

# SIEBEL CRM ON DEMAND SERVICE



*The success of a business depends, in large part, on the quality of customer service that business provides. Siebel CRM On Demand Service gives you the tools you need to enhance your service.*

THE RIGHT TOOLS FOR CUSTOMER SERVICE

- Service request management
- Prebuilt multichannel support
- Solution knowledgebase
- Built-in business intelligence
- Asset and activity management

## Service Request Management

The screenshot displays the Siebel CRM On Demand interface for a Service Request Detail. The page is organized into several sections:

- Contact Information:** SR Number 45362-1175531, Account Matthew Ellis Equipment, Contact Matthew Ellis, Work Phone # 602-456-3200, Email matthew.ellis@matthew\_ellis.equipment.com
- Service Detail Information:** Area Product, Cause Existing Issue, Type Issue, Source Phone, Priority 1-ASAP, Status Open - Escalated, Opened Time, Closed Time, Owner phillips, Reassign Owner checkbox.
- Additional Information:** Subject Equipment Replacement - Fuel Gauge, Description Customer needs assistance in replacing fuel gauge. Manual instructions not clear.
- Solutions:** A table with columns for Solution ID, Title, Status, and Published. One solution is listed: AAB199-PBST, Not getting acceptable compression readings pistons, Approved, Y.
- Open Activities:** A table with columns for Priority, Subject, Activity, Date, Status, and Owner. Two activities are listed: Meeting with engineering (Task, 12/27/2003, Not Started, Art Phillips) and Review warranties (Appointment, 5/11/2004 12:00 PM, Art Phillips).
- Completed Activities:** A table with columns for Priority, Subject, Activity, Date, Status, and Owner. One activity is listed: Discussed with customer (Task, 11/27/2003, Completed, Art Phillips).
- Notes:** A section for adding new notes, with columns for Subject, Private, and Modified By.
- Audit Trail:** A table with columns for Date, User, Field Modified, Old Value, and New Value. It shows changes to Description, Abstract, Status, Priority, and Source.
- Attachments:** A table with columns for Attachment Name, Size (In Bytes), Type, Created By, Modified By, and Last Modified.

Track customer service and support requests in a single data repository. Create, assign, and escalate service requests within the application or with Microsoft

KEY FEATURES

**SERVICE REQUEST MANAGEMENT**

- 360-degree view of account and contact information
- Intelligent service request assignment
- Comprehensive service request information
- Service request assessment scripting
- Customer satisfaction surveys
- Real-time and historical analytics

**SOLUTION MANAGEMENT**

- Real-time knowledgebase
- Scoring of solution effectiveness

**ASSET MANAGEMENT**

- Link products and services to accounts
- Track warranty and contract information

**SIEBEL CONTACT ON DEMAND INTEGRATION**

- Hosted call routing, voice, voice mail, and CTI
- Integrated desktop

Outlook. Robust assignment rules ensure that each service request routes to the most appropriate agent equipped with a comprehensive knowledgebase and complete account history.

**Account Management**

The screenshot displays the Siebel CRM OnDemand interface for an account named 'Pacific Rentals'. The main content area is organized into several sections:

- Key Account Information:** Displays account details such as Account Name (Pacific Rentals), Location (HQ), Parent Account, Main Phone # (206-382-8473), Main Fax # (206-382-8475), and Web Site (www.pacific-rentals.com).
- Account Sales Information:** Shows Account Type (Prospect), Priority (High), Industry (Energy), and Reference information.
- Additional Information:** Provides Billing and Shipping addresses, including city (Boulder), state (CO), zip code (34532), and country (USA).
- Leads:** A table listing potential leads with columns for Full Name, Company, Product Interest, Potential Revenue, Estimated Close Date, Status, and Lead Owner.
- Opportunities:** A table listing sales opportunities with columns for Opportunity Name, Close Date, Revenue, Sales Stage, Forecast, and Owner.
- Service Requests:** A table listing service requests with columns for SR Number, Subject, Priority, Status, Opened Time, Contact, Account, and Owner.
- Notes:** A section for adding and viewing notes, currently showing a private note.
- Open Activities:** A table listing activities such as appointments with columns for Priority, Subject, Activity, Date, Status, and Owner.
- Account Team:** A table listing team members with columns for Last Name, First Name, Role, Account/Contact Access, and Opportunity Access.
- Attachments:** A table listing attachments with columns for Attachment Name, Size (In Bytes), Type, Created By, Modified By, and Last Modified.
- Partners:** A table listing partners with columns for Partner, Primary Contact, Primary Contact Phone, and Role.
- Competitors:** A table listing competitors with columns for Competitor, Primary Contact, Primary Contact Phone, and Role.

Build a deep understanding of target accounts by viewing a complete history of all

your company’s interactions with customers across sales, service, call center, and marketing. Easily track, schedule, and monitor account-related activities by using the intuitive graphical interface.

With Account Management capabilities, you can:

- Display service details in a comprehensive view
- View service requests and open tickets
- Track product and service delivery
- Prioritize service requests
- Analyze service metrics

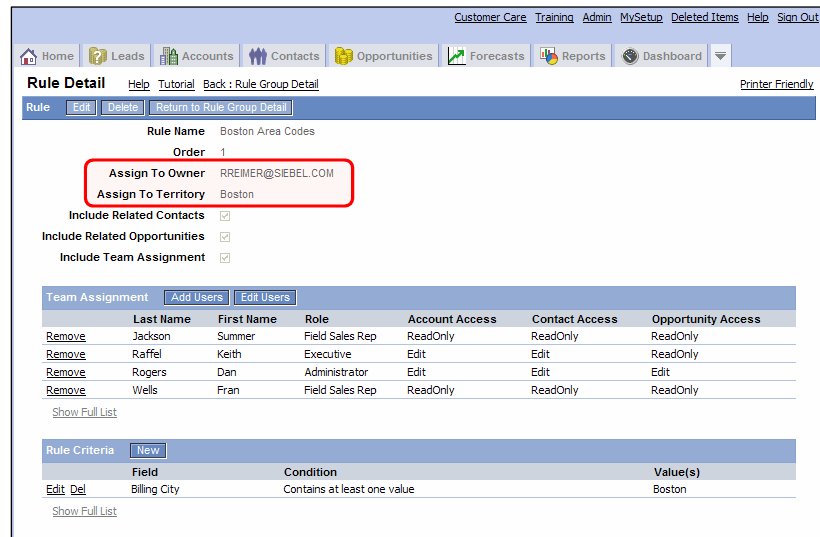
### Call Management

Improve service efficiency and effectiveness by staying highly informed of all customer interactions. Siebel CRM On Demand provides a comprehensive view of every customer and opportunity, including a complete history of all interactions across inbound/outbound calls, e-mails, written correspondence, visits, meetings, and demonstrations.

Call Management lets you:

- Maintain rich contact profiles
- View complete interaction history across touchpoints
- Correspond with contacts via e-mail or phone with the click of a button

### Territory Management



Advanced territory management capabilities in Siebel CRM On Demand let you adjust to rapid change. Using an easy, point-and-click interface, you can automatically route accounts and opportunities to the right territories, sales professionals, and sales teams. You can manage business by multiple criteria,

ensuring you get the right information to the right team member to keep things from slipping through the cracks.

### Product Management

Create and modify a product catalog of your company's products and services to track and manage sales opportunities by product or service across the organization.

Associate products and services to existing accounts, including part numbers, contracts, and warranty information, to capitalize on up-sell and cross-sell opportunities. Create accurate sales forecasts by tracking product and service revenues, including recurring revenue streams.

### Asset Management

Associate one or more products/services with accounts as well as track information such as part number, warranty, and contract details. Create custom fields to support unique asset tracking needs. Effectively respond to service requests and identify new sales opportunities by having easy access to detailed product information.

With Asset Management, you can:

- Increase up-sell and cross-sell opportunities
- Customize fields based on individual preferences
- Quickly address customer inquiries

### Activity Management

The screenshot shows the Siebel CRM OnDemand interface for editing an appointment. The top navigation bar includes Home, Calendar, Service, Campaigns, Accounts, Contacts, Opportunities, Forecasts, and Dashboard. The left sidebar contains a search bar and a 'Create' menu with options for Appointment, Contact, Opportunity, Account, Lead, Service Request, and Solution. The main content area is titled 'Appointment Edit' and includes a 'Appointment Details' header with 'Save', 'Save & New Appointment', and 'Cancel' buttons. Below this, the 'Key Appointment Information' section contains fields for Owner (Art Phillips), Location (The Palm), Subject (Lunch with Robert Johnson (CEO)), Start Time (5/11/2004 12:00 PM), Type (Meeting), and End Time (5/11/2004 01:00 PM). A 'Private' checkbox is also present. The 'Related Items' section lists Account (Pacific Rentals), Contact, Opportunity, Lead, Campaign, and Service Request, each with a search icon. The 'Additional Information' section shows 'Modified By' as Art Phillips on 5/11/2004 at 05:50 PM and a 'Description' field containing 'Reservation under "Phillips." Parking in side lot.'. A red asterisk indicates required fields. The footer contains navigation links and copyright information for Siebel Systems, Inc.

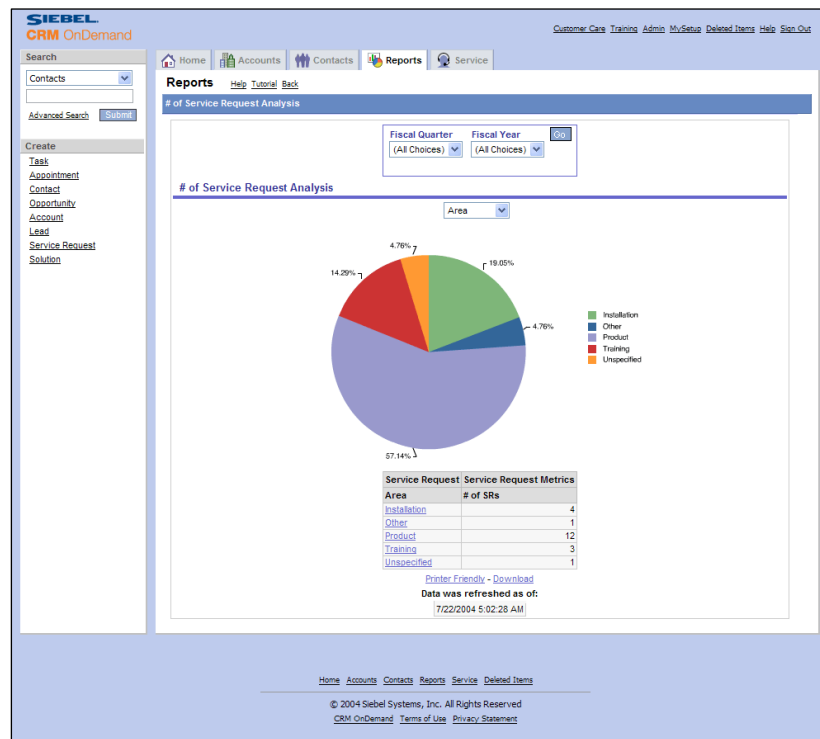
In any sales process, certain activities must be completed within tight deadlines. Siebel CRM On Demand centralizes RFPs, quotes, contracts, callbacks, and meeting details in one easy layout to accelerate the process.

Create prioritized to-do items on your home page and never miss an important deadline. Managers have complete visibility into staff activities to make sure everyone is staying on task.

Activity Management lets you:

- See all sales leads and appointments
- Stay current on accounts
- Create personalized to-do lists
- Prioritize activities based on deadlines or revenue potential
- Gain insight into staff workload

### Service Analytics



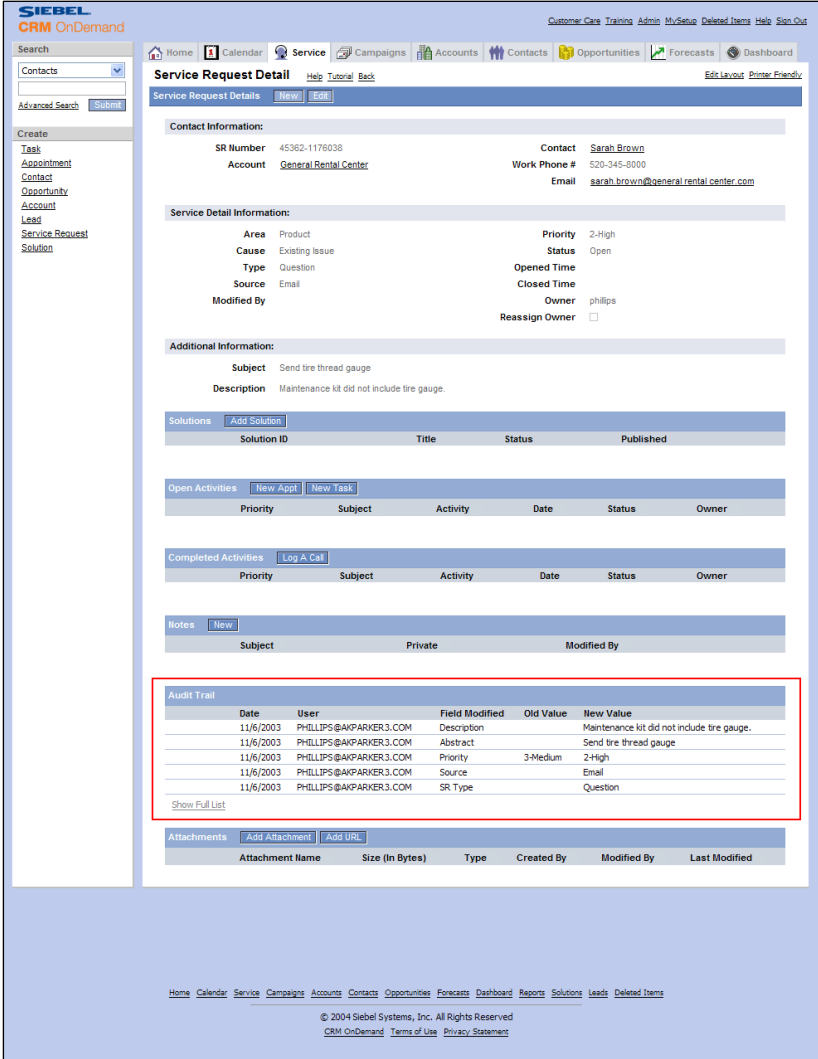
Receive actionable data for your customer service interactions. Siebel CRM On Demand service analytics provides in-depth knowledge into service request activity, resolution trends, service revenue, costs, and customer satisfaction.

Monitor employee performance and activities to ensure the highest service levels.

Service Analytics capabilities help you:

- Enhance customer loyalty
- Identify revenue opportunities
- Spot customer trends
- Monitor service requests by channel

**Audit Trail**



Siebel CRM On Demand automatically records changes made to fields within the application, ensuring data security and integrity across the organization. The audit trail captures the user names, date, time, old value, and new value for each audited transaction.

Auditing rules can be customized for a specific amount of time or remain active indefinitely.

**Knowledgebase**

The solutions knowledgebase provides sales and service agents with consistent, preapproved answers to commonly asked customer questions. Searchable knowledgebase answers can be added easily to outbound e-mail messages or read over the phone by call center agents.

The Web-based user interface can be organized in hierarchical categories, allowing for quicker access to FAQs.

With the knowledgebase, you can:

- Increase first-call resolution
- Improve customer satisfaction with “one and done” assistance
- Gain real-time access to account information

## Calendar/Task Management

The screenshot displays the Siebel CRM OnDemand interface for Calendar/Task Management. The main window is titled 'Daily Calendar' for the date 5/11/2004. It features a list of appointments with columns for time, subject, and edit options. The appointments include 'Lead Qualification Call', 'Meeting Preparation', 'Lunch with Prospect', 'Customer Presentation', 'Account Review with Sales', 'Team', and 'Forecast Conference Call'. To the right, there is a 'Calendar View' showing a grid for May and June 2004. Below the calendar is an 'Open Tasks' section with columns for 'Due Date' and 'Subject', listing tasks such as 'Send brochure', 'Call to follow-up on RFI submission', 'Present latest product update to customer', 'Demonstrate recent changes to the 800LT site', 'Meeting with engineering', 'Notify account team', 'Budget Approval', 'Prepare hard copy materials', and 'Perform research on competitive offerings'. The interface includes navigation buttons like 'Home', 'Calendar', 'Campaigns', 'Accounts', 'Contacts', 'Opportunities', 'Forecasts', 'Service', 'Reports', 'Dashboard', 'Solutions', 'Leads', and 'Deleted Items'. The footer contains copyright information for Siebel Systems, Inc. and links to 'CRM OnDemand', 'Terms of Use', and 'Privacy Statement'.

Schedule appointments, activities, and tasks across sales, service, call center, and marketing functions. Items assigned to other team members automatically appear on their calendars. Managers can review calendars of people covering an account to see who has been interacting with the account and how frequently.

Calendar and Task Management let you:

- View all activities in a central repository
- Drill down for more details on an activity
- Sync activities with Microsoft Outlook (bidirectional)

## Product Catalogs

Maintain complex product catalogs in CRM On Demand, including hierarchical classification of products and services. Guarantee consistent messaging and product availability throughout the entire organization.

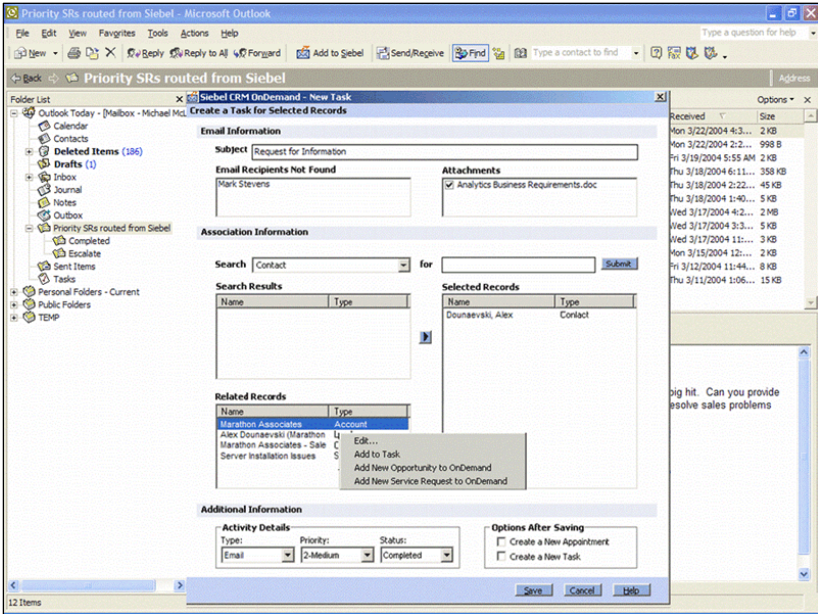
## Outlook/Palm Synchronization

Bidirectional synchronization allows contacts, appointments, and tasks created in Microsoft Outlook to appear in Siebel CRM On Demand and vice-versa. This useful feature minimizes redundant entries and enhances coordination across your organization with up-to-date information.

Outlook/Palm synchronization:

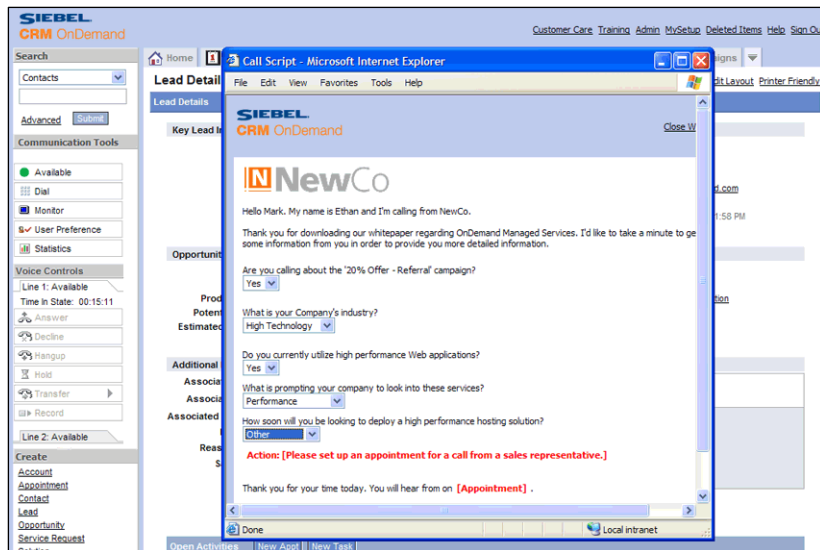
- Extends CRM beyond the office
- Provides 24/7 access to customer data
- Eliminates redundant entries

**Outlook E-Mail Integration**



Siebel CRM On Demand lets you associate inbound and outbound e-mails, including attachments, with contacts, leads, accounts, opportunities, and service requests. Capture new e-mail addresses, search for address information, and edit and create new records in Siebel CRM On Demand. All it takes is a single click while working within Microsoft Outlook.

## Call Scripting



Give your customer service and telesales teams and third-party vendors the power of customizable call scripts. Make sure your agents are asking the most appropriate questions at the right time by using customized workflow. Information captured on the call is collected directly in Siebel CRM On Demand, ensuring high-quality data and more-effective calls outcomes.

Call Scripting:

- Reduces agent training time
- Provides drop-down choices that change dynamically based on customer response
- Supports personalized interactions based on existing record data
- Facilitates up-selling and cross-selling
- Does not require third-party software

## Customization

Customer Care Training Admin MySetup Deleted Items Help Sign Out

Home Leads Companies People Deals Forecasts Reports Dashboard

**Rename Objects** Help Tutorial Back: Application Layout Printer Friendly

Rename Objects Default Save Cancel Translation Language: English-American

To change object names, first select a Translation Language from the drop-down list, and then update the Display Name fields with the new name. Select the Propagate check box to indicate that a new name needs to be translated to other languages. Then you can select another language from the drop-down list and enter the translated equivalent of the new name.

Default Name	Display Name/Singular	Display Name/Plural	Display Name/Short	Propagate
Account	Company	Companies	Companies	<input type="checkbox"/>
Activity	Activity	Activities	Activity	<input type="checkbox"/>
Asset	Asset	Assets	Asset	<input type="checkbox"/>
Attachment	Attachment	Attachments	Attachment	<input type="checkbox"/>
Campaign	Campaign	Campaigns	Campaigns	<input type="checkbox"/>
Competitor	Competitor	Competitors	Competitor	<input type="checkbox"/>
Contact	Person	People	People	<input type="checkbox"/>
Forecast	Forecast	Forecasts	Forecasts	<input type="checkbox"/>
Lead	Lead	Leads	Leads	<input type="checkbox"/>
Note	Note	Notes	Note	<input type="checkbox"/>
Opportunity	Deal	Deals	Deals	<input type="checkbox"/>
Partner	Partner	Partners	Partner	<input type="checkbox"/>
Product	Product	Products	Product	<input type="checkbox"/>
Service Request	Service Request	Service Requests	Service Requests	<input type="checkbox"/>
Solution	Solution	Solutions	Solutions	<input type="checkbox"/>
Territory	Territory	Territories	Territory	<input type="checkbox"/>

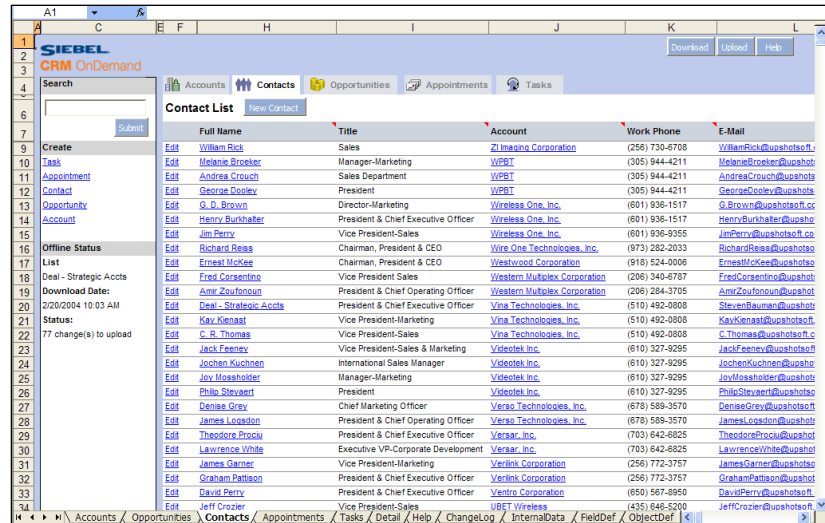
Default Save Cancel

Tailor your hosted CRM solution with powerful new customization capabilities. Create customer fields and reports, using dozens of fields and multiple logical arguments.

With the Customization features, you can:

- Automatically rename tabs and objects throughout the solution
- Pass data to an external system by creating a hyperlink
- Create tailored home pages
- Define role management, user-privileges data access, and screen layouts
- Run reports and analyses from customized fields

**Offline Access**



Take Siebel CRM On Demand on the road. Offline functionality allows access to accounts, contacts, opportunities, tasks, and appointments without internet access. Modify or create new sales opportunities and synchronize updates when reconnected to the internet in the office, at home, or in a hotel.

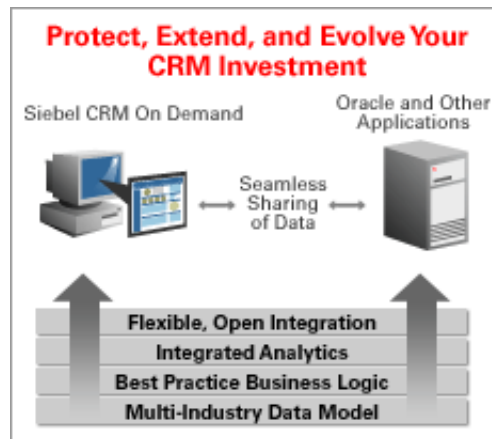
**Multicurrency Support**

Siebel CRM On Demand supports multiple currencies across the same company, including the dollar, Euro, Pound, and Yen. Create a default currency based on location or individual preference. When generating forecasts, Siebel CRM On Demand will automatically convert all opportunities to the default company currency to ensure accurate, single-currency sales forecasts. Multicurrency support lets you transact, forecast, and report in any currency.

**Multilanguage Support**

To address the needs of a global workforce, Siebel CRM On Demand supports English, English-U.K., German, Spanish, French, and Italian languages. Regional support offers country-sensitive address and ready-to-dial phone formatting as well as localized number, time, and date formats.

## Oracle Enterprise Integration



Siebel CRM On Demand delivers the industry's first fully hosted enterprise application integration server. With prebuilt integrations to popular applications such as Oracle business applications installed on-premises, this solution enables organizations to rapidly extend their existing Oracle CRM deployment to a hybrid model without resorting to traditional time-consuming and expensive custom development efforts and without having to deploy sophisticated integration servers on their own premises.

By delivering true real-time integration capabilities, Siebel CRM On Demand's hosted integration server goes far beyond simple data sharing and uniquely enables companies to deploy end-to-end business processes across applications.

In addition, Siebel CRM On Demand provides a comprehensive set of flexible Web services APIs based on XML/SOAP standards to enable custom integrations between Siebel CRM On Demand and other applications, further reducing the cost and complexity of custom integration.

With the prebuilt integration capabilities, you can:

- Get increased flexibility for sales, service, and marketing
- Extend CRM functionality to remote offices
- Increase ROI with a single-vendor relationship
- Unify business processes
- Benefit from a single data model between hosted and on-premises applications

### Web Services On Demand

Oracle Web Services On Demand lets you customize, extend, and integrate Siebel CRM On Demand using industry-standard development tools, including IBM WebSphere, Microsoft .NET, and BEA WebLogic, to create custom integrations with systems such as financial, order management, or e-commerce applications.

With these tools, developers can leverage a comprehensive set of XML/SOAP APIs

to programmatically access Siebel CRM On Demand application logic, business logic, and data services for retrieval, modification, creation, deletion, and synchronization of information.

Web Services On Demand is available free of charge as part of the Siebel CRM On Demand service.

With Web Services On Demand, you can:

- Reduce the cost and complexity of application integration
- Get a single view of data across your enterprise
- Leverage significant cost advantages of a hosted solution

### **Learn More About Siebel CRM On Demand**

For more information, CONTACT

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