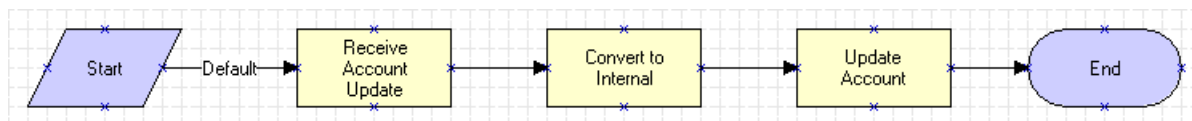


Figure 27. CUT Receive Account Data Workflow Process

**Workflow Description.** This workflow performs the following actions:

- 1 **Receive Account Update.** This step uses the Receive method of the EAI MQSeries Server Transport business service to retrieve the inbound message from the Account physical queue. This queue is named in the Physical Queue Name argument.  
  
In this case, the output from the receive step is put into the Account XML process property. The assumption is that the inbound message is already in XML format.
- 2 **Convert to Internal.** This step uses the XML Document to Integration Object Hierarchy method of the Siebel EAI XML Converter business service to convert the inbound message to the Siebel business object format.  
  
The output argument from this step is stored in the Account Message process property, in the Siebel Message format.
- 3 **Update Account.** This step uses the Insert or Update method of the EAI Siebel Adapter business service to perform the updating task. The EAI Siebel Adapter business service checks the Siebel database for an Account record that matches the current instance of Account in the Account Message property, and completes the following actions:

- If an Account record matching the current instance does not appear in the database, then the adapter inserts the record into the database.
- If an Account record in the database matches the current instance, then the adapter updates the record with the instance.

## CUT Receive Account Data Workflow Properties

Set workflow process properties when you need a property to be true for the entire workflow. For example, the CUT Receive Account Data workflow process has five properties. The Error Message, Error Code, Object Id, and Siebel Operation Object Id properties are included in each workflow process by default. The Account XML property defines the MQSeries message as XML recognizable by Oracle's Siebel Business Applications.

The CUT Receive Account Data workflow process has the following additional properties:

- **Account Message.** Contains the object in its Siebel Energy hierarchical format when converted. It must be in this format before it can be inserted or updated in Siebel Energy.
- **Account XML.** Specifies the Siebel object that has been converted to XML.
- **Process Instance Id.** Specifies the process instance and is automatically populated when a process is executed and persistence is enabled.

# Workflows for Oracle Utilities Customer Care and Billing Integration

This topic describes the workflows that support the integration of Siebel Energy with Oracle Utilities Customer Care and Billing. By modifying these workflows, you can configure Siebel Energy functionality according to the business requirements of your company. For more information about workflows and about customizing workflows, see *Siebel Business Process Framework: Workflow Guide*.

This topic describes the following workflows:

- ["SWI Statement Profile Update Workflow" on page 258](#)
- ["SISOMBillingSubmitOrderWebService Workflow" on page 259](#)

## SWI Statement Profile Update Workflow

This workflow calls the SyncCustomerSiebelEventAggregator outbound Web service to synchronize the statement profile details from the Siebel application with the external application. It is called when a change is made to the statement profile details.

Figure 28 shows this workflow.

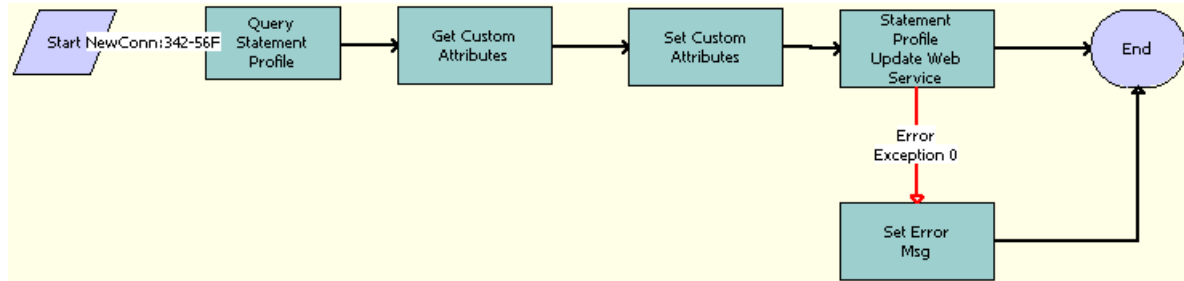


Figure 28. SWI Statement Profile Update Workflow

**Workflow Description.** This workflow performs the following actions:

- 1 **Query Statement Profile.** Queries for the Statement Profile Id of a statement profile in which a change has been made. Derives the value of the UTCCanonical input parameter for this step from the UTCCanonical process property. The default value of this property is N. If the value passed is Y, then the query returns data for any field of the type DTYPE\_UTCDATETIME in UTC Canonical format.
- 2 **Get Custom Attributes.** Gets the language and locale details for the Siebel Enterprise Server.
- 3 **Set Custom Attributes.** Sets the Siebel Enterprise Server details, such as the language and locale values, in the request message to make an outbound Web service call.
- 4 **Statement Profile Update Web Service.** Calls the aggregatespevent method of the SyncCustomerSiebelEventAggregator business service and updates the statement profile of the customer record. If the response received contains an error, then the workflow proceeds to the Set Error Msg step.
- 5 **Set Error Msg.** If an error occurs in [Step 4](#), then this step displays an error message.

**Associated Business Service Methods.** The following table shows the steps in this workflow that call business service methods.

Workflow Step	Method Called	In Business Service
Statement Profile Update Web Service	aggregatespevent	SyncCustomerSiebelEventAggregator
Set Error Msg	CheckAndSetError	SWI External Integration Service

## SI SOMBillingSubmitOrderWebService Workflow

This workflow submits an order from the Siebel application to the billing application and creates a new account, if needed, in the billing application. This workflow is called when a user clicks Submit on the order header of the Sales Orders screen.

Figure 29 shows this workflow.

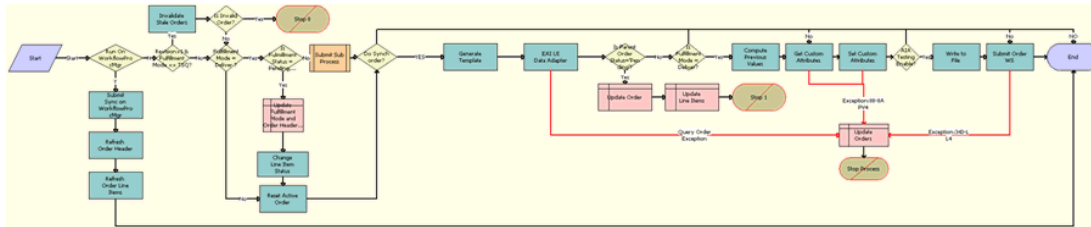


Figure 29. SISOMBillingSubmitOrderWebService Workflow

**Workflow Description.** This workflow performs the following actions:

- 1 **Run On WorkflowProcMgr.** Checks the setting of the RunOnWorkflowProcMgr process property. By default, the RunOnWorkflowProcMgr process property is set to N. If this property is set to Y, then this step calls [Step 2](#), which runs the workflow on the WorkflowProcMgr object manager. If this property is set to N, then the workflow proceeds to [Step 5](#) and runs on the current object manager.
- 2 **Submit Sync on WorkflowProcMgr.** Calls the workflow recursively with the RunOnWorkflowProcMgr process property set to N, so that the workflow goes through the normal process.
- 3 **Refresh Order Header.** Refreshes the order header to reflect the status and other changes after submission.
- 4 **Refresh Order Line Items.** Refreshes the order line items to reflect the status and other changes after submission and ends the workflow.
- 5 **Revision > 1 & Fulfillment Mode <> TSQ?** Checks whether the Order Revision number is greater than 1. If the Order Revision number is greater than 1, then this step checks whether this order is valid.
- 6 **Invalidate Stale Orders.** If the Order Revision number is greater than 1, then this step calls the InValidateStaleOrders method, which checks whether one or more Previous Line Items of the Line Items of the current order has reached the Point of No Return. If one or more Previous Line Items have reached Point of No Return, then Siebel Energy displays an error message and prevents the user from submitting the current order.
- 7 **Is Invalid Order?** Checks whether the Fulfillment Mode is Cancel. Depending on the result, this step takes one of the following actions:
  - If the Fulfillment Mode is Cancel, then this step determines that the order is already submitted for cancellation and resets the active order.
  - If the Fulfillment Mode is not Cancel, then this step submits the order and calls the SIS OM Submit Order Process workflow. For more information about the SIS OM Submit Order Process workflow, see *Siebel Order Management Guide*.
- 8 **Stop 0.** Displays an error message if the user attempts to submit a sales order before the user submits the parent order.

- 9 **Is Fulfillment Status = Pending, Passed or Failed TSQ?** Checks for the Fulfillment Status Code values Pending TSQ, Passed TSQ, and Failed TSQ. Also checks to see whether the Order Status value is not equal to Open. If both conditions are true, then proceeds to [Step 10](#).
- 10 **Update Fulfillment Mode and Order Header Status.** Sets the value of the Fulfillment Status to Deliver, and sets the Status of the order to Open.
- 11 **Change Line Item Status.** Sets the Status of each line item to Open.
- 12 **Reset Active Order.** Resets the Active Order so that the current order is no longer the active order.
- 13 **Do Synch order?** Checks whether the Enable AIA Comms system preference is set to True, or whether Enable AIA Utility is set to True.
- 14 **Is Fulfillment Mode = Deliver?** Checks whether the Fulfillment Mode is Deliver. If the value matches, then only [Step 20](#) is run.
- 15 **Query Order.** Derives the value for the UTCCanonical input parameter of this step from the value of the UTCCanonical process property. The default value for this process property is N.
- 16 **Is Parent Order Status = Pending?** Validates that the status of the parent order is Pending to determine whether the parent order is submitted before the child order (Submitted Order).
- 17 **Update Order.** Updates the Status of the submitted order to Pending if [Step 16](#) returns a value of Yes.
- 18 **Update Line Items.** If the parent order is not submitted, then this step updates the status of the corresponding order line item to Pending.
- 19 **Is Fulfillment Mode = Deliver?** Checks whether the Fulfillment Mode is Deliver. If the Fulfillment Mode is Deliver, then only [Step 20](#) is run.
- 20 **Compute Previous Values.** Derives the value of the UTCCanonical input parameter for this step from the UTCCanonical process property. The default value of this process property is N.  

The behavior of the workflow depends on the value of the UTCCanonical process property. If the value is N, then the workflow converts the date values of the Sales Order to UTC and Canonical format. To change this behavior, you can change the default value for the UTCCanonical process property in this workflow to Y.

**NOTE:** Previous values are computed when an order is modified from an asset, and during the change order process. Previous values are not computed for revision orders.
- 21 **Get Custom Attributes.** Reads the enterprise details, such as the Siebel Enterprise Server name, language, and locale.
- 22 **Set Custom Attributes.** Sets the enterprise details as part of the request message.
- 23 **AIA Testing Enable?** Checks whether the Enable AIA Testing system preference is set to True.
- 24 **Write to File.** Creates an XML file for the submitted order that includes the complete order structure with details of the record, and writes the file to the location specified by the Order Backup Path system preference.
- 25 **Submit Order WS.** Includes an input argument named siebel\_transport\_param: JMSPriority, which maps the order priority to the JMS priority.

**26 Update Orders.** If any of the preceding steps includes an exception, then this step changes the status of the order from Open to Pending.

**Associated Business Service Methods.** The following table shows the steps in this workflow that call business service methods.

Workflow Step	Method Called	In Business Service
Submit Sync on WorkflowProcMgr	SubmitRequest	Server Requests
Refresh Order Header	Refresh Business Component	SIS OM PMT Service
Refresh Order Line Items	Refresh Business Component	SIS OM PMT Service
Invalidate Stale Orders	InValidateStaleOrders	CMU External Integration Service
Change Line Item Status	SetLIAccounts	CUT eSales Order Entry Toolkit Service
Reset Active Order	Set Profile Attribute	SIS OM PMT Service
Query Order	Query	EAI Siebel Adapter
Compute Previous Step	ComputePreviousValues	CMU External Integration Service
Get Custom Attributes	GetEnterpriseParameters	CMU External Integration Service
Set Custom Attributes	SetAttributesToMessage	CMU External Integration Service
Write to File	WriteEAIMsg	EAI XML Write to File
Submit Order WS	process	SWISubmitOrder

# A

## Technical Reference for the Price Comparison Feature

This appendix provides detailed technical information about the Price Comparison feature in Siebel Energy. It includes the following topics:

- [“Components of the Pricing Calculator” on page 263](#)
- [“SmartScript for Price Comparison”](#)
- [“SIS OM Pricing Calculator Business Service” on page 270](#)
- [“SIS OM PC Comparison Workflow” on page 280](#)
- [“SIS OM PC Enrollment Workflow” on page 282](#)
- [“SIS OM PC Competitive Pricing Report Process Workflow” on page 290](#)

### Components of the Pricing Calculator

The components that make up the pricing calculator follow:

- SmartScript to collect user inputs. For more information, see [“SmartScript for Price Comparison” on page 263](#).
- The following primary workflows:
  - SIS OM PC Comparison workflow. For more information, see [“SIS OM PC Comparison Workflow” on page 280](#).
  - SIS OM PC Enrollment workflow. For more information, see [“SIS OM PC Enrollment Workflow” on page 282](#).
- The following primary methods called by the workflows:
  - Bill Decomposer. For more information, see [“Bill Decomposer Method” on page 272](#).
  - Comparison Generator. For more information, see [“Comparison Generator Method” on page 272](#).
- Other Siebel workflows and methods.

### SmartScript for Price Comparison

The SIS OM SmartScript functionality can be conceptually broken into the following parts:

- Business component classes that invoke the SIS OM SmartScript
- SIS OM SmartScripts (one standard and one high interactivity version)
- SIS OM SmartScript engine classes
- The EPC Admin VBC business component

- SIS OM PC Workflows that use SmartScript answers collected by the SIS OM SmartScripts

This topic describes all these parts followed by user property descriptions and a graphic showing the SmartScript text.

**CAUTION:** The values described in this topic must *not* be changed.

## Business Component Classes

These business component classes are used to invoke the SIS OM SmartScript. These classes contain the following methods:

- Method SISOMCreateQuote in class CSSSIABCQuote

In Siebel eSales, this method is called using the Compare Price link on the Home page. Invoking this method from these standard interactivity applications invokes the standard interactivity SmartScript.

In Siebel Energy, this method is invoked from the PC Price Comparison view. Invoking this method from this high interactivity application causes the high interactivity SmartScript to run.

**NOTE:** In Siebel Energy, this class is used by the Quote business component. When this method is invoked from the PC Price Comparison view, the parent Opportunity business component is associated with the Quote business component. In this case, the current Opportunity row ID and Opportunity name are passed as input to the SmartScript when this method is called. The SmartScript then passes these values to the workflow that is invoked when the SmartScript Finish button is clicked.

- Method SISOMRunPCReport in class CSSSISOMBCProductRelationship

This method can be used to run the SIS OM SmartScript in report mode. The method is invoked when the CP Report button from the Product Relationship view in Siebel Energy is clicked.

**NOTE:** Do not use this method when the application uses the standard-interactivity client.

**NOTE:** Both methods call the RunSmartScript method in the SIS OM PC Service business service to start the SIS OM SmartScript Engine.

## SIS OM SmartScript

There are two versions of the SIS OM SmartScript.

**SIS OM PC Comparison Smart Script - HI.** This version is the high interactivity version used in Siebel Energy.

**SIS OM PC Comparison Smart Script - LI.** This version is the standard interactivity version used in Siebel eSales and Siebel Partner Relationship Management for Siebel Energy.

**NOTE:** For the standard-interactivity client, SmartScript questions that use dynamic answers must be broken into separate SmartScript pages when the answer from one SmartScript is used as the input for the next SmartScript question.



## SIS OM SmartScript Engine Classes

The following classes make up the SIS OM SmartScript Engine:

- `CSSSWESISOMFrameWebCallScriptPlayer`, used by the SIS OM Smart Script Player Applet
- `CSSSISOMBCVCallScriptPlayer`, used by the business component SIS OM Smart Script Player

**NOTE:** When you configure using Siebel Tools, both engine classes and their associated applet and business component must be used together for SIS OM SmartScript Engine to work properly.

## SIS OM PC Workflows

There are two preconfigured SIS OM PC workflows that are invoked by the SIS OM SmartScript. For more information about these workflows, see [“SIS OM PC Competitive Pricing Report Process Workflow” on page 290](#) and [“SIS OM PC Comparison Workflow” on page 280](#).

**SIS OM PC Competitive Pricing Report workflow.** This workflow is invoked when the CP Report button is clicked in the Product Relationship view in Siebel Energy.

**SIS OM PC Comparison Process workflow.** This workflow is called in Siebel Energy when the CP Report button is clicked in the PC Price Comparison view. For Siebel eSales for Siebel Energy, this workflow is called from the Compare Price link on the Home page.

## EPC Admin Virtual Business Component

The EPC Admin virtual business component is used to specify data sources (that is, LOVs and business components) in which SmartScript answers for a particular question can be found. For more information, see *Siebel SmartScript Administration Guide*.

## SIS OM SmartScript Player User Properties

The following business component user properties, used by the SIS OM Smart Script Player business component, are used to enable the following SIS OM PC specific functionality.

### Off Page Answer Branching

This set of user properties allows a SmartScript to branch to a different SmartScript page, using a SmartScript answer from another page.

**SIS OM Branch Question.** Specifies which SmartScript question contains the answer used for off page branching.

**SIS OM Branch Answer.** Specifies which SmartScript answer triggers branching. This value is in language independent code.

**SIS OM Branch Answer LOV.** Specifies the LOV used in conjunction with user property SIS OM Branch Answer to find the language dependent value.

**SIS OM Branch Trigger Answer.** The value of this user property is used to find the SmartScript question that contains the off answer branch. The SmartScript question must have this value specified as its default answer.

### Dynamic Answers

This functionality allows the SmartScript to dynamically find, using a business service, the possible SmartScript answers for the Rate Plan and Supplier questions for both the electricity and gas questions.

**SIS OM PC Service Name.** Name of the business service that contains the methods used to get the Rate Plan (Get Area Rate Plan Names) and the Supplier (Get Area Supplier Names). Do *not* change the value of this user property.

**SIS OM Question Service Type.** Specifies which question is used to get the Service Type (Electricity or Gas). The Service Type is used as input to the Get Area Rate Plan Names and Get Area Supplier Names methods.

**SIS OM Question Electric Service Area.** Specifies which SmartScript question contains the electricity Service Area question. The Service Area is used as input to the Get Area Rate Plan Names and Get Area Supplier Names methods.

**SIS OM Question Electric Supplier Name.** Specifies which SmartScript question contains the electricity Supplier Name question. The answers that this SmartScript question displays come from calling the SIS OM PC Service business service's method and Get Area Supplier Names.

**SIS OM Question Electric Rate Plan.** Specifies which SmartScript question contains the electricity Rate Plan question. The answers that this SmartScript question displays come from calling the SIS OM PC Service business service's Get Area Rate Plan Names method.

**NOTE:** This method takes the Supplier Name, the Service Type, and Service Area as input, so the Supplier Name SmartScript question must come before the Rate Plan question for a particular Service Type.

**SIS OM Question Gas Service Area.** Specifies which SmartScript question contains the gas Service Area question. The Service Area is used as input to the Get Area Rate Plan Names and Get Area Supplier Names methods.

**SIS OM Question Gas Supplier Name.** Specifies which SmartScript question contains the gas Supplier Name question. The answers that this SmartScript question displays come from calling the SIS OM PC Service business service's method and Get Area Supplier Names.

**SIS OM Question Gas Rate Plan.** Specifies which SmartScript question contains the gas Rate Plan question. The answers that this SmartScript question displays come from calling the SIS OM PC Service business service's Get Area Rate Plan Names method.

**NOTE:** This method takes the Supplier Name, the Service Type, and Service Area as input, so the Supplier Name SmartScript question must come before the Rate Plan question for a particular Service Type.

### Report Mode

These user properties are used when the SmartScript is in report mode. The SmartScript is in report mode when the SmartScript is invoked from the Relationship view New button (method invoked SISOMRunPCReport using class CSSSISOMBCProductRelationship).

**SIS OM Report Mode: No Answer Validation #.** Specifies which SmartScript questions do not have to be answered when in report mode. If a SmartScript question is left blank and it uses this user property, then it is assumed that All SmartScript answers were selected for this question.

**SIS OM Report Mode: On Finish View.** Specifies which view appears after the report workflow is started.

**SIS OM Report Mode: SIS OM Finish Workflow.** Specifies which workflow is called to generate the report when the SmartScript Finish button is clicked.

### General User Properties

**SIS OM Finish Workflow.** Specifies which workflow is called when the SmartScript Finish button is clicked.

## SIS OM Pricing Calculator Business Service

This topic includes information about business properties for some methods in the SIS OM Pricing Calculator business service. For more information about this business service, see [“SIS OM Pricing Calculator Business Service” on page 270](#).

### CP Report Create Quotes Method

The following user properties are used by the CP Report Create Quotes method, which is used to create the data set used when generating a report.

**Dual Fuel Service Type.** Specifies the language independent code used to specify the dual fuel Service Type.

**Service Type Question Name.** Specifies which SmartScript question in the SmartScript answer table contains the Service Type.

**Electric Region Question Name.** Specifies which SmartScript question in the SmartScript answer table contains the electricity Region (Service Area).

**Electric Service Type.** Specifies the language independent code used to specify the electricity Service Type.

**Electric Supplier Question Name.** Specifies which SmartScript question in the SmartScript answer table contains the electricity Supplier.

**Electric Tariff Question Name.** Specifies which SmartScript question in the SmartScript answer table contains the electricity Tariff (Rate Plan).

**Gas Region Question Name.** Specifies which SmartScript question in the SmartScript answer table contains the electricity Region (Service Area).

**Gas Service Type.** Specifies the language independent code used to specify the gas Service Type.

**Gas Supplier Question Name.** Specifies which SmartScript question in the SmartScript answer table contains the gas Supplier.

**Gas Tariff Question Name.** Specifies which SmartScript question in the SmartScript answer table contains the gas Tariff (Rate Plan).

### Run SmartScript Method

The following user properties are used by the Run SmartScript method as defaults if these values are not specified as input to this method.

**SIS OM ScriptName - HI.** Specifies the default SIS OM SmartScript to run if the application uses the high-interactivity client.

**SIS OM ScriptName - LI.** Specifies the default SIS OM SmartScript to run if the application uses the standard-interactivity client.

**SIS OM ViewName.** Specifies the default view that contains the SIS OM SmartScript Engine.

Figure 30 shows the SmartScript text for the Price Comparison feature.

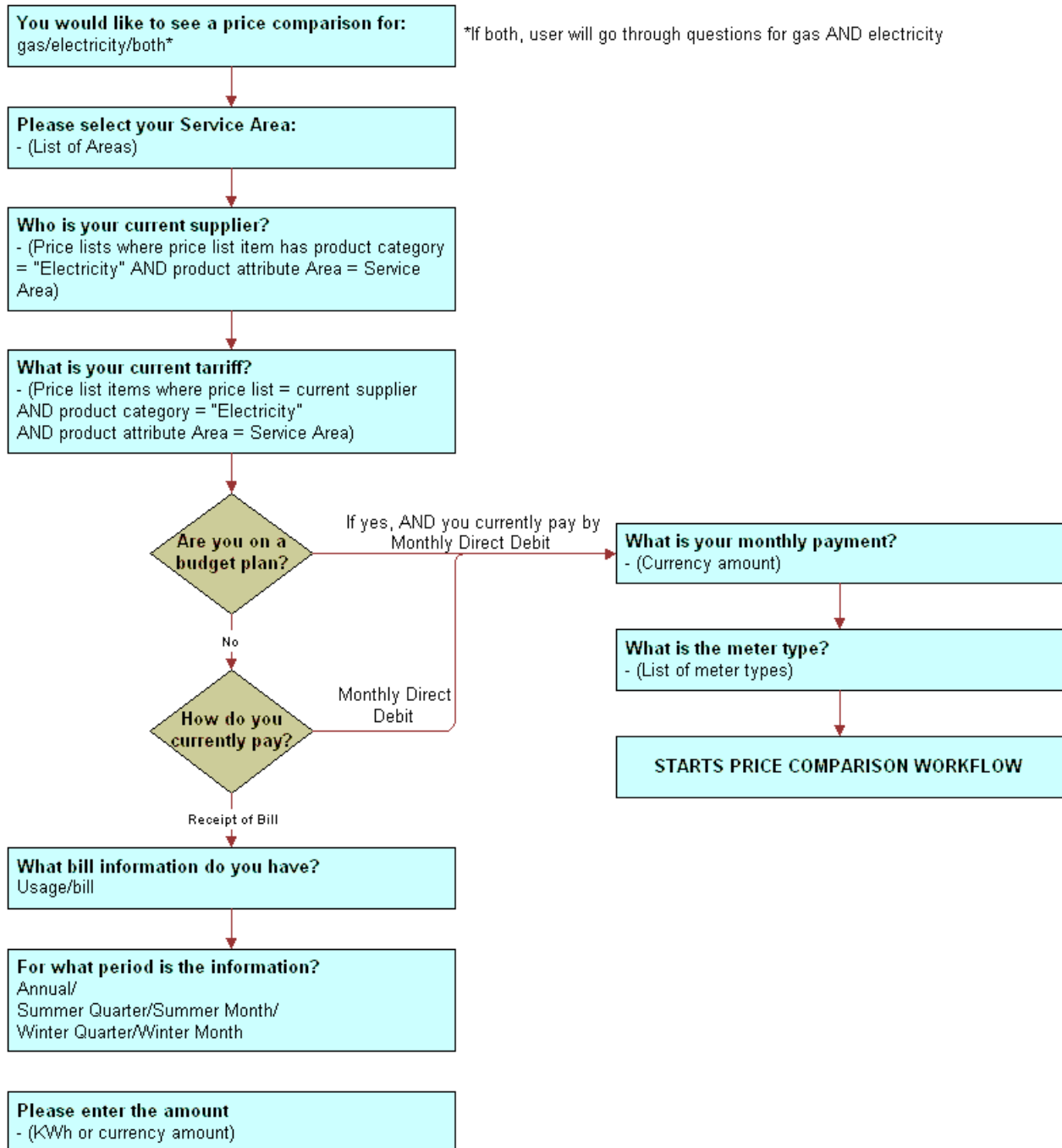


Figure 30. SmartScript Workflow for Price Comparison

## SIS OM Pricing Calculator Business Service

The SIS OM Pricing Calculator (PC) business service is a set of methods that implements the back-end calculation engine for the pricing calculator. Different workflows, which provide the business flow of this functionality, invoke the methods.

The two primary methods, Bill Decomposer and Comparison Generator, decompose a utility bill from a prospective customer into the usage breakdown and use that data to determine the comparable internal rate plans that best meet the customer's criteria.

More specifically, Bill Decomposer receives a PC Competitor quote that represents the utility bill from a competitor as input. Using the details of competitors' rate plans stored in the Siebel database, Bill Decomposer then reverse-engineers the utility bill information to deduce the usage breakdown of this prospective customer. It stores the result in the PC Competitor quote.

The quote is then passed to Comparison Generator, which looks up the internal rate plans to locate those that meet the customer's requirements. Comparison Generator then creates a PC Comparison quote for each of those matching rate plans and uses the Pricing Engine to calculate the potential savings available to prospective customers, if they switch to the rate plans.

### User Properties for Pricing Calculator Methods

Pricing Calculator methods use the following user properties:

- **XA Name - Area.** Name of the product attribute used to store the service area where the rate plan is being offered.
- **XA Name - Usage Type.** Name of the product attribute used to store the usage breakdown category of the rate plan. The preconfigured value of this property is Usage Type.
- **Usage Type *n*.** Valid values for the Usage Type attribute specified by the XA Name - Usage Type user property. For example:

Name	Value
Usage Type 1	Peak
Usage Type 2	Off Peak
Usage Type 3	Threshold

**NOTE:** You can create additional usage types. For information about adding a new usage type, see ["Adding a Usage Type for the Pricing Calculator"](#) on page 271.

- **Threshold Usage Type.** Value of the Usage Type attribute that is handled as the threshold usage (that is, the number of units charged at a specified price before applying other pricing rules). The preconfigured value is Threshold.
- **Peak.** Name of the field of the SIS OM PC Usage Profile business component that is used to store the Peak category of usage breakdown.

- **Off Peak.** Name of the field of the SIS OM PC Usage Profile business component used to store the Off Peak category of usage breakdown.
- **Must Match XA *n*.** Names of product attributes that an internal rate plan must possess to be qualified as a match to the current rate plan used by the prospective customer. For example:

Name	Value
Must Match XA 1	MeterType
Must Match XA 2	Region

- **PC Type *n*.** Names of all the basic (non-dual) service types of products used in the Pricing Calculator functionality. For example:

Name	Value
PC Type 1	Electricity
PC Type 2	Gas

- **Dual Fuel Service Type.** Name of the service type of products designated for dual fuel discount processing.
- **SIS OM ViewName.** Default view to use when displaying the PC SmartScript. It is used by the Run SmartScript method.
- **SIS OM AppletName.** Default applet to use when displaying the PC SmartScript. It is used by the Run SmartScript method.
- **SIS OM ScriptName - HI.** Default SmartScript script to use for the high-interactivity client. It is used by the Run SmartScript method.
- **SIS OM ScriptName - LI.** Default SmartScript script to use for the standard-interactivity client. It is used by the Run SmartScript method.

## Adding a Usage Type for the Pricing Calculator

To add a new usage type for the pricing calculator, follow this procedure.

### *To add a usage type for the pricing calculator*

- 1 Add the new value to the attribute specified by the user property XA Name - Usage Type.
- 2 Add a new user property *Usage Type n* to specify this new value.
- 3 Add both a new field to the SIS OM PC Usage Profile business component and a new column to its underlying table for the data storage.
- 4 Add a new user property with this new usage type as the name and the Business Component field name added above as the value.

## Bill Decomposer Method

This method decomposes a utility bill provided by a prospective customer into the usage breakdown. The calculation is based on a number of billing parameters derived from the information in the utility bill. This method is part of "[SIS OM Pricing Calculator Business Service](#)."

### Arguments

*PCMultiQuotes*

[in/out] List of SIS OM Quote integration object instances that are used to store the utility bill information provided by a prospective customer. The usage breakdown is also written back into this quote structure as output. (Required)

### Returns

List of SIS OM Quote integration object instances that contain the usage breakdown.

### Remarks

The usage breakdown is represented in a quote integration object as the Quantity field of a usage sub-line item with the Usage Type attribute set to a specific value (for example, Threshold, Peak, Off Peak).

### Related Topic

["SIS OM PC Comparison Workflow" on page 280](#)

## Comparison Generator Method

This method locates the comparable internal rate plans that match the rate plan currently provided to the prospective customer by a competitor. It creates a quote of type PC Comparison for each of the matching internal rate plans, setting the Quantity field to the usage breakdown obtained from the PCMultiQuotes input (which is usually generated from the Bill Decomposer Business Service method). This method is part of "[SIS OM Pricing Calculator Business Service](#)."

### Arguments

*PCMultiQuotes*

[in] List of SIS OM Quote integration object instances that are used to store the utility bill information provided by a prospective customer, along with the usage breakdown calculated by the Bill Decomposer method. (Required)

*Opportunity*

[in] Name of the opportunity object under which the generated PC Comparison quotes are stored. (Required)

*PriceList*



[in] Name of the Price List that contains the collection of internal products from which matching rate plans are located. (Required)

*OpportunityRevenueAmt*

[out] Summation of the total bill amount for each of the utility bills represented in the PCMultiQuotes input argument.

### Returns

*OpportunityRevenueAmt*

Total bill amount the prospective customer is paying a competitor for.

### Remarks

The usage breakdown is represented in a quote integration object as the Quantity field of a usage sub-line item with the Usage Type attribute set to a specific value (for example, Threshold, Peak, Off Peak).

### Related Topics

["Bill Decomposer Method" on page 272](#)

["SIS OM PC Comparison Workflow" on page 280](#)

## Update Status Method

This method searches for all quotes with a certain type for a given opportunity and updates a user-specified field in those quotes. This method is part of ["SIS OM Pricing Calculator Business Service."](#)

### Arguments

*Opportunity Id*

[in] ID of the opportunity for which the quotes are to be updated. (Required)

*QuoteType*

[in] Type of the quotes for which the user wants to query. (Required)

*FieldName*

[in] Name of the field in the quote business component that the user intends to update. (Required)

*FieldValue*

[in] Value to be set to the field in the quote business component that the user intends to update. (Required)

### Returns

*None.*

### Remarks

In the preconfigured use of this method, the value of Opportunity Id is passed through the Named Method that invokes the SIS OM PC Enrollment workflow, within which the other values of QuoteType, FieldName and FieldValue are set.

### Related Topic

["SIS OM PC Enrollment Workflow" on page 282](#)

## Get Area Rate Plan Names Method

This method locates available rate plans provided by any company (supplier) within a service area. This method is part of ["SIS OM Pricing Calculator Business Service."](#)

### Arguments

*Supplier Name*

[in] Name of the company with the needed rate plans. (Optional)

*Service Area*

[in] Region within which the rate plans are needed. (Optional)

*Service Type*

[in] Type of service for search. Possible inputs are Gas, Electricity, or Dual Fuel. (Required)

### Returns

List of rate plans that match the criteria.

### Remarks

The list of rate plans is returned in a string in this structure: Plan 1, Plan 2, and so on.

## Get Area Supplier Names Method

This method returns the list of supplier names for a given service type in a given service area. This method is part of ["SIS OM Pricing Calculator Business Service."](#)

### Arguments

*Service Area*

[In] Region within which the rate plans are needed. (Optional)

*Service Type*

[In] Type of service for search. Possible inputs are Gas, Electricity, or Dual Fuel. (Required)

### Returns

List of supplier names that match the criteria.

### Remarks

The list of supplier names is returned in a string in this structure: Company 1, Company 2, and so on.

## Run SmartScript Method

This method is used to run the pricing calculator's SmartScripts. This method is part of ["SIS OM Pricing Calculator Business Service."](#)

### Arguments

#### *Script Name*

[in] Name of the SmartScript to run. (Optional)

If this parameter is not supplied, then the business service user property SIS OM ScriptName - HI is used to find the default SmartScript when running in the high-interactivity client. When running in the standard-interactivity client, the business service user property SIS OM ScriptName - LI is used to find the default SmartScript. For more information, see ["User Properties for Pricing Calculator Methods" on page 270.](#)

#### *Applet Name*

[in] Name of the applet used to display the SmartScript. (Optional)

If this parameter is not supplied, then the business service user property SIS OM AppletName is used to find the default applet. For more information, see ["User Properties for Pricing Calculator Methods" on page 270.](#)

#### *View Name*

[in] Name of the view used to display the SmartScript. (Optional)

If this parameter is not supplied, then the business service user property SIS OM ViewName is used to find the default view. For more information, see ["User Properties for Pricing Calculator Methods" on page 270.](#)

#### *Currency Code*

[in] Sets the current code used by the SmartScript. (Optional)

#### *Language Code*

[in] Sets the language code used by the SmartScript. (Optional)

#### *Script Id*

[in] Used to rerun a previous SmartScript session. (Optional)

### Returns

*None*

## Convert PC Quote to Quote Method

This method converts a Price Comparison (PC) Quote into a regular quote. The quantity for usage products is reset to 1, which is the number of items to be ordered. This method is part of ["SIS OM Pricing Calculator Business Service."](#)

### Arguments

*Account*

[in] Name of the account for the PC Quote. (Optional)

*QuoteId*

[in] Quote Id of the PC Quote that is to be converted to a regular quote. (Required)

*SiebelMessage*

[out] Property set output that represents the regular quote. (Optional)

*AutoSync*

[in] True or false value used to synchronize the regular quote to the database. For performance reasons, this value is usually not specified and the regular quote is synchronized to the database after other operations that follow this step.

### Returns

*SiebelMessage*

Property set output that represents the regular quote.

### Related Topic

["SIS OM PC Enrollment Workflow" on page 282](#)

## Convert PC Input to PC Quote Method

The answers from a SmartScript session are taken as the Pricing Calculator input and are converted into a Competitor Quote. Multiple quotes are created as appropriate by using the SmartScript answers. This method is part of ["SIS OM Pricing Calculator Business Service."](#)

### Arguments

*PCMultiQuotes*

[out] List of SIS OM Quote integration object instances that are used to store the utility billing information provided by a prospective customer. (Required)

#### *Opportunity*

[in] Name of the opportunity object under which the generated PC Comparison quotes is stored. (Required)

#### *OpportunityId*

[in] ID of the opportunity object under which the generated PC Comparison quotes is stored. (Required)

#### *RunId*

[in] RunId of the SmartScript session in which the answers are stored. This value typically is a process property that is set internally when the SmartScript session is finished. (Required)

### **Returns**

#### *PCMultiQuotes*

List of SIS OM Quote integration object instances that are used to store the utility billing information provided by a prospective customer.

### **Related Topic**

["SIS OM PC Comparison Workflow" on page 280](#)

## **Setup Question Field Map Method**

This method determines the type of the question, the name of the business component, and the field in which the answer to a specific SmartScript question is stored. This step is required before the PC Input to PC Quote conversion method is called. This method is part of ["SIS OM Pricing Calculator Business Service."](#)

The syntax for the arguments is: *type-buscomp-field*, where *type* is a value of PC Type *n* user properties.

### **Arguments**

*Electricity-Quote Item-Product*

*Electricity-Quote Item XA-Meter Type*

*Electricity-Quote Item XA-Payment Method*

*Electricity-Quote Item-Usage CxTotal*

*Electricity-Quote-Bill Period*

*Electricity-Quote-PC Bill Info*

*Electricity-Quote-PC Budget Plan*

*Electricity-Quote-Price List*

*Electricity-Quote-Region*

*Gas-Quote Item XA-Meter Type*

*Gas-Quote Item XA-Payment Method*

*Gas-Quote Item-Product*

*Gas-Quote Item-Usage CxTotal*

*Gas-Quote-Bill Period*

*Gas-Quote-PC Bill Info*

*Gas-Quote-PC Budget Plan*

*Gas-Quote-Price List*

*Gas-Quote-Region*

[in] A list of mapping arguments that are mapped to a corresponding question name. The list is defined whether a customer chooses to answer all questions at runtime. The argument values are the question names. (Required)

#### Returns

*None*

#### Related Topic

["SIS OM PC Comparison Workflow" on page 280](#)

## Delete Existing PC Quotes Method

This method deletes existing PC Quotes for a given opportunity. This method is part of ["SIS OM Pricing Calculator Business Service."](#)

#### Arguments

*Opportunity*

[in] Name of the opportunity for which all the existing PC Quotes are deleted. (Required)

#### Returns

*None*

#### Remarks

The Delete PC Quotes Search Spec user property of the Quote business components specifies the search specification to be used by the method to determine which quotes to delete.

### Related Topic

[“SIS OM PC Comparison Workflow” on page 280](#)

## CP Report Create Quotes Method

This method is an intermediate step in the generation of the Competitive Pricing report. It takes input from a SmartScript session and reads the Pricing Calculator Relationship entries. It replaces some of the SmartScript answers and generates a quote for each In-House entry in the Relationship table and a matching quote for each like-for-like Competitor entry. This method is part of [“SIS OM Pricing Calculator Business Service.”](#)

Since this method invokes Convert PC Input to PC Quote internally, its arguments are formed as for that method, and passed through. CP Create Quotes directly uses only the RunId of the SmartScript session.

### Arguments

*PCMultiQuotes*

[out] A list of SIS OM Quote integration object instances that are used to store the utility billing information provided by a prospective customer. (Required)

*Opportunity*

[in] The name of the opportunity object under which the generated PC Comparison quotes is stored. (Required)

*OpportunityId*

[in] The Id of the opportunity object under which the generated PC Comparison quotes is stored. (Required)

*RunId*

[in] The RunId of the SmartScript session in which the answers are stored. This value typically is a process property that is set internally when the SmartScript session is finished. (Required)

### Returns

*PCMultiQuotes*

A list of SIS OM Quote integration object instances that are used to store the utility billing information provided by a prospective customer.

## Get Next RowId Method

This method generates a unique RowId that can be used to populate required fields in business components. This method is part of [“SIS OM Pricing Calculator Business Service.”](#)

## Arguments

*RowId*

[out] The automatically-generated RowId is returned.

# SIS OM PC Comparison Workflow

The SIS OM PC Comparison Process is called by a SmartScript session. The SmartScript session is invoked by clicking the New button in the SIS OM PC Opportunity Price Comparison view or by clicking the Compare Prices link on Oracle's Siebel eSales Home Page.

Figure 31 shows this workflow.

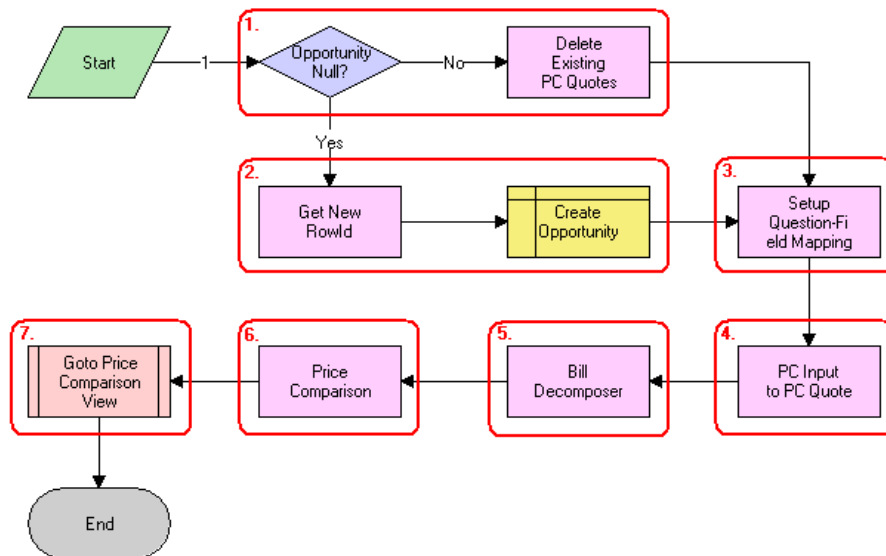


Figure 31. SIS OM PC Comparison Process

**Workflow Description.** This workflow performs the following actions:

- 1 Opportunity Null? Delete Existing PC Quotes.** These steps check to determine whether an opportunity exists for the Price Comparison. If an opportunity exists, then all existing quotes that meet the specified criteria are deleted. Preconfigured quotes of type PC Comparison, PC Like for Like, and PC Competitor are deleted.
- 2 Get New RowId. Create Opportunity.** These steps create a new opportunity if an opportunity does not exist.
- 3 Setup Question-Field Mapping.** This step maps the SmartScript session questions to fields of a quote.
- 4 PC Input to PC Quote.** This step converts the answers from the SmartScript session into a competitor quote using the mapping created in the previous step.



- 5 **Bill Decomposer.** This step uses the Bill Decomposer method and the competitor quote information to calculate the user's annual usage.
- 6 **Price Comparison.** This step uses the Price Comparison method to generate a comparison quote for each product offered by the company that meets the criteria specified by the user. The usage amounts calculated by this step are used to calculate the projected annual bill given the pricing of the product.
- 7 **Goto Price Comparison View.** This step shows the comparison quotes in the Opportunity Price Comparison view. For more information, see ["SIS OM Goto Price Comparison View Workflow" on page 281.](#)

Table 17 lists the SIS OM PC Comparison Workflow steps, methods, and business services.

Table 17. Business Service Methods for SIS OM PC Comparison Workflow

This Workflow Step	Calls This Method	In This Business Service
Delete Existing PC Quotes	Delete Existing PC Quotes	SIS OM Pricing Calculator Service
Get New RowId	Get Next RowId	SIS OM Pricing Calculator Service
Setup Question-Field Mapping	Setup Question Field Map	SIS OM Pricing Calculator Service
PC Input to PC Quote	Convert PC Input to PC Quote	SIS OM Pricing Calculator Service
Bill Decomposer	Bill Decomposer	SIS OM Pricing Calculator Service
Price Comparison	Comparison Generator	SIS OM Pricing Calculator Service

## SIS OM Goto Price Comparison View Workflow

The SIS OM Goto Price Comparison View workflow is invoked as a subprocess of the SIS OM PC Price Comparison workflow.

Figure 32 shows this workflow.

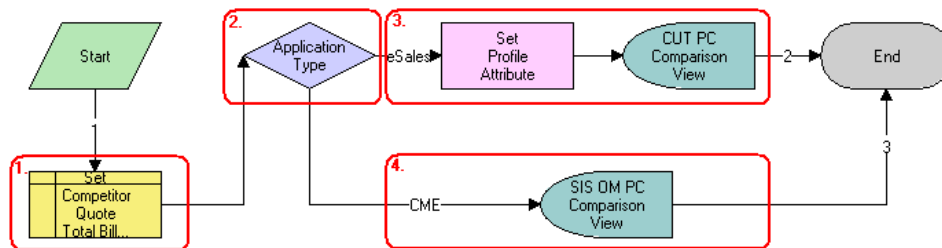


Figure 32. SIS OM Goto Price Comparison View Process

**Workflow Description.** This workflow performs the following actions:

- 1 Set Competitor Quote Total Bill.** This step sets the Primary Revenue Amount of the Opportunity to the total bill amount, passed as an input to the workflow.
- 2 Application Type.** This step checks the application that invokes the workflow.
- 3 Set Profile Attribute. CUT PC Comparison View.** These steps store the Opportunity Id as a profile attribute and show the CUT Opportunity PC Price Comparison View (eSales) if the application is eSales.
- 4 SIS OM PC Comparison View.** This step shows the SIS OM Opportunity PC Price Comparison View.

Table 18 lists the Goto Price Comparison Workflow steps, methods, and business services.

Table 18. Business Service Methods for Goto Price Comparison View Workflow

This Workflow Step	Calls This Method	In This Business Service
Set Profile Attribute	Set Profile Attribute	SIS OM Product Manipulation Toolkit Service

## SIS OM PC Enrollment Workflow

The SIS OM PC Enrollment workflow is invoked by clicking the Enroll button in the SIS OM PC Opportunity Price Comparison View or the CUT Opportunity PC Price Comparison View (eSales).

Figure 33 shows this workflow.

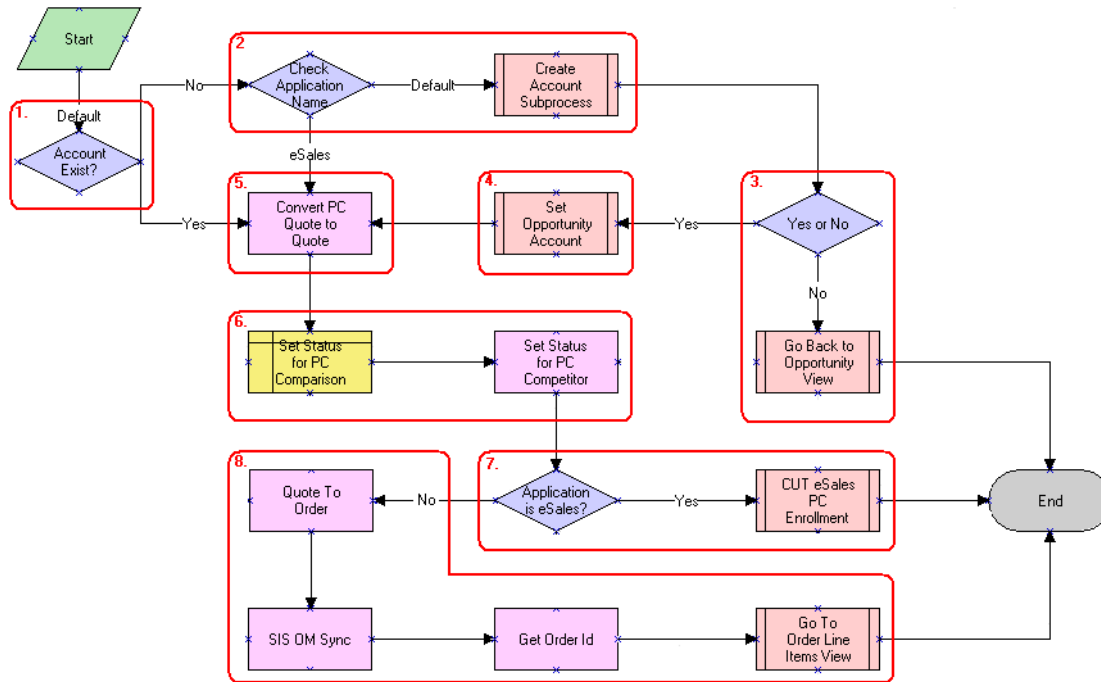


Figure 33. SIS OM PC Enrollment Process

**Workflow Description.** This workflow performs the following actions:

- 1 **Account Exist?** This step checks to determine whether an account is associated with the opportunity.
- 2 **Check Application Name. Create Account Subprocess.** These steps show the SIS OM PC Account Entry view to allow the user to create a new account if an account does not exist and if the application that invoked the workflow is not eSales. For more information, see ["SIS OM PC Create Account Subprocess Workflow" on page 284.](#)
- 3 **Yes or No. Go Back to Opportunity View.** These steps check to see whether an account was created. If an account was not created, then the user is returned to the SIS OM PC Opportunity Price Comparison view. For more information, see ["SIS OM PC Go To Opportunity View Workflow" on page 285.](#)
- 4 **Set Opportunity Account.** This step associates the account with the opportunity if the user created a new account. For more information, see ["SIS OM PC Set Opportunity Account Workflow" on page 286.](#)
- 5 **Convert PC Quote to Quote.** This step converts the comparison quote i to a regular quote that can be progressed through the order life cycle.
- 6 **Set Status for PC Comparison. Set Status for PC Competitor.** These steps set the Status of the comparison and competitor quotes to Order Placed.

- 7 Application is eSales? CUT eSales PC Enrollment.** These steps merge the comparison quote with the shopping cart if the application that invoked the workflow is eSales. For more information, see [“CUT eSales - PC Enrollment Workflow” on page 287](#).
- 8 Quote to Order. SIS OM Sync. Get Order Id. Go To Order Line Items View.** These steps convert the quote to an order and show the order in the Order Line Item view if the application is not eSales. For more information, see [“SIS OM PC Go to Order Entry - Line Items View \(Sales\) Workflow” on page 286](#).

Table 19 lists the SIS OM PC Enrollment Process steps, methods, and business services.

Table 19. Business Service Methods for SIS OM PC Enrollment Process

This Workflow Step	Calls This Method	In This Business Service
Convert PC Quote to Quote	Convert PC Quote to Quote	SIS OM Pricing Calculator Service
Set Status for PC Competitor	Update Status	SIS OM Pricing Calculator Service
Quote to Order	Convert Product Instance	SIS OM Product Manipulation Toolkit Service
SIS OM Sync	Synchronize	SIS OM Product Manipulation Toolkit Service

## SIS OM PC Create Account Subprocess Workflow

The SIS OM PC Create Account Subprocess is invoked as a subprocess of the SIS OM PC Enrollment workflow.

Figure 34 shows this workflow.

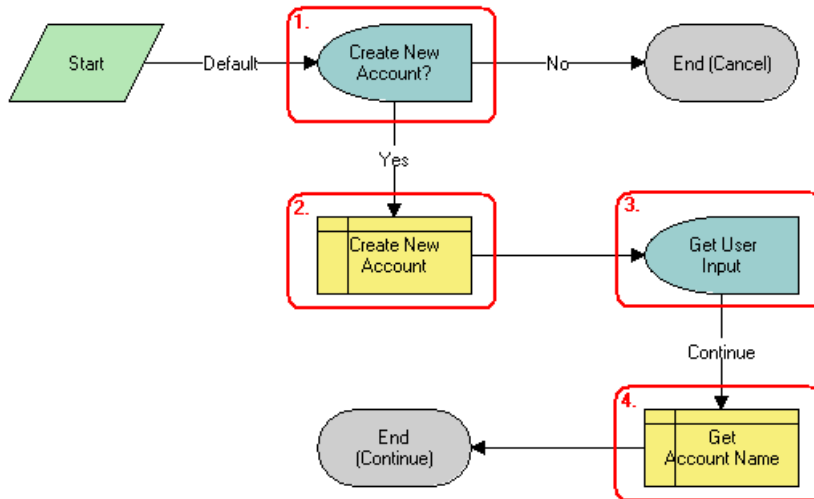


Figure 34. SIS OM PC Create Account Subprocess

**Workflow Description.** This workflow performs the following actions:

- 1 **Create New Account?** This step shows the SIS OM PC Account Entry Selection View, and the user is asked whether to create a new account. If the user clicks No, then an account is not created and the subprocess terminates.
- 2 **Create New Account.** This step creates a new account if the user clicks Yes.
- 3 **Get User Input.** This step shows the SIS OM PC Account Entry View to allow the user to enter the details of the account. The user clicks Continue.
- 4 **Get Account Name.** This step retrieves the name of the account and returns it to the calling workflow.

## SIS OM PC Go To Opportunity View Workflow

The SIS OM PC Go To Opportunity View workflow is invoked as a subprocess of the SIS OM PC Enrollment workflow.

Figure 35 shows this workflow.



Figure 35. SIS OM PC Go To Opportunity View

**Workflow Description.** This workflow performs the following action:

- **Opportunity PC View.** This step displays the SIS OM PC Opportunity Price Comparison view.

## SIS OM PC Set Opportunity Account Workflow

The SIS OM PC Set Opportunity Account workflow is invoked as a subprocess of the SIS OM PC Enrollment workflow.

Figure 36 shows this workflow.



Figure 36. SIS OM PC Set Opportunity Account

**Workflow Description.** This workflow performs the following action:

- **Set Opportunity Account Id.** This step associates the Account Id specified by the process property with the Opportunity.

## SIS OM PC Go to Order Entry - Line Items View (Sales) Workflow

The SIS OM PC Go to Order Entry - Line Items View (Sales) is invoked as a subprocess of the SIS OM PC Enrollment workflow.

Figure 37 shows this workflow.

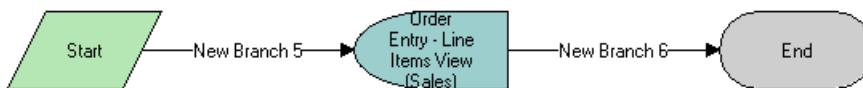


Figure 37. SIS OM PC Go to Order Entry - Line Items View (Sales)

**Workflow Description.** This workflow performs the following action:

- **Order Entry - Line Items View (Sales).** This step navigates to the Order Entry - Line Items View (Sales).

## CUT eSales - PC Enrollment Workflow

The CUT eSales - PC Enrollment workflow is invoked as a subprocess of the SIS OM PC Enrollment workflow.

Figure 38 shows this workflow.

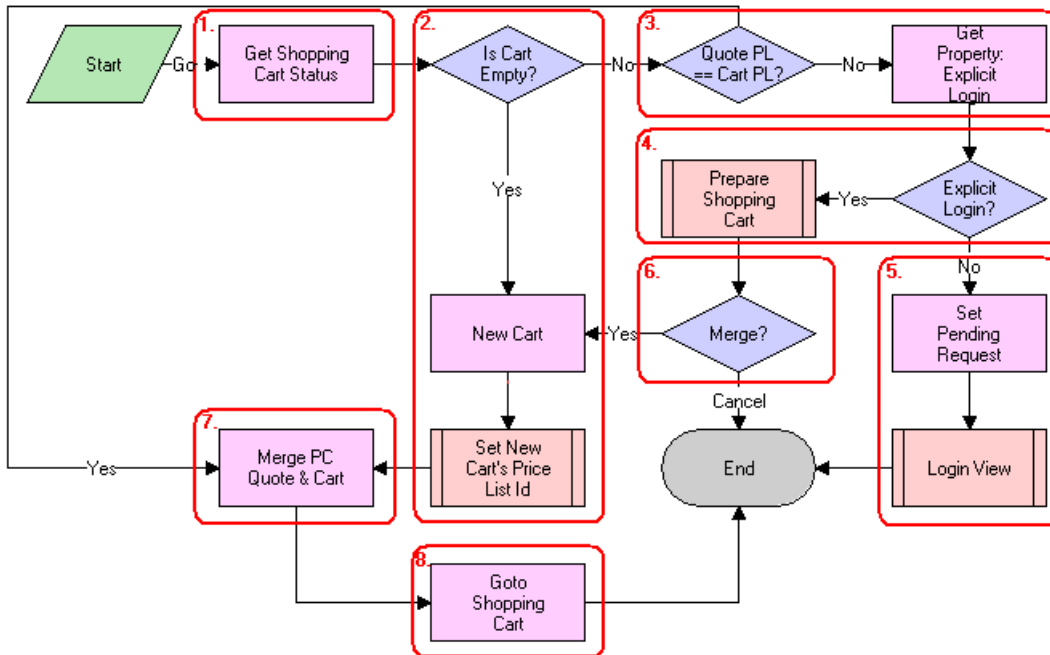


Figure 38. CUT eSales - PC Enrollment Process

**Workflow Description.** This workflow performs the following actions:

- 1 Get Shopping Cart Status.** This step checks the status of the shopping cart.
- 2 Is Cart Empty? New Cart. Set New Cart's Price List Id.** These steps create a new cart if the cart is empty, and set the cart's price list to the Price Comparison internal price list. For more information, see ["CUT eSales - Set Shopping Cart Price List Workflow"](#) on page 288.
- 3 Quote PL == Cart PL? Get Property: Explicit Login.** These steps compare the cart's price list to the price list of the comparison quote selected by the user if the cart is not empty. If the price lists are different, then a check is made to see whether the user explicitly logged in.
- 4 Explicit Login? Prepare Shopping Cart.** These steps show the Save Cart Confirmation view to allow the user to specify how to handle the existing cart if the user logged in. For more information, see ["CUT eSales - PC Prepare Cart Process Workflow"](#) on page 288.
- 5 Set Pending Request. Login View.** These steps make a request to display the CUT Opportunity PC Price Comparison View (eSales) on login if the user is not logged in, and show the Login View.
- 6 Merge?** This step terminates the workflow if the user chose not to save or discard the existing cart.

- 7 Merge PC Quote & Cart.** This step adds the comparison quote line items to the cart if the comparison quote's price list and the cart's price list are the same, or if a new cart was created.
- 8 Goto Shopping Cart.** This step shows the Shopping Cart view.

Table 20 lists the CUT eSales - PC Enrollment Process steps, methods, and business services.

Table 20. Business Service Methods for CUT eSales - PC Enrollment Process

This Workflow Step	Calls This Method	In This Business Service
Get Shopping Cart Status	GetShoppingCartStatus	CUT OET Service
Get Property: Explicit Login	GetPropValue	Shopping Service
New Cart	NewCartHeader	CUT OET Service
Set Pending Request	Set Pending Request	Shopping Service
Merge PC Quote & Cart	MergeCxObj	CUT OET Service
Goto Shopping Cart	GotoView	CUT OET Service

## CUT eSales - Set Shopping Cart Price List Workflow

The CUT eSales - Set Shopping Cart Price List process is invoked as a subprocess of the CUT eSales - PC Enrollment Process workflow.

Figure 39 shows this workflow.



Figure 39. CUT eSales - Set Shopping Cart Price List

**Workflow Description.** This workflow performs the following action:

- **Set Cart Price List Id.** This step updates the cart's price list to the specified value.

## CUT eSales - PC Prepare Cart Process Workflow

The CUT eSales - PC Prepare Cart Process workflow is invoked as a subprocess of the CUT eSales - PC Enrollment Process workflow.



Figure 40 shows this workflow.

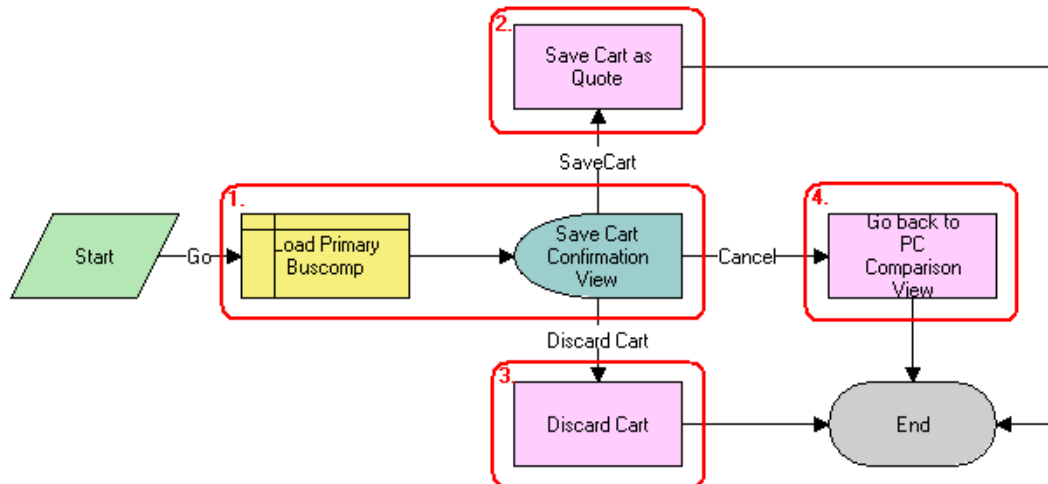


Figure 40. CUT eSales - PC Prepare Cart Process

**Workflow Description.** This workflow performs the following actions:

- 1 Load Primary Buscomp. Save Cart Confirmation View.** These steps load the current shopping cart and show the Save Cart Confirmation view.
- 2 Save Cart as Quote.** This step saves the cart if the user chooses Save.
- 3 Discard Cart.** This step discards the cart if the user chooses Discard.
- 4 Go back to PC Comparison View.** This step shows the CUT Opportunity PC Price Comparison View (eSales) and terminates the calling workflow if the user chooses Cancel.

Table 21 lists the CUT eSales - PC Prepare Cart Process Workflow steps, methods, and business services.

Table 21. Business Service Methods for CUT eSales - PC Prepare Cart Process

This Workflow Step	Calls This Method	In This Business Service
Save Cart as Quote	SaveCartAsQuote	Shopping Service
Discard Cart	DiscardCart	Shopping Service
Go Back to PC Comparison View	GotoView	CUT OET Service

# SIS OM PC Competitive Pricing Report Process Workflow

The workflow is called by a SmartScript session that is invoked by clicking the CP Report button in the Relationships view of the Product Comparison screen.

Figure 41 shows this workflow.

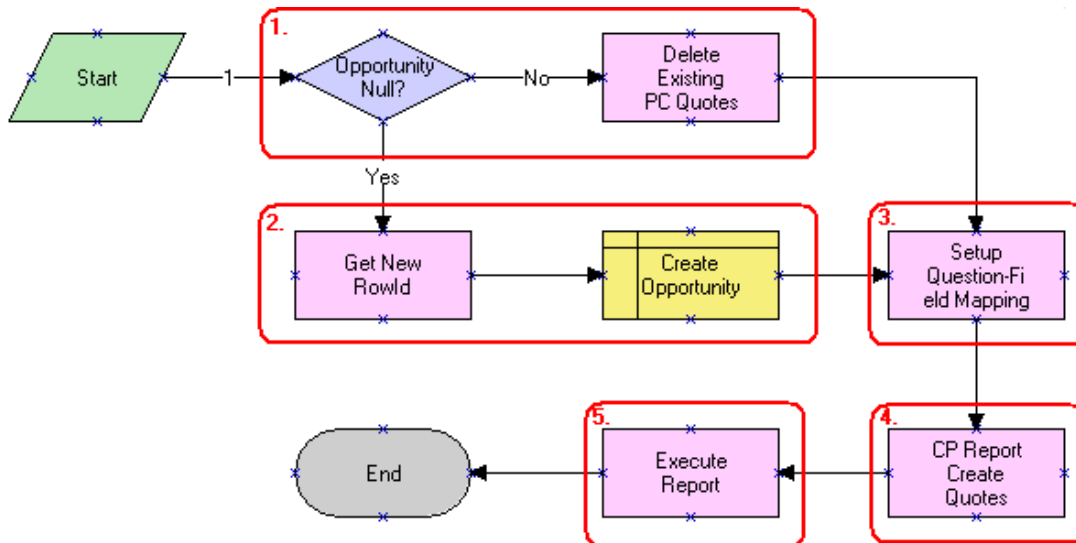


Figure 41. SIS OM PC Competitive Pricing Report Process Workflow

**Workflow Description.** This workflow performs the following actions:

- 1 Opportunity Null? Delete Existing PC Quotes.** These steps check to determine whether an opportunity exists for the Price Comparison. If there is an opportunity, then all existing price comparison quotes are deleted.
- 2 Get New RowId. Create Opportunity.** These steps create a new opportunity if an opportunity does not exist.
- 3 Setup Question-Field Mapping.** This step maps the SmartScript session questions to fields of a quote.
- 4 CP Report Create Quotes.** This step converts the answers from the SmartScript session into a competitor quote by using the mapping created in the previous step. Using the answers from the SmartScript session, the data is generated for the report.
- 5 Execute Report.** This step executes the report by using the data set generated by the previous step.

Table 22 lists the SIS OM PC Competitive Pricing Report Process Workflow steps, methods, and business services.

Table 22. Business Service Methods for SIS OM Competitive Pricing Report Process Workflow

This Workflow Step	Calls This Method	In This Business Service
Delete Existing PC Quotes	Delete Existing PC Quotes	SIS OM Pricing Calculator Service
Get New RowId	Get Next RowId	SIS OM Pricing Calculator Service
Setup Question-Field Mapping	Setup Question Field Map	SIS OM Pricing Calculator Service
CP Report Create Quotes	CP Report Create Quotes	SIS OM Pricing Calculator Service
Execute Report	Execute Report	Report Service



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