

Automating Quote Generation

A Seamless Integration between Inbound Email Workflow and Siebel CRM

Summary

As companies continue to digitize their customer interactions, the need for efficient and automated workflows becomes increasingly important. One such workflow is the processing of quote agreements from customers, which typically involves manual data entry into a Customer Relationship Management (CRM) system. In this whitepaper, we'll explore how companies can leverage its existing Siebel CRM implementation to automate the generation of quotes and quote items from customer-submitted Excel attachments.

Overview

The current workflow involves receiving email attachments containing quote agreements in Excel format. These attachments are processed through Siebel's inbound email workflow, creating records for actions and attachment new. To streamline this process, we've developed a solution that utilizes Siebel's Business Service Server Script to invoke a custom REST API, which parses the Excel attachment and generates JSON data representing the quote information. This JSON data is then used to create corresponding quote and quote item records in Siebel.

How it Works

The solution begins with the existing inbound email workflow, which creates an action record and an attachment new record for each incoming email with an attached Excel file. The Business Service Server Script triggers on the "Write Record" event, invoking a custom REST API deployed in Sai-ENT container. This API takes the action ID and attachment ID as input and uses Siebel's attachment REST API to fetch the attachment content.

Once the attachment content is obtained, the custom REST API parses the Excel file and generates JSON data representing the quote information. This JSON data is then passed to a Siebel Server Script, which creates corresponding quote and quote item records using Siebel's Server Script APIs. These records are persisted in Siebel, eliminating the need for manual data entry.

Benefits

The automated quote generation solution offers several benefits to companies and its customers:

- **Increased Efficiency:** By automating the quote generation process, companies can reduce the time and effort required to process customer-submitted quotes.
- **Improved Accuracy:** The solution eliminates the risk of human error associated with manual data entry, ensuring that quote information is accurate and consistent.
- **Enhanced Customer Experience:** Customers benefit from a faster turnaround time for quote processing, allowing them to make informed decisions about their products and services.

Conclusion

In this whitepaper, we've outlined a solution that automates the generation of quotes and quote items in Siebel CRM using the existing inbound email workflow. By leveraging Siebel's Business Service Server Script and custom REST API, companies can streamline its quote processing workflow, improve accuracy, and enhance customer satisfaction. We hope this solution will serve as a valuable reference for other organizations looking to automate their own quote generation processes.

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