

Customer Quick Reference Guide

For Siebel CRM On Demand Customers

Expect Industry-Leading Support

Siebel CRM On Demand provides two support options.

- **Standard Support.** Standard Support is provided as part of every standard subscription to Siebel CRM On Demand. It includes full access to the self-service Training and Support Center, 24/7 online access, and phone access 6 a.m. - 6 p.m. local time M-F. With Standard Support, all service requests will receive a response within one business day.
- **Gold Support.** Gold Support is provided with additional fees. It includes full access to the self-service Training and Support Center, 24/7 online access, and 24/7 phone access. With Gold Support, all service requests will receive a response within four hours.

Essential Resources

Training and Support Center (TSC)

The Training and Support Center provides centralized access to training courses, implementation tools and templates, technical documentation, and user forums. The TSC also serves as a gateway to the Oracle*MetaLink* support portal where you can create, view, and update service requests and search the knowledgebase for solutions and application downloads. Access to the TSC portal is obtained via the Customer Care and Training links within the Siebel CRM On Demand application.

System Availability and Updates

The main page of the TSC provides around-the-clock access to all system notifications (current outages, planned actions, or diminished services). Users should check status on this page before calling Global Customer Support or creating a service request about a related issue/outage.

Online Support and Training

Context-sensitive online help is provided to all users on every screen of the Siebel CRM On Demand application. Embedded tutorials in the help system provide visual support on how to accomplish key tasks. Subscribers also have access to a rich library of task-based training Webinars available free of charge through the Training and Support Center. To maximize your Siebel CRM On Demand product implementation success and your return on investment, we recommended that your administrator(s), implementation project team members, and users take full advantage of the Webinars, which also contain helpful demonstrations. This training will ensure that your users quickly understand how to use the application and that your implementation team and administrator(s) have the right level of knowledge to effectively support and maintain your service.

This quick reference guide will help you find the answers you need, when you need them.

We strongly recommend the following two instructor-led courses for administrators and appropriate project team members: **Siebel CRM On Demand Administration Essentials** and **Siebel CRM On Demand Advanced Analytics Workshop**. Descriptions, course schedules, and costs for both courses can be found on the Training and Support Center or on the Oracle University Web site—education.oracle.com. Additionally, customized Web-based and onsite training is available through our Siebel CRM On Demand Professional Services organization. For more information about Siebel CRM On Demand Professional Services and Training, contact us at crmondemandconsulting_vw@oracle.com or by calling **866.906.7878**.

Useful Web Sites

Siebel CRM On Demand: oracle.com/crmondemand
 Siebel CRM On Demand Services and Support: oracle.com/crmondemand/training_support
 Oracle University: education.oracle.com
 Oracle OpenWorld: oracle.com/openworld
 Oracle Magazine: oracle.com/oramag

Working Effectively with Global Customer Support—Siebel CRM On Demand (GCS)

Things You Need to Know

A Service Request (SR) is a request by a licensed subscriber (users, administrators, etc.) for help with a technical or nontechnical problem. Service requests can be created to ask how-to questions, submit change requests, or report application issues (defects, outages, or performance). SRs should be logged using the Training and Support Center and Oracle*MetaLink* portals available from within the Siebel CRM On Demand application. When needed, users may also dial directly into our support team to create or get a status update on a current SR.

Severity Levels: Service requests are assigned a severity level according to the impact on your business. Please use the following definitions to assess your situation and provide the appropriate severity level when logging an SR. A support engineer will also confirm that the correct severity level has been assigned based on the information provided in the service request.

- Severity 1 - Critical:** Production Environment Down (mission-critical data corrupted, critical documented function not available, system hangs indefinitely, system crashes)
- Severity 2 - Significant:** Significant Issues (severe loss of service, important functionality unavailable with no workarounds, operations can continue in restricted fashion)
- Severity 3 - Standard:** Incorrect Behavior, Workaround Available (minor loss of service, inconvenience, may require workaround)
- Severity 4 - Minimal:** Information Request / Clarification (information request, enhancement request, documentation clarification, no impact on service)

Primary Contact: Every organization must have a designated Primary Contact. This person will receive vital notifications about your instance of Siebel CRM On Demand. Siebel CRM On Demand will automatically designate the first person gaining access to the service as your Primary Contact. Organizations wishing to validate whether they have an up-to-date Primary Contact or to have someone else designated should review their company profile per the following posting on the Siebel CRM On Demand Sign In page: oracle.com/crmondemand/login/index.html

Attention Administrators: To ensure the right individuals within your company receive key communications regarding system upgrades, release information, training and support notifications, and other important notes, please take a moment to update your Primary Contact information and user contact preferences.

- Update Primary Contact: Click [Admin > Company Administration > Company Profile > Edit Company Key Information](#)

- Update User Contact Preferences: Click [Admin > User, Group & Role Management > User Management > Drill down to User Detail > Update the Contact Preferences](#) section

One-Time Registration to the Oracle*MetaLink* Support Portal

First time users of the Oracle*MetaLink* support portal must do the following in order to log / view SRs or access solutions:

- Click the Customer Care link from within Siebel CRM On Demand to access the Training and Support Center.
- Click either the Create a Service Request or Search Knowledge link to access the Register Now! button.
- The Register Now! button will take you to a short registration page. Here you enter the e-mail address associated with your Siebel CRM On Demand user account and select a password. (For your convenience, we suggest using the same password you use to login to Siebel CRM On Demand.) Please revisit this whenever your company domain name or e-mail addresses change.
- You are now registered and ready to sign in.

Search Solutions

Within the Oracle*MetaLink* portal, you can resolve many of your technical issues quickly by searching for different types of information (solutions, downloads, or tools/templates). You can do this by using the features found within the Knowledge tab. Also, as you create a service request, the portal will automatically return solutions that match the values you selected when categorizing your SR. This way, you can ensure you see all the available solutions and potentially resolve your question before committing your SR to support. There are also many advanced search features that help you find information based on product areas, exact phrases, etc.

Create, View, and Update a Service Request (SR)

Log in to the Oracle*MetaLink* portal by selecting the Create a Service Request or Search Knowledge link within the Training and Support Center. Select the Sign In button to log in. Within the Oracle*MetaLink* support portal you can create, view, and update SRs.

Create

To create an SR, go to the Service Request tab and select the Create an SR link. You will be guided through a three-step process to create the SR. The first step will help you identify the issue by categorizing the SR. The second step will provide any available solutions based on your categorization. If no solution can be found, the final step will ask you for additional detail before you submit the SR to the support team. Once the SR is submitted, you will be given the opportunity to add any attachments or updates that may also be needed.

GCS will respond to all SRs as quickly as possible and based on the support option your organization chose and the priority level of the SR. We will attempt to resolve all service requests promptly. To keep you informed of the progress of your SR, you will automatically receive e-mail notifications whenever new activity is added to your SR (unless you deselect the monitoring options when creating the SR).

View and Update

To view the status of your service request(s), go to the Service Request tab and view your SRs under the My SRs section. You can select the Show Full List button to see all the SRs you have created and to perform specific searches for SRs based on many criteria. Click the SR title to go to the SR Detail - View & Update page, where you can view updates, related change requests, and attachments. This is also the location on the SR where you can add updates, attachments, close/reopen an SR, or complete a survey. Designated Siebel CRM On Demand administrators can also request to view company SRs (for one instance within the service) by submitting an SR to GCS.

Global Customer Support— Siebel CRM On Demand Support Phone Numbers

North America

United States and Canada: Toll Free: 866.853.8521, Toll: 801.258.2456
Mexico: 001.866.678.9037

Asia Pacific

Australia: 0011.800.08538521	Pakistan: 00.800.01.001.866.435.7705
China: 10800.130.1178	Philippines: 1800.1.111.0178
Hong Kong: 001.800.08538521	Singapore: 001.800.08538521
India: 000.800.100.1148	Sri Lanka:
Indonesia: 001.803.1.002.0896	Colombo: 2.430.430.866.435.7705
Japan: 001.010.800.08538521	All Other: 112.430.430.866.435.7705
Korea: 00798.1.1.002.0896	Taiwan: 00801.10.4139
Malaysia: 1.800.81.3753	Thailand: 001.800.11.002.0896
New Zealand: 0800.447171	Vietnam: 1.201.0288.866.435.7705

Europe

Belgium: 0800.7.5630	Luxembourg: 800.2.6576
France: 00.800.08538521	Netherlands: 0800.022.6451
Germany: 00.800.08538521	Spain: 00.800.08538521
Italy: 00.800.08538521	United Kingdom: 00.800.08538521

Important Dialing Instructions: All numbers listed above for countries outside of the United States and Canada are UIFN (universal international freephone numbers). **Please dial all numbers exactly as listed.** These numbers are freephone and subsequently will not cause any charges to your organization.

Use the Escalation Process

Global Customer Support—Siebel CRM On Demand (GCS) will make every attempt to resolve all reported problems promptly. In the exceptional cases where an escalation is necessary, the escalation process should be used to ensure that additional attention is provided to the issue.

To escalate a service request:

- Call the main technical support phone number for your region and request that your issue be escalated.
- A technical support manager will contact you. If either you or GCS judges that a situation requires a higher level of resource or communication than normal, both you and GCS should expect to dedicate whatever technical and managerial resources are deemed necessary to resolve the problem.
- GCS will assign an escalation manager as the communication focal point for the issue.
- All plans and status will be relayed through the escalation manager to ensure prompt, accurate, and complete communication.

For more information on the escalation process, review the available documentation in the Oracle *MetaLink* Knowledgebase, Doc ID: Note:199389.1, Subject: Escalating Service Requests with Oracle Support Services.

Best Practices for Service Requests

- **Search** the Oracle *MetaLink* knowledgebase to determine if a resolution to your issue already exists or find the recommended diagnostic steps to help you troubleshoot your issue.
- **Identify** the problem area precisely and attempt to isolate the issue. Verify and determine the precise steps to reproduce the issue.
- **Use** the Training and Support Center to keep updated on known system issues or planned maintenance. These are posted in the System Notifications section.
- **Complete** the fields in the Oracle *MetaLink* support portal carefully when logging a service request. Select the appropriate product type, area, and

sub area. Also, providing a clear and complete problem description will allow efficient routing of your issue to the best technical resource, help the support engineer isolate the issue, and speed resolution.

- **Provide** any resolution steps already taken, diagnostic data, or symptoms that may allow the support engineer to resolve your issue quickly. Also, attach any pertinent screen shots or documents to your service request. Including user ID and date/time information is extremely helpful.
- **Take** advantage of Oracle's transactional surveys by providing your honest and constructive feedback. Our management team reviews all comments and follows up on any low scores received so that we can continually improve the level of service we offer you.

Other Things You Should Know

Provisioning Your Instance

Siebel CRM On Demand is much different than typical business applications because Oracle hosts it. Your version of Siebel CRM On Demand is commonly called an instance, and it resides on a pod. This pod holds your data. It will be multitenant (more than one organization on one pod) or single-tenant (only one organization on one pod) depending on the license your organization purchased.

As we provision your organization on an instance, there are key pieces of information that will help us maximize performance for your organization and other organizations on your pod. These include expected number of users, languages, data volumes, transactional reporting requirements, complex integrations, and non-Oracle customizations. Any significant changes in these areas over time can also impact performance of the pod once you are in production. Because of the potential impact on performance, we expect our customers to communicate this information to Oracle on a timely and regular basis. If you are unsure whom to contact, please submit an SR.

Maintenance Windows and Other Outages

Regular maintenance windows have been established for all multitenant pods to ensure maximum ongoing performance. These windows have been established to minimize downtime and impact on users across the organizations on the pod. For single-tenant subscribers, maintenance windows are still required, but they are established jointly with your administrator. Information about maintenance windows can be found on the home page of the Training and Support Center.

Occasionally, other planned outages will occur as we continue to work to maximize performance. On rare occasions, an unplanned outage may occur. Our engineers will make every effort to get the system up and running as quickly as possible. For any planned or unplanned outage, information will be made available on the home page of the Training and Support Center, in the System Notifications section.

New Releases / Upgrade Schedules

Information about upgrades and new releases will be e-mailed to the Primary Contact in your organization. It will also be posted on the Training and Support Center.

Staging Environments

There is a staging environment that matches each production environment. The purpose of the staging environment is different with a hosted application than with traditional business applications. Its primary purpose is as a test bed for Oracle engineers for upgrades, problem resolution, etc. It has not been tuned to ensure the same level of performance as the Siebel CRM On Demand production environment. Oracle does provide this staging environment to customers as a benefit, but always on an "as is" basis because there are significant limitations on its use for things such as testing and training. Oracle provides no guarantees on up time, no guarantees on availability at specific times, no guaranteed refreshes (though these are planned to occur quarterly), and no tool to migrate configurations from staging to production.

Testing and Training Suggestions

The Initial Launch: When you have limited data in production and few production users, there is no reason why you shouldn't consider doing your testing and training in your production environment. You can clean out the data when you are finished.

Subsequent Launches: If you have subsequent launches, the situation can involve significant amounts of data and end users reliant on the service. You have several options to consider here.

- You can use the staging environment recognizing the above limitations.
- You can use your production instance recognizing the potential to impact real production usage—corrupting data, slowing performance, etc.
- You can purchase a secondary production instance/company with which you have better availability, but you need to handle your own configuration, administration, and data management; you should also recognize the potential to impact real production usage.
- For Web Services testing, using the staging environment is suggested for testing to minimize impact on production; the challenges of configuration, administration, and data management still exist.

Account Management

Oracle provides account management services for an additional fee. For larger implementations with complex requirements and administrative needs, experienced Oracle personnel can be an invaluable resource to help mitigate risk and maximize return on investment. Please call [866.906.7878](tel:866.906.7878) for more information.

Basic Troubleshooting

Problem logging in?

1) Ask yourself these questions:

- Can you get to other Web sites?
- Can you get to oracle.com without using your bookmarks?
- Can you get to sso.crmondemand.com without using your bookmark?

2) Clear cookies and cache and try these steps again.

3) Log an SR with all these details.

Problem using a feature?

1) Ask yourself these questions:

- Have you ever been able to use this feature?
- Is there an error message on screen? If so, note the details.
- Has anything changed in your IT world?

2) Log an SR with all these details.

If You Still Need Help

For Online Help: Select the Help link on any Siebel CRM On Demand page.

Siebel CRM On Demand Training: Go to the Training and Support Center.

Implementation Best Practice Tools and Resources: Go to the Training and Support Center and look for Tools and Templates.

Professional Services and Training:
crmondemandconsulting_vvw@oracle.com

Sales: [866.906.7878](tel:866.906.7878).

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