

SIEBEL QUOTE & ORDER CAPTURE



Oracle's Siebel Quote & Order Capture provides the capabilities to assist customers, partners, and employees as they select the right products, negotiate the best prices, and ultimately capture the perfect order.

KEY FEATURES

- Dynamic product selection
- Product recommendations
- Dynamic pricing
- Product promotions
- Pricing waterfall
- Eligibility and compatibility
- Product configurator
- Discount negotiation
- Contract pricing enforcement
- Quote and order validation and approval
- Web Services
- Favorites
- Needs Analysis
- Built-in capture process
- Asset based ordering
- Shipping information

Effectively Manage the Entire Order Lifecycle

Quote and order lifecycle management enables companies to better serve customers and reduce operational costs by efficiently processing new orders, updates, returns, and cancellations across front-office and back-office applications. This enables companies to achieve consolidated, customer-centric order management in near real time, allowing customers, partners, and employees to effectively manage interactions throughout the order lifecycle.

With Oracle's Siebel Quote & Order Capture solution, you can:

- Quickly bring new products, promotions, and pricing to market
- Rapidly capture orders
- Ensure the perfect order
- Offer personalized, accurate pricing
- Improve cross-sell and up-sell conversions
- Understand pricing using price waterfall

Effective management of the quote and order lifecycle will allow companies to realize benefits that include:

- *Reduced operational costs* through streamlined order entry, reduced order errors and reduced customer inquiries
- *Increased revenue* through targeted promotions, margin maximization and faster order processing
- *Enhanced customer experience* through selection of the right product at the right price, personalized catalogs and accurate order promising

Reduce Operational Costs

Decrease Deployment Time with Built-in Capture Process

A complete quote-capture process based on industry best practices is included and can be easily modified through flexible declarative workflows. The built-in quote-to-capture process begins with identifying or capturing customer information, selecting and configuring the products, capturing shipping information, checking availability and reserving products (integration with ATP systems), negotiating terms and pricing, capturing and validating payment methods, validating and

approving the quote or order and finally submitting the order for fulfillment.

Increase Re-use of Business Logic with Web Services

Over 40 commerce related web services are included that support catalog, configurator, shopping cart, asset and network based ordering and provide the capability to reuse business logic across multiple selling channels. The web services also support the ability write once, deploy everywhere by allowing web service configuration through a common administrative environment. This capability substantially reduces development/maintenances costs and speeds deployment cycle times.

Reduce Order Errors with Configurator

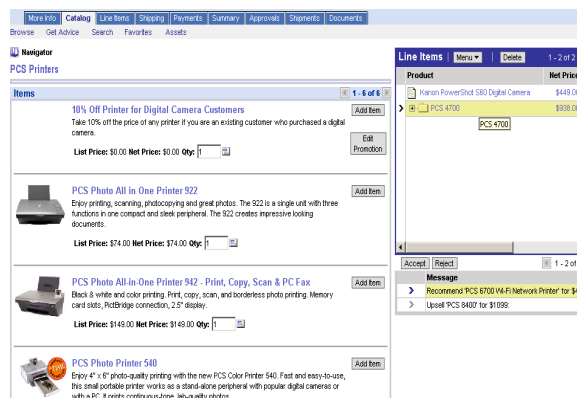
The Product Configurator provides constraint-based product selection capabilities and enables one-click access to embedded configurations of customizable products and the ability to present a product option selection user interface specific to your requirements. These capabilities are enabled while leveraging a rules-based engine to ensure validity of select components and accessories.

Decrease Order Cycle Time with Approvals

The approval process provides the ability to define routing rules, escalation criteria, approving quote and order exceptions, and maintain an audit trail of all approvers, dates, times, and approval state. The automation of quote and order approvals allow eliminates manual approval steps that sales representatives to focus on more value-added activities such

Rapid Product Selection with Dynamic Catalogs

Dynamic Catalogs provide sales representatives with a central user interface to find the right products through search and catalog navigation. An integrated search tool allows users to conduct searches based on product part numbers, product attributes, promotions, pricing, and other product descriptors. This allows users to query and locate products based on customer requirements in the minimal amount of time. Alternatively, catalog navigation enables users to navigate through catalogs, categories, products and promotions within the same view. Additional criteria can also easily be added to search and catalog navigation to ensure only products that are compatible and eligible are shown. Both search and catalog navigation allow for faster order entry by eliminating mouse clicks required to locate the right product.



Find the right product fast with Dynamic Catalogs

Increase Revenue

Increase Average Order Size with Targeted Promotions

Siebel Quote & Order Capture supports actionable up-sell and cross-sell messaging and targeted promotions based upon simple rules that are created by a marketing administrator. For example, the customer service representative (CSR) is automatically prompted to cross-sell batteries and a camera case at a 10% promotional discount when the customer indicates that he or she wishes to purchase a camera. When actionable messages, recommendations and promotions are presented to the user in a timely manner, companies can more effectively find solutions that meet their end customers' needs and more effectively up-sell and cross-sell.

Reduce Revenue Leakage with Price Enforcement

The Siebel Quote & Order Capture Price Management solution provides a flexible, workflow-driven, one-time administration of pricing rules and sequencing that enables consistent discount policies to be applied across the organization. Consistent discount policy enforcement reduces revenue leakage and increases margins. Price Management also includes the ability to establish price approvals that automatically route quotes, orders, and agreements that have exceed discount policy to individuals with the proper discount authority. Automatic routing ensures any quotes or orders with negotiated pricing are processed efficiently.

Optimize Margin Decisions with Price Negotiation

Price negotiation can be based on a specific customer price provided through price enforcement, but can also leverage insight from other opportunities with similar characteristics. Comprehensive dashboards comprised of the key data such as historical transactional pricing waterfalls and competitive data allows users to properly to analyze comparative pricing and make optimum discount/margin decisions. The discount decisions can be applied to an order line item or systematically spread across the individual line items to meet an overall order margin goal.

Reduce Time to Revenue with Contract Pricing

Siebel Price Management can automatically apply the entitled pricing rules as defined in a governing contract. Should multiple contract entitlements be eligible for a quote or order line item, Siebel Price Management also provides the ability to automatically apply the entitlement with the most favorable price. This greatly reduces time to revenue by reducing order cycle time and automates the process of sorting through filing cabinets and documentation to determine a customer's contractual pricing discount.

KEY BENEFITS

WITH SIEBEL QUOTE & ORDER CAPTURE YOU CAN:

- *Reduced operational costs* through faster order entry, reduced order errors and reduced customer inquiries
- *Increased revenue* through targeted promotions, margin maximization and faster order processing
- *Enhanced customer experience* through selection of the right product at the right price, personalized catalogs and accurate order promising

RELATED PRODUCTS

The following products are available from Oracle and enable companies to further enhance their Quote and Order Capture Processes:

- Siebel Sales
- Siebel Service
- Siebel Marketing
- Siebel Analytics

Enhance Customer Experience

Create Personalized Product Selection with Favorites

Siebel Quote & Order Capture Favorites capability enables users to create private and public product templates that can be used as a product selection mechanism for commonly purchased products. This capability eliminates the need for sales agents to individually select products, attributes, and quantities for all future quotes and orders that require products and services included in existing templates.

Match Products to Customers with Needs Analysis

Siebel Quote & Order Capture Advisor provides the ability to create a series of dialogs to gather customer needs and create a matrix to match answers from the dialog to product attributes. During runtime, Advisor uses the dialog to engage the users and gather their input. The inputs are then used to filter, compile, and present products back to the user. This enables sales agents to provide product guidance based on customer requirements and the complete enterprise offering, not just on their current personal product knowledge.

Leverage Customer Asset Information to Personalize Product Selection

Siebel Quote & Order Capture provides the ability to pick a customer's asset within a catalog view. This streamlines the product selection process by providing sales and service agents with the background information they need to create new asset-based sales or augment an existing asset with add-on services.

Set Shipment Expectations Appropriately

Siebel Quote & Order Capture supports shipping parameters at both the line level as well as across an entire order. Shipment parameters include source, shipping method, ship-to address, ship together and, ship complete. This information is provided as a service to external inventory and availability systems to enable data to be provided in the customer context. With relevant shipping information, sales representatives can properly set shipment expectations with customers.

Conclusion

Siebel Quote & Order Capture enables customers to reduce operational costs, increase revenue and enhance the customer experience by providing capabilities that include quickly bringing new products/promotions/pricing to market, rapid order entry, personalized catalogs, complex product configuration, personalized pricing and dynamic cross/up sell recommendations.

Copyright 2007, Oracle. All Rights Reserved.

This document is provided for information purposes only, and the contents hereof are subject to change without notice. This document is not warranted to be error-free, nor is it subject to any other warranties or conditions, whether expressed orally or implied in law, including implied warranties and conditions of merchantability or fitness for a particular purpose. We specifically disclaim any liability with respect to this document, and no contractual obligations are formed either directly or indirectly by this document. This document may not be reproduced or transmitted in any form or by any means, electronic or mechanical, for any purpose, without our prior written permission.

Oracle, JD Edwards, PeopleSoft, and Siebel are registered trademarks of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.