UPK PRE-BUILT CONTENT FOR: SIEBEL CRM 8.1

Oracle’s User Productivity Kit (UPK) is a collaborative content development platform that drives end-user and project team productivity throughout all phases of the software ownership lifecycle. UPK pre-built application specific content provides significant additional benefit beyond the UPK Developer for enterprises deploying Siebel CRM applications.

UPK Application Content: “As Delivered” System Process References

The value of UPK pre-built application content starts from the premise that implementation project teams can save substantial time and labor by leveraging UPK application content as baseline reference system process flows first and then iterating to capture specific business process requirements. The savings can be substantial – project team resources typically dedicated to the preparation of system test data, storyboarding, and process standardization can be greatly reduced.

Mirrors Oracle Application Development Methodology

Key to the value of UPK application specific content is the fact that it is authored in tight collaboration with the actual developers who wrote the code, thus creating content which accurately reflects industry best practices with detailed conceptual information.

Delivering Value Throughout the Software Lifecycle

The value of UPK application content has relevance in many phases common to software implementation projects. For example, early on in the project lifecycle, UPK play back capabilities allow implementation leads to educate themselves on the delivered system process flows (vanilla functionality) of the new application without having to actually configure a “sand-box” environment, mitigating costs associated with labor and hardware and reducing the new functionality ‘learning curve.’
Eliminate Dedicated Instances To Analyze Delivered Functionality

Once the delivered functionality and process flows of the new application are understood, the project team can use the UPK content as an aid to do the fit-gap analysis. For this phase of the project lifecycle, the functional expert visually moves through a UPK simulation – leveraging the application specific content - while noting in the test document the configuration and/or customizations necessary to achieve the desired business outcome.

Customizing Pre-Built Content

Over the course of an implementation or upgrade, the UPK pre-built content can evolve until it mirrors the final deployed application. The existing pre-built content can easily be modified using the UPK Developer to capture the configuration changes or steps in the new process. UPK’s re-record feature also enables a guided recapture of screens and steps in the application so your UPK content reflects the final state of your application.

Use the UPK Developer to easily customize the content to match your organization’s needs. The UPK Content products contain the following sections:

Customer Hubs
- Administering Universal Customer Master
- Administering Siebel Data Quality
- Creating Survivorship Rules
- Managing CRM Data
- Managing Transaction History
- Managing Relationships

Customer Order Management
- Quote and Order Management
- Administering Products and Catalogs
- Administering Pricing

Field Service
- Managing Service Requests
- Managing Activities
- Managing Contracts
- Managing Entitlements for Contracts Pricing

Fundamentals for Siebel CRM Base
- Navigating Through a Siebel Application
Managing Records
Modifying Records
Organizing Records
Using iHelp
Retrieving Information Using Queries
Retrieving and Organizing Information with Reports
Using the Task User Interface
Sharing Information in a Siebel Application
Managing the Calendar
Working with Calendar Activities
Working with To Do Activities and Resources
Managing Calendar Alarms
Setting Display Options
Setting Preferences
Customizing Screen and View Tabs
Customizing the Calendar
Managing Quick Fill Templates
Working with Keyboard Shortcuts
Using Help

**Loyalty**
Creating a Loyalty Program
Creating Promotions
Setting Up Airline Redemption Pricing
Using Loyalty Member Services

**Marketing**
Planning and Budgeting for Marketing
Creating Marketing Programs
Creating Offers
Creating and Executing Campaigns
Managing Lists

**Partner Manager**
Enrolling a New Partner
Working with Partner Programs
Reviewing Applications to Partner Programs
Administrating Partner Programs
Using CHAMP Planning
Sharing Data with Partners
Managing Design Programs
Working with Deal Registrations

**Sales**
Performing Account Management
Performing Contact Management
Performing Opportunity Management
Managing Opportunity Forecasting
Using the Target Account Selling Module
Creating Account Plans Using Enterprise Selling Process
Creating Portfolio Plans Using Portfolio Management Process

**Territory Management**
Setting Up the Sales Force
Setting Up the Alignment
Running and Activating the Alignment

**CONTACT US**
For more information on UPK and application specific content for Oracle application product families go to [http://www.oracle.com/goto/upk/user-productivity-kit.html](http://www.oracle.com/goto/upk/user-productivity-kit.html).

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