Siebel Usability Best Practices
Making Siebel Easy to Use

Madhuri Kolhatkar
Director of Customer and User Experience Management
The following is intended to outline our general product direction. It is intended for information purposes only, and may not be incorporated into any contract. It is not a commitment to deliver any material, code, or functionality, and should not be relied upon in making purchasing decisions. The development, release, and timing of any features or functionality described for Oracle’s products remains at the sole discretion of Oracle.
Agenda

• Introduction to UX Direct
• Why is Usability Important for your Implementation?
• How to apply Siebel Usability Best Practices to your current implementation?
• How to leverage with new add-ons modules and applications?
• Key takeaways
Introduction to UX Direct

• Oracle Applications User Experience is launching a new program for our customers and partners
• Distribute and share Product Specific Usability Best Practices
• Enable the implementation team to incorporate usability into the development cycle
• Incorporate our Usability Best Practices when you upgrade to extend your applications
Why is Usability Important?

• Business Efficiency
  • Customers expect enterprise applications to make them competitive and efficient
  • If the business doesn’t trust its IT systems to work quickly and accurately, it will want to throw the system out

• Employee Productivity
  • End-users expect to complete their tasks successfully and quickly
  • End users expect to be confident and satisfied with using the system

• Information Accuracy
  • Incorrect or missing data, or data in the wrong fields will slow down or stop a business process
  • Manual intervention required – always more expensive

Usability is essential to make your business successful
Customer Implementation Cycle
Introducing Usability Best Practices

TEST
- Measuring productivity gains before/after
- Conducting usability testing

BUILD
- Tailoring your applications
- Validating with users

DEPLOY
- Sharing UX success stories with end users

PLAN & ANALYZE
- Adding UX in Requirements
- Understand users and tasks
- Identifying productivity needs

DESIGN
- Creating concepts and prototypes
- Applying UX Best Practices
- Validating with users

End Users
Top 5 Usability Principles – Must Know

1. Allow the users to achieve their goals and tasks as quickly, efficiently and accurately as possible

2. Make the application enjoyable and satisfying to use

3. Make the application easy to learn and remember

4. Allow users to avoid making errors and make it easy to recover from errors

5. Automate tedious and repetitive tasks
Siebel Best Practices
Siebel Best Practices
Navigation – Getting Started

Problem:
Too much navigating to get to the initial view and record to start work

Solutions:
1. Train users on the User Profile Preferences, Behavior view, Startup View field setting.
2. Train users to drag and drop key records and views onto their desktops, into emails, into the Microsoft Windows Start menu or onto the Microsoft Windows task bar.
3. Configure a launch pad to store all the favorite start up views and records.
4. Reconfigure home pages to make them more dynamic and useful or remove them altogether.
Navigation – Startup View
Navigation – Drag and Drop Bookmarks
Navigation – Launch Pad
Navigation – Dynamic Home Pages

Monthly Periodical vs. Daily Newspaper
Navigation - Confusing

Problem:
Too confusing to find the views needed to do my work

Solutions:
1. Train users to complete the User Profile Preferences, Tab Layout view, and Show/Hide View menu icons.
2. Train users on the thread bar.
3. Reconfigure applets into consolidated views so that users can complete a single business process without changing views or screens.
4. Reconfigure views and navigation menus so that links are not the main navigation mechanism within a single business process.
5. Configure Inbox to consolidate approval in workflow requests.
6. Configure iHelp to coach users through steps to complete a business process.
7. Implement task-based UI to streamline and simplify data entry for complex business processes.
Navigation – Tab Layout
Navigation – Thread Bar
Navigation – Consolidate Views
Navigation – Links

Promotions

Promoted Categories SKU’s

Promoted Categories

Corporate
Details
Promotions
Audit Trail
Defaults
Funds
Attachments
Analytics Calendar
Sales Analysis

Details
Post-Event Analysis
Promoted Categories SKU’s
Scenario
Dates
Tactics
Promoted Category Volumes

Promotions

Status
Name
Account
Category
Period
Base Vol
Incr. Vol
Tot Vol
Baseline Revenue
Incr Profit

New
2011 - ABC Mart West CSD Plan
ABC Mart US West (SVP)
CSD (SVP)
2011
675,789
307,317
982,250
57,042.00
($232,662)

New
7 Up
CSD 12oz - 12pk (SVP)
21
3
2
10%
Front Page
Shelf
$252.00
63.85

New
2L Dr. Pepper Fall Finale
CSD 12oz - 12pk (SVP)
40
2
6
15%
Front Page
Off-Shelf
$20,000.00
808.28

New
Dr. Pepper
CSD 12oz - 12pk (SVP)
30
2
4
20%
Front Page
End-of-Isle
$0.00
3.19

CSD 12oz - 12pk (SVP)
20%
Front Page
Shelf
$100.00
$0.10
$0.15
$21,530.00

CSD 2L
10%
Front Page
Shelf
$152.00
$0.00
$0.00
$152.00

12oz 12pk - Dr. Pepper (SVP)
10%
Front Page
Shelf
$0.00
$0.00
$0.00
$0.00
Navigation – Inbox
Navigation – iHelp

**How do I...**

**Create a New Account**

**Enter New Record**

1. Navigate to the Accounts screen > My Accounts View.
2. Click New in the Account list or form.

**Base Information**

3. Enter the base account information.

**Account Team**

4. Assign an account team.

**Account Detail**

5. Add account detail on the Account Profile view.

**Contacts**

6. Add or Create Contacts on the Account Contacts View.
7. Enter Contact profile information.

**ABC Mart Global (SVP)**

**Menu**

**Site**: Global HQ

**Address**: 1440 Avenue of the

**City**: New York

**Zip Code**: 10023

**Parent**: ABC Mart Global (SVP)

**Main Phone #**: (908) 456-8900

**ABC Mart US (SVP)**

**Site**: Stamford

**Parent**: ABC Mart Global (SVP)

**Main Phone #**: (800) 783-0909

**ABC Mart US East (SVP)**

**Site**: Pequannock

**Parent**: ABC Mart US (SVP)

**Main Phone #**: (908) 325-6701

**ABC Mart US West (SVP)**

**Site**: Princeton

**Parent**: ABC Mart US (SVP)

**Main Phone #**: (908) 325-6780

**My New Account Template**
Navigation – Task-based UI

Create Account and SR: Enter Account Details

- Account Name: Oracle Corporation
- Address: 500 Oracle Parkway
- City: Redwood Shores
- Zip Code: 94065
- Account Team: SADMIN
- Main Phone #: (650) 506-7000
- Status: Active
- Account Type: Commercial

Pause | Previous | Next | Cancel
Easier Querying
Querying

Problem:
Too difficult to find information in the system

Solutions:
1. Train users on the Applet menu, Record Count command.
2. Train users on predefined queries, including defaulting the first PDQ.
3. Train users on query operators.
4. Configure key fields for case or accent-insensitive querying for usable yet performant querying.
5. Configure flattened or denormalized list views to make children records more accessible and exportable.
6. Configure Explorer views.
7. Implement secured enterprise search for multifield and unstructured data searches.
Querying – Applet Menu, Record Count
Querying – Predefined Queries
# Querying – Query Operators

<table>
<thead>
<tr>
<th>Operator</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>*</td>
<td>Wildcard operator. Placed anywhere in a string, returns records containing the string or containing the string plus any additional characters at the position at which the asterisk appears, including a space. You cannot use * to find dates. To find words on more than one line in a field, you must use an asterisk (*) to separate the words. You cannot query for control characters or nonprintable characters, such as line feeds (LF) or carriage returns (CR).</td>
<td><em>rang</em> finds arrange, arranged, orange, orangutan, range, ranges, ranging, ring, strange, stranger, strangest, strange, wrangle, and so on. <strong>NOTE:</strong> If performance is poor when you use the asterisk (*), substitute &quot;IS NOT NULL&quot; in your query. This often improves performance, and will return the same sets of records.</td>
</tr>
<tr>
<td>?</td>
<td>Wildcard operator. Placed anywhere in a string, returns records containing the characters specified in the string plus any one additional character that appears at the location of the question mark. ?rag finds drag, craq, or drag. ?type finds type and tape, but not tripe.</td>
<td>?rag finds drag, craq, or drag.</td>
</tr>
<tr>
<td>**</td>
<td>Surrounds a string that, unless modified by a wildcard (* or ?), must be matched exactly. Quotes let you query for a group of words in its exact order with exact upper or lower case lettering.</td>
<td>&quot;Sun Solaris&quot; finds records that contain Sun Solaris in the query field.</td>
</tr>
<tr>
<td>=</td>
<td>Placed before a value, returns records containing a value equal to the query value.</td>
<td>=smith finds all records for which the value in the query field is Smith. It also turns off wildcards within the query value. <strong>NOTE:</strong> For CIAI-enabled fields, if you type &quot;=abc?&quot;, the query becomes a case-sensitive query, because you use an equal sign (=) as an operator in the query.</td>
</tr>
<tr>
<td>&lt;</td>
<td>Placed before a value, returns records containing a value less than the query value.</td>
<td>&lt;8/20/01 finds all records in which the value of the query field is before 20 June 2001. When entering a date, use the format that is specific to your implementation.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Operator</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>&gt;</td>
<td>Placed before a value, returns records containing a value greater than the query value.</td>
<td>&gt;5/31/01 finds all records in which the date in the query field is later than 31 May 2001. When entering a date, use the format that is specific to your implementation.</td>
</tr>
<tr>
<td>&lt;&gt;</td>
<td>Placed before the value, returns records containing a value that is not equal to the query value.</td>
<td>&lt;6/20/01 finds all records in which the date in the query field is not 20 June 2001. &lt;&gt;Paris finds all the records in which the value in the query field is not Paris.</td>
</tr>
<tr>
<td>&lt;=</td>
<td>Placed before a value, returns records containing a value less than or equal to the query value.</td>
<td>&lt;=500 finds all the records in which the value in the query field is less than or equal to 500.</td>
</tr>
<tr>
<td>&gt;=</td>
<td>Placed before a value, returns records containing a value greater than or equal to the query value.</td>
<td>&gt;=500 finds all records in which the value in the query field is greater than or equal to 500.</td>
</tr>
<tr>
<td>NOT LIKE</td>
<td>Placed before a value, returns records not containing the value.</td>
<td>NOT LIKE Smi* finds all records in which the value in the query field do not start with Smi.</td>
</tr>
<tr>
<td>IS NULL</td>
<td>Placed in the query field, returns records for which the query field is blank.</td>
<td>Enter IS NULL in the Due Date query field to find all records for which the Due Date field is blank.</td>
</tr>
<tr>
<td>IS NOT NULL</td>
<td>Placed in the query field, returns records for which the query field is not blank.</td>
<td>Enter IS NOT NULL in the Due Date query field to find all records for which the Due Date field is not blank.</td>
</tr>
<tr>
<td>~</td>
<td>Placed before LIKE and a value with a wildcard operator, returns all matching records regardless of case.</td>
<td>~LIKE Sea* finds all records in which the value in the query field starts with Smi, smi, Smi, and so on. Using this operator might affect performance. <strong>NOTE:</strong> You can enter a CIAI query expression for a contact as follows: [Last Name] ~Like abc*</td>
</tr>
</tbody>
</table>
## Querying – Query Operators

<table>
<thead>
<tr>
<th>Operator</th>
<th>Description</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>AND, and</td>
<td>Placed between values, returns only records for which all the given conditions are true.</td>
<td><code>*performance* AND *memory*</code> finds all records that contain both <code>performance</code> and <code>memory</code> in the query field.</td>
</tr>
</tbody>
</table>
| OR, or   | Placed between values, returns records for which at least one condition is true. | `*performance* OR *memory*` finds all records that contain either `performance` or `memory` in the query field.  
`performance` OR `memory` finds all records that start with either `performance` or `memory` in the query field. |
| NOT, not | Placed before a value, returns only records that do not contain the value. | `*performance* AND NOT LIKE *memory*` finds all records that contain `performance` but not `memory` in the query field.  
NOT (performance OR memory) finds all records that contain neither `performance` nor `memory` in the query field. |
| ()       | Surrounds the values and operators that will be processed first, regardless of the default processing order. | (`sun OR moon`) AND NOT stars returns records that contain `sun` or `moon`, but not `stars`, in the query field. |
| LIKE, like | Placed before a value, returns records containing the value. | (`performance` OR `memory`) AND LIKE (problem) finds all records in which the query field starts with `performance` or `memory` and also includes `problem`.  
**NOTE:** The LIKE operator is case sensitive. To find matches regardless of case, see (`~`). |
Querying – Case-insensitive Querying
Querying – Flat or Denormalized Views
Querying – Explorer Views
Querying – Secured Enterprise Search
Faster Data Entry
Data Entry – Mass Changes

Problem:
Too much work to manage and edit data

Solutions:
1. Train users on the Edit, Change Records command.
2. Train users to use the Edit, Merge Records command. Show users how this command can be used to delete multiple records by merging them and then deleting the remaining record.
3. Configure Reverse Views to enable a child record to be associated with multiple parent records at once, such as with the Employee, Account view instead of the Account, Sales Team view.
Data Entry – Change Records
Data Entry – Merge Records
Data Entry – Reverse Views

![Diagram showing reverse views of data entry]
Data Entry – Confusing View Layout

Problem:
Too frustrating figuring out the uses of fields and buttons

Solutions:
1. Train users on the Text Editor button.
2. Reconfigure applets to remove unnecessary fields.
3. Reconfigure applets to reduce the number of mandatory fields.
4. Reconfigure the location and order of buttons, auto-instantiate them when appropriate, and put them in sequence of the business process.
5. Configure separate views for entering data versus managing and analyzing data.
6. Configure hover functionality to describe what fields are intended for.
7. Train users to lock columns in list views with a double-click.
8. Train users to expand and collapse applets and to toggle between form and list applets with a button (may require configuration).
9. Reconfigure form views using personalization to dynamically display fields based on user attributes.
Data Entry – Text Editor
Data Entry – Unnecessary Fields
Data Entry – Mandatory Fields
Data Entry – Buttons
Data Entry – Separate Views
### Data Entry – Hover

#### Account Promotions

<table>
<thead>
<tr>
<th>Promotion</th>
<th>Name</th>
<th>Promoted Category</th>
<th>Plan</th>
<th>Promotion End Date</th>
<th>Status</th>
<th>Tot Vol</th>
<th>Duration</th>
<th>Lift %</th>
<th>Predict Lift %</th>
<th>Display</th>
<th>Tot Fixed Fee</th>
</tr>
</thead>
<tbody>
<tr>
<td>12oz 12pk Dr. Pepp Dr. Dr. Pepp</td>
<td>12oz 12pk Dr. Pepp</td>
<td>12oz 12pk - Dr. Pepp 2011 - ABC Mart W</td>
<td>1/26/2011</td>
<td>New</td>
<td>16,291</td>
<td>2</td>
<td>200%</td>
<td>$2,000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12oz 12pk A&amp;W Aut</td>
<td>12oz 12pk A&amp;W Aut</td>
<td>12oz 12pk - A&amp;W (S) 2011 - ABC Mart W</td>
<td>10/15/2011</td>
<td>New</td>
<td>32,555</td>
<td>3</td>
<td>150%</td>
<td>$1,000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12oz 12pk 7 Up Sum</td>
<td>12oz 12pk 7 Up Sum</td>
<td>12oz 12pk - 7 Up (S) 2011 - ABC Mart W</td>
<td>7/20/2011</td>
<td>New</td>
<td>26,321</td>
<td>4</td>
<td>75%</td>
<td>$3,000</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12oz 12pk All-In Wr</td>
<td>12oz 12pk All-In Wr</td>
<td>12oz 12pk - All-In Wr (S) 2011 - ABC Mart W</td>
<td>12/7/2011</td>
<td>New</td>
<td>54,385</td>
<td>5</td>
<td>25%</td>
<td>$0</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ABC Mart US-Wide</td>
<td>ABC Mart US-Wide</td>
<td>ABC Mart US-Wide 2011 - ABC Mart W</td>
<td>10/9/2011</td>
<td>New</td>
<td>0</td>
<td>0</td>
<td>0%</td>
<td>$0</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

#### Month Calendar

- **Promotion:** 12oz 12pk 7 Up Summer Bash
- **Status:** New
- **Type:** Discretionary
- **Start Date:** 6/22/2011
- **End Date:** 7/20/2011

---

**Note:** The above data is for demonstration purposes only and does not reflect real data or sales figures.
Data Entry – Lock Columns
Data Entry – Expand and Collapse Applets
Data Entry – Personalization
Data Entry – Too Many Mouse Clicks

Problem:
Too many mouse clicks to enter data

Solutions:
1. Train users on how to use the keyboard with pick lists.
2. Train users on how to use the keyboard with pick applets.
3. Train users on how to use keyboard shortcuts.
4. Train users how to use drag-and-drop functionality for attachments.
5. Reconfigure tab order in form applets.
6. Reconfigure column order and column width in list applets.
7. Reconfigure pick lists with a short listed set of values based on user context.
8. Reconfigure multivalue group pick applets as shuttle applets instead.
9. Reconfigure single-value pick applets as pick lists, check boxes, and radio buttons.
Data Entry – Pick Lists
Data Entry – Pick Applets
## Data Entry – Keyboard Shortcuts

### Table 19. Data Management Keyboard Shortcuts

<table>
<thead>
<tr>
<th>Action</th>
<th>Basic Mode</th>
<th>Extended Mode</th>
<th>Context</th>
</tr>
</thead>
<tbody>
<tr>
<td>New record</td>
<td>CTRL+ALT+N</td>
<td>CTRL+N</td>
<td>List, form</td>
</tr>
<tr>
<td>New record using Quick Fill template</td>
<td>CTRL+K</td>
<td></td>
<td>Form</td>
</tr>
<tr>
<td>New record using last used Quick Fill template</td>
<td>CTRL+J</td>
<td></td>
<td>Form</td>
</tr>
<tr>
<td>Apply Quick Fill template to record</td>
<td>CTRL+Q</td>
<td></td>
<td>Form</td>
</tr>
<tr>
<td>Copy record</td>
<td>CTRL+ALT+C</td>
<td>CTRL+B</td>
<td>Record</td>
</tr>
<tr>
<td>Save record</td>
<td>CTRL+SHIFT+S</td>
<td>CTRL+S</td>
<td>List, form</td>
</tr>
<tr>
<td>Delete record</td>
<td>CTRL+ALT+D</td>
<td>CTRL+D</td>
<td>Record</td>
</tr>
<tr>
<td>Undo record</td>
<td>CTRL+ALT+U -or- ESC</td>
<td>CTRL+U -or- ESC</td>
<td>Record</td>
</tr>
<tr>
<td>Select all</td>
<td>CTRL+ALT+A</td>
<td>CTRL+A</td>
<td>List</td>
</tr>
<tr>
<td>Invoke selection dialog box</td>
<td>CTRL+ALT+P</td>
<td>F2 or DOWN ARROW</td>
<td>Field</td>
</tr>
<tr>
<td>Open the calendar control</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Open the calculator control</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Open a drop-down list</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Table 20. Record Navigation Keyboard Shortcuts

<table>
<thead>
<tr>
<th>Action</th>
<th>Basic Mode</th>
<th>Extended Mode</th>
<th>Context</th>
</tr>
</thead>
<tbody>
<tr>
<td>Drill down into record</td>
<td>CTRL+SHIFT+SPACE</td>
<td></td>
<td>List</td>
</tr>
<tr>
<td>(Cursor focus must be on the hyperlinked field.)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Go to previous record</td>
<td>CTRL+SHIFT+. (comma)</td>
<td>CTRL+UP ARROW</td>
<td>List, form</td>
</tr>
<tr>
<td>Go to next record</td>
<td>CTRL+SHIFT+. (period)</td>
<td>CTRL+DOWN ARROW</td>
<td>List, form</td>
</tr>
<tr>
<td>Go to previous record set</td>
<td>CTRL+ALT+. (comma)</td>
<td>ALT+UP ARROW</td>
<td>List</td>
</tr>
<tr>
<td>Go to next record set</td>
<td>CTRL+ALT+. (period)</td>
<td>ALT+DOWN ARROW</td>
<td>List</td>
</tr>
<tr>
<td>Go to first record</td>
<td>CTRL+ALT+F</td>
<td>ALT+F</td>
<td>List, form</td>
</tr>
<tr>
<td>Go to last record</td>
<td>CTRL+ALT+L</td>
<td>ALT+L</td>
<td>List, form</td>
</tr>
</tbody>
</table>
Data Entry – Drag and Drop Attachments
# Data Entry – Tab Order

![Data Entry Form](Image)

### Payee Quota
- Last Name:
- First Name:
- Territory:
- Sales Hierarchy:
- Description:
- Quota:
- Measure:
- Frequency:
- Cumulative:
- Quota Period:
- Start:
- End:
- Seasonality Skew:

### Target
- Initial:
- Factored:
- Rolled Up:

### Amount

### Quantity

### Status
- Status:
- Changed:
- Version:
- Roll Down:

### By
- Accepted:
- Approved:
- Revised:

### Date
Data Entry – Column Order and Width
Data Entry – Shortlist Lists of Values
Data Entry – Shuttle Applets
Data Entry – Pick Lists, Check Boxes, and Radio Buttons
Data Entry – Business Rules

Problem:
Too many business rules locking the system down (shouldn’t versus can’t)

Solutions:
1. Train managers to delegate administrative work to assistants and power users leveraging the Change Position feature.
2. Reconfigure security rules so that more people have the ability and mandate to view and update data.
3. Reconfigure using data validation to enforce field-level business rules.
4. Configure an audit trail to track updates rather than locking down the system.
5. Configure OBIEE exception reports to track and manage bad data.
Data Entry – Change Position
Data Entry – Security Rules

ABC Mart US East (SVP)

<table>
<thead>
<tr>
<th>Account Name</th>
<th>Site</th>
<th>Account Team</th>
<th>Main Phone</th>
<th>Main Fax</th>
<th>URL</th>
</tr>
</thead>
<tbody>
<tr>
<td>ABC Mart US East (SVP)</td>
<td>Pequannock</td>
<td>CTRIPP</td>
<td>(908) 325-6701</td>
<td></td>
<td><a href="http://www.abcMart.com">www.abcMart.com</a></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Address</th>
<th>State</th>
<th>Country</th>
<th>Zip Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>901 State Hwy 23</td>
<td>NJ</td>
<td>USA</td>
<td>07440</td>
</tr>
</tbody>
</table>

Contacts

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Mr/Ms</th>
<th>Job Title</th>
<th>Work Phone #</th>
<th>Work Fax #</th>
<th>Email</th>
</tr>
</thead>
<tbody>
<tr>
<td>David</td>
<td>Ard</td>
<td>Mr.</td>
<td></td>
<td>(908) 554-9439</td>
<td></td>
<td><a href="mailto:dard@abc.com">dard@abc.com</a></td>
</tr>
<tr>
<td>Lisa</td>
<td>Bamont</td>
<td>Mrs.</td>
<td></td>
<td>(908) 554-2282</td>
<td></td>
<td><a href="mailto:lbamont@abc.com">lbamont@abc.com</a></td>
</tr>
<tr>
<td>Sandy</td>
<td>Black</td>
<td>Ms.</td>
<td></td>
<td>(908) 554-8843</td>
<td></td>
<td><a href="mailto:sblack@abc.com">sblack@abc.com</a></td>
</tr>
<tr>
<td>Bill</td>
<td>Dowdall</td>
<td>Mr.</td>
<td></td>
<td>(908) 554-6999</td>
<td></td>
<td><a href="mailto:bdowdall@abc.com">bdowdall@abc.com</a></td>
</tr>
<tr>
<td>Gina</td>
<td>Lyng</td>
<td>Mrs.</td>
<td></td>
<td>(908) 554-6868</td>
<td></td>
<td><a href="mailto:glyn@abc.com">glyn@abc.com</a></td>
</tr>
</tbody>
</table>
### Data Entry – Data Validation

![Validation Rule Set](image)

#### Validation Rule Set Details

<table>
<thead>
<tr>
<th>Sequence #</th>
<th>Name</th>
<th>Expression</th>
<th>Business Component</th>
<th>Apply To</th>
<th>Start Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Price list is Null.</td>
<td><code>[Price List] IS NOT NULL</code></td>
<td>Service Agreement</td>
<td>Current Record</td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Account is Null.</td>
<td><code>[Account] IS NOT NULL</code></td>
<td>Service Agreement</td>
<td>Current Record</td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Agreement Start Date or End Date is Null.</td>
<td><code>(Agreement Start Date) IS NOT NULL AND ((Agreement End Date) IS NOT NULL) </code></td>
<td>Service Agreement</td>
<td>Current Record</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Agreement End Date is before Agreement Start Date.</td>
<td><code>[Agreement End Date] &gt; [Agreement Start Date]</code></td>
<td>Service Agreement</td>
<td>Current Record</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Agreement Start Date is before Agreement Item End Date.</td>
<td><code>[Agreement Start Date] &lt; [Agreement Start Date]</code></td>
<td>Service Agreement</td>
<td>Current Record</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Agreement End Date is after Agreement Item Start Date.</td>
<td><code>[Agreement End Date] &gt; [Agreement Item End Date]</code></td>
<td>Service Agreement</td>
<td>Current Record</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Initial Quantity is less than Current Quantity.</td>
<td><code>[Initial Quota] &lt; [Current Quota]</code></td>
<td>Agreement Entitlement</td>
<td>All Records</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Entitlement Priority is less than zero.</td>
<td><code>[Entitlement Priority] &lt; 0</code></td>
<td>Agreement Entitlement</td>
<td>All Records</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Percent must be less than 100%.</td>
<td><code>If([(Unit) = Lookup(value(SERVICE_METRIC_UNIT, 'Percent'), [Value] &lt;= 100, 'Y')]</code></td>
<td>Service Agreement Metric</td>
<td>All Records</td>
<td></td>
</tr>
</tbody>
</table>

**Actions**

- **Name:** Price list is Null.
- **Sequence #:** 1
- **Business Component:** Service Agreement
- **Expression:** `[Price List] IS NOT NULL
- **Return Code:** 101
- **Message:** Price list is Null.
Data Entry – Audit Trail
Data Entry – Exception Reports

Lift Analysis by PPG

YTD by PPG (compared with Year Ago Figures)

<table>
<thead>
<tr>
<th>Year</th>
<th>PPG</th>
<th>Total Sales</th>
<th>Total Sales YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>Favourites 600g</td>
<td>$2,453,000</td>
<td>$3,453,000</td>
</tr>
<tr>
<td></td>
<td>Milled 250g Blocks</td>
<td>$103,210,000</td>
<td>$114,210,000</td>
</tr>
<tr>
<td></td>
<td>Milled 250g Old Gold</td>
<td>$25,210,000</td>
<td>$26,210,000</td>
</tr>
<tr>
<td></td>
<td>Parent Family Bags</td>
<td>$10,210,000</td>
<td>$11,210,000</td>
</tr>
<tr>
<td></td>
<td>Share Packs</td>
<td>$10,210,000</td>
<td>$11,210,000</td>
</tr>
<tr>
<td></td>
<td>2000 Total</td>
<td>$138,210,000</td>
<td>$150,210,000</td>
</tr>
</tbody>
</table>

Customer is equal to Woolworths

YTD by Month (compared with Year Ago Figures)

<table>
<thead>
<tr>
<th>Year</th>
<th>PPG</th>
<th>Month</th>
<th>Total Sales</th>
<th>Total Sales YTD</th>
</tr>
</thead>
<tbody>
<tr>
<td>2000</td>
<td>Favourites 600g</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>1</td>
<td>$154,000</td>
<td>$180,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2</td>
<td>$175,000</td>
<td>$190,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td>3</td>
<td>$195,000</td>
<td>$210,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td>4</td>
<td>$215,000</td>
<td>$230,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td>5</td>
<td>$235,000</td>
<td>$250,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td>6</td>
<td>$255,000</td>
<td>$270,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td>7</td>
<td>$275,000</td>
<td>$290,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td>8</td>
<td>$295,000</td>
<td>$310,000</td>
</tr>
<tr>
<td></td>
<td></td>
<td>2000 Total</td>
<td>$4,850,000</td>
<td>$5,150,000</td>
</tr>
</tbody>
</table>

Customer is equal to Woolworths
Problem:
Too much data to enter

Solutions:
1. Train users on User Profile Preferences, Quick Fill Templates.
2. Reconfigure fields to be defaulted based on parent records or fields already entered in the current record, such as the record name field.
3. Raise the master data (accounts, products, LOVs) tracking level so that a higher level of data, and thus less data, is referenced.
4. Restructure master data hierarchies from being ERP-centric to sales, service, and marketing centric so that less time is spent navigating hierarchies to find data.
Data Entry – Quick Fill Templates
Data Entry – Defaulting Values

![Plan List with Plan Details]

**Plan List**

- **Status**: New
- **Name**: 2011 - ABC Mart West CSD Plan
- **Account**: ABC Mart US West (SVP)
- **Category**: CSD (SVP)
- **Period**: 2011
- **Team**: CTRIPP

**Preferred Payment Method Defaults**

- Fixed Slot Fee Pay Method: Bill Back
- Variable Spend Pay Method: Deduction
- Other Fixed Spend Pay Method: Check
# Data Entry – Master Data Level

<table>
<thead>
<tr>
<th>Category Name</th>
<th>Display Name</th>
<th>Effective Start Date</th>
<th>Effective End Date</th>
<th>Sequence</th>
<th>Usage</th>
<th>Private</th>
<th>Count</th>
</tr>
</thead>
<tbody>
<tr>
<td>DPSG (SVP)</td>
<td>DPSG (SVP)</td>
<td>4/23/2002 11:17:39</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>11</td>
</tr>
<tr>
<td>CSD (SVP)</td>
<td>CSD (SVP)</td>
<td>5/8/2000 10:52:15</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>15</td>
</tr>
<tr>
<td>CSD 12oz - 12pk (SVP)</td>
<td>CSD 12oz - 12pk (SVP)</td>
<td>5/8/2000 10:52:48</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>11</td>
</tr>
<tr>
<td>12oz 12pk - Dr. Pepper (SVP)</td>
<td>12oz 12pk - Dr. Pepper (SVP)</td>
<td>4/23/2002 11:20:44</td>
<td></td>
<td></td>
<td>✓</td>
<td>✓</td>
<td>7</td>
</tr>
<tr>
<td>CSD 2L (SVP)</td>
<td>CSD 2L (SVP)</td>
<td>8/19/2011 12:28:30</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>4</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Product</th>
<th>Thumbnail Image File Name</th>
<th>Effective Start Date</th>
<th>Effective End Date</th>
<th>Product Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>12oz 12pk - Dr. Pepper - Cherry (SVP)</td>
<td></td>
<td>1/1/1993</td>
<td>12/31/2015</td>
<td>000009</td>
<td>12 oz - 12 pk - Dr. Pepper - Cherry</td>
</tr>
<tr>
<td>12oz 12pk - Dr. Pepper - Diet (SVP)</td>
<td></td>
<td>1/1/1998</td>
<td>12/31/2015</td>
<td>000005</td>
<td>12 oz - 12 pk - Dr. Pepper - Diet</td>
</tr>
<tr>
<td>12oz 12pk - Dr. Pepper - Vanilla (SVP)</td>
<td></td>
<td>1/1/1993</td>
<td>12/31/2015</td>
<td>000013</td>
<td>12 oz - 12 pk Dr. Pepper - Vanilla</td>
</tr>
</tbody>
</table>
Data Entry – Master Data Hierarchies

### Promoted Categories SKU's

<table>
<thead>
<tr>
<th>Status</th>
<th>Name</th>
<th>Category</th>
<th>Start Week</th>
<th>Duration</th>
<th>TPR %</th>
<th>Catalog Tactics</th>
<th>Display Tactic</th>
<th>Fixed Fee</th>
<th>Lifelift</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>New 7Up Promotion</td>
<td>CSD 12oz - 12pk (SVP)</td>
<td>1</td>
<td>2</td>
<td>4</td>
<td>10%</td>
<td></td>
<td>$0.00</td>
<td>10</td>
</tr>
<tr>
<td>New</td>
<td>12oz 12pk Dr. Pepper Rev</td>
<td>CSD 12oz - 12pk (SVP)</td>
<td>5</td>
<td>2</td>
<td>8</td>
<td>10% Front Page Shelf</td>
<td>$0.00</td>
<td>5</td>
<td></td>
</tr>
<tr>
<td>New</td>
<td>Everything in Week 1</td>
<td>CSD 12oz - 12pk (SVP)</td>
<td>1</td>
<td>1</td>
<td>1</td>
<td></td>
<td></td>
<td>$0.00</td>
<td></td>
</tr>
</tbody>
</table>

### Promoted Categories

<table>
<thead>
<tr>
<th>Category</th>
<th>TPR%</th>
<th>Catalog Tactics</th>
<th>Display Tactic</th>
<th>Fixed Fee</th>
<th>Bill Back Rate</th>
<th>Off Invoice Rate</th>
<th>Tot Spend</th>
<th>Base Vol</th>
<th>Incr Vol</th>
<th>Total Vol</th>
<th>Fixed Fee</th>
<th>Bill Back Spend Of</th>
</tr>
</thead>
<tbody>
<tr>
<td>12oz 12pk - Dr. Pepper (SVP)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1,108</td>
<td>0</td>
<td>1,108</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>12oz 12pk - 7UP (SVP)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>1,108</td>
<td>0</td>
<td>1,108</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>12oz 12pk - A&amp;W (SVP)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>$0.00</td>
<td>0</td>
<td>$0.00</td>
<td>$0.00</td>
<td></td>
</tr>
</tbody>
</table>

### Promoted Products

<table>
<thead>
<tr>
<th>Product Description</th>
<th>Base Vol</th>
<th>Incr Vol</th>
<th>Total Vol</th>
<th>Fixed Fee</th>
<th>Bill Back Rate</th>
<th>Bill Back Spend Of</th>
</tr>
</thead>
<tbody>
<tr>
<td>12oz 12pk - Dr. Pepper - Cherry (SVP)</td>
<td>1,108</td>
<td>0</td>
<td>1,108</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>12oz 12pk - Dr. Pepper - Diet (SVP)</td>
<td>1,108</td>
<td>0</td>
<td>1,108</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td>12oz 12pk - Dr. Pepper - Vanilla (SVP)</td>
<td>1,083</td>
<td>0</td>
<td>1,083</td>
<td>$0.00</td>
<td>$0.00</td>
<td>$0.00</td>
</tr>
<tr>
<td></td>
<td>3,299</td>
<td>0</td>
<td>3,299</td>
<td>$0.00</td>
<td>$0.00</td>
<td></td>
</tr>
</tbody>
</table>
User Interface
User Interface – Fresh Look

Problem:
Siebel UI looks old and outdated

Solution:
1. Embed Google Maps or Web Excel.
2. Add or enlarge icons.
3. Change font types, color, and sizes.
User Interface – Map Integration
User Interface – Icons

Welcome to Siebel Pharma Sean Phillips!
Today is Friday, May 09, 2008.

Your Team Territory Rating is 36/40. Please continue to work with your team to achieve maximum exposure against your call plan.
Your goal is 85%. **Well done!**
  * You are currently working in **Daily** mode. Click here to work in **Admin** mode.

My KPIs - Quarter to Date

<table>
<thead>
<tr>
<th>Call Days to Qtr Close</th>
<th>Call Execution to Plan</th>
<th>Unsubmitted Calls</th>
<th>Current Sample Inventory Level</th>
<th>Team Performance</th>
</tr>
</thead>
<tbody>
<tr>
<td>28</td>
<td>44%</td>
<td>9</td>
<td>Acceptable (68%)</td>
<td><strong>⭐⭐⭐⭐⭐</strong></td>
</tr>
</tbody>
</table>

May 05 - May 11

<table>
<thead>
<tr>
<th>Monday, May 06</th>
<th>12:00 AM</th>
<th>12:00 AM</th>
<th>Taking the &quot;Trends in Cardiology&quot; session</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>9:30 AM</td>
<td>10:00 AM</td>
<td>Svaiten Zuberi</td>
</tr>
<tr>
<td></td>
<td>11:00 AM</td>
<td>11:30 AM</td>
<td>Mont Anani</td>
</tr>
<tr>
<td>Tuesday, May 06</td>
<td>9:00 AM</td>
<td>9:30 AM</td>
<td>Rita Herrera</td>
</tr>
<tr>
<td></td>
<td>12:00 PM</td>
<td>1:30 PM</td>
<td>Lunch &amp; Learn, Diabetes Treatment Pathways</td>
</tr>
<tr>
<td></td>
<td>2:30 PM</td>
<td>3:00 PM</td>
<td>Lisa Dachowitz</td>
</tr>
<tr>
<td>Wednesday, May 07</td>
<td>9:30 AM</td>
<td>10:00 AM</td>
<td>Ponnella Clinic</td>
</tr>
<tr>
<td></td>
<td>1:30 PM</td>
<td>2:00 PM</td>
<td>Svaiten Zuberi</td>
</tr>
<tr>
<td></td>
<td>3:00 PM</td>
<td>3:30 PM</td>
<td>Vidal Moorefield</td>
</tr>
<tr>
<td>Thursday, May 08</td>
<td>10:00 AM</td>
<td>10:30 AM</td>
<td>Avesta Village Hospital</td>
</tr>
<tr>
<td></td>
<td>3:30 PM</td>
<td>4:00 PM</td>
<td>Michael De la Cruz</td>
</tr>
<tr>
<td></td>
<td>4:30 PM</td>
<td>5:00 PM</td>
<td>Rajat Gupta</td>
</tr>
</tbody>
</table>

Flash Alert

Key Messaging for Today
**Territory Update - Sean Phillips**

You have 3 new Professionals in your territory. Please map them to their appropriate routes and update your call plan.

**Tip of the Day:**

Update Your Time Off Territory Today.

* Click on the Admin Link link.
* Drill in on ‘Time Off Territory’
* Create a new record

My Objectives
User Interface – Fonts

Welcome Back Mike Carlson!
Today is Thursday, March 29, 2007.

**Recommended Items**

**PCS 4700C**
Enhanced Performance, Small Design. Save space without sacrificing power. Over 60% smaller! Click Here to Register for a Free 4700C!

**PCS 6700 Wi-Fi Network Printer**

<table>
<thead>
<tr>
<th>Last Item Added:</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Line Items:</strong></td>
</tr>
<tr>
<td>View Details</td>
</tr>
</tbody>
</table>

**Quick Add**
Complete one of the two fields below and click Add Item

- **Item Name:**
- **Item Code:**

Add Item
User Interface – Color Coding

<table>
<thead>
<tr>
<th>SR #</th>
<th>Summary</th>
<th>Account</th>
<th>Customer Refere</th>
<th>Last Name</th>
<th>Status</th>
<th>Owner</th>
</tr>
</thead>
<tbody>
<tr>
<td>1-40ZL</td>
<td></td>
<td>Atherton Group</td>
<td>Agee</td>
<td>Closed</td>
<td></td>
<td>SADMIN</td>
</tr>
<tr>
<td>1-365121</td>
<td></td>
<td>Agee</td>
<td></td>
<td>Closed</td>
<td></td>
<td>SADMIN</td>
</tr>
<tr>
<td>1-643937</td>
<td>Change of address</td>
<td>Atherton Group</td>
<td>Agee</td>
<td>Open</td>
<td></td>
<td>SADMIN</td>
</tr>
<tr>
<td>1-657125</td>
<td></td>
<td>1-643937</td>
<td>Abby</td>
<td>Open</td>
<td></td>
<td>SADMIN</td>
</tr>
<tr>
<td>1-660972</td>
<td></td>
<td>Abby</td>
<td></td>
<td>Open</td>
<td></td>
<td>SADMIN</td>
</tr>
<tr>
<td>1-680982</td>
<td></td>
<td>Abby</td>
<td></td>
<td>Open</td>
<td></td>
<td>SADMIN</td>
</tr>
<tr>
<td>1-698490</td>
<td></td>
<td>GH-105</td>
<td>Judd</td>
<td>Closed</td>
<td></td>
<td>SADMIN</td>
</tr>
<tr>
<td>1-600043</td>
<td></td>
<td></td>
<td></td>
<td>Open</td>
<td></td>
<td>SADMIN</td>
</tr>
<tr>
<td>1-914801</td>
<td></td>
<td>Atherton Group</td>
<td>Agee</td>
<td>Open</td>
<td></td>
<td>SADMIN</td>
</tr>
<tr>
<td>1-48961</td>
<td></td>
<td>Aaron-Jones Dry Cl</td>
<td>Aarons</td>
<td>Closed</td>
<td></td>
<td>SADMIN</td>
</tr>
</tbody>
</table>

**SR Information**

- **SR #**: 1-643937
- **Last Name**: Agee
- **First Name**: Paul
- **Account**: Atherton Group

**Status and Ownership**

- **Status**: Open
- **Owner**: SADMIN

**Summary**

- **Opened**: 7/7/2000 9:19:39 AM
User Interface – Alternative UIs

Problem:
Users want a new or different UI

Solutions:
1. A handheld client for Microsoft Windows devices can now be extended with C++ scripting and COM integration.
2. Adobe and Google Gadgets enables users convenient access to data in Siebel.
3. CRM Desktop enables users to use Microsoft Outlook as their UI for Siebel.
4. Web services and REST API-enabled objects enable new UIs to be easily built using tools such as Microsoft Silverlight and Adobe Flex.
5. SonGo is Siebel’s new Adobe Flex-based mobile client specifically designed for tablets.
6. *iSales, Oracle’s new mobile platform, will leverage iPad/iPhone, Blackberry, and Android native app technology to access in disconnected mode.
7. *Open UI will leverage Jquery/Jscript technology to enable users access with any browser using a modern and fully flexible and extensible framework.

* Denotes not generally available as of October 27, 2011.
User Interface – Handheld
User Interface - Gadgets
User Interface – CRM Desktop (Outlook)
User Interface – REST API
User Interface – SonGo (Adobe Flex)
User Interface – iSales (iPad)
User Interface – Open UI Prototype

Left Navigation Menu
User Interface – Open UI Prototype

Top Navigation Menu
<table>
<thead>
<tr>
<th>Feature</th>
<th>Remote</th>
<th>Smart Phone</th>
<th>Tablet</th>
<th>MS Windows</th>
<th>Apple iPad/iPhone</th>
<th>Blackberry/Android</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>HH</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td></td>
<td>Now extensible with C++/COM integration</td>
</tr>
<tr>
<td>Open UI</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Currently Apple/iPad compatible New Jquery/Jscript UI framework coming soon</td>
</tr>
<tr>
<td>OBIEE</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Now 11g with geospatial mapping</td>
</tr>
<tr>
<td>Gadgets</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Adobe and Google mini UI</td>
</tr>
<tr>
<td>CRM Desktop</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td></td>
<td>New Outlook UI</td>
</tr>
<tr>
<td>Web Services and REST APIs</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Can leverage Adobe Flex or Microsoft Silverlight</td>
</tr>
<tr>
<td>SonGo</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td></td>
<td></td>
<td>Requires Adobe Flash</td>
</tr>
<tr>
<td>iSales</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>New disconnected mobile client coming soon</td>
</tr>
<tr>
<td>Oracle Fusion</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>Yes</td>
<td>New enterprise application platform coming soon</td>
</tr>
</tbody>
</table>
Oracle Business Intelligence
Business Intelligence

• **BI Publisher** for ad hoc pixel perfect reports that combine data from Siebel and external sources that do not require the involvement of IT

• **OBIEE real-time federated reports**, write-back capabilities, and geo-spatial reports

• **OBIEE embedded analytics** for what-if scenario planning and ad hoc reporting

• **OBIEE geospatial mapping** to capture and display geography specific data

• **Real-time decisions** to enable users to intelligently determine the best offer to present to customers in real-time

• **Segmentation Manager** to enable analysts to create balanced logic, as well as "interesting" segments that marketing managers can leverage in their marketing campaigns
Business Intelligence – Geospatial Mapping
Siebel Add-on Modules
Horizontal Modules

- **Correspondence** to automatically mail merge and email documents to multiple recipients
- **Presentations** to automatically generate and manage multisection presentations
- **Forecasting** for discrete opportunity or time series volume forecasting
- **Product Configurator** to dynamically guide users to appropriate product combinations
- **Price Configurator** to dynamically determine pricing
- **Contracts** for sales and service agreements, including tiered maintenance and repair offerings, usage-based offerings, rentals, and leases
- **Solutions** to intelligently direct users to the right solutions
- **eMail Response** for parsing incoming emails
- **SmartScript** to enable business users to create branching logic questionnaires
- **Assessments** to enable business users to create answer-constrained questionnaires
- **Marketing Campaigns** to plan, create, test, deploy, and analyze personalized and permission based multichannel campaigns
- **Marketing Resources Management** to manage marketing funds and activities
- **Loyalty Management** track and manage loyalty points
- **Partner Relationship Manager** to delegate user administration to partners’ administrators
- **Secured Enterprise Search** to intelligently search for structured and unstructured data
Industry Modules

• **Personal Content Delivery** to enables marketing managers to compile interactive multimedia presentations and field sales representatives to deliver them on touchpad devices
• **Territory Management** to automatically manage sales territories based on a set of flexible and configurable rules
• **Trade Promotion Management** for promotions, claims, and rebate management
• **Trade Funds Management** to manage trade, partner, customer, or other types of funds
• **Sales Volume Planning** for time series volume planning
• **eBilling** for electronic presentations of customer bills
• **Events Management** for managing a wide range of events such as seminars, product demonstrations, trade shows, conferences, webinars, and sporting events
• **Group Sales Management** to manage the planning and booking of group sales
• **Warranty Management** to handle warranty claims
Oracle Ecosystem
Oracle Ecosystem – Add-on Applications

• **ATG**, the leading eCommerce software for retailers, has a superior user experience for customers to enter orders, as well as sophisticated up-sell and cross-sell functionality.

• **Policy Automation** enables business rules to be developed and managed by the business rather than by IT, using a natural language business rules engine in a familiar tool such as Microsoft Word.

• **Data Quality Management** validates addresses and postal codes and intelligently checks for duplicates using phonetic matching.

• **UPK** enables self-paced end-user training, either in line during regular use, or off line with easy-to-create interactive training sessions.

• **Crystal Ball** enables users to run through multiple deal scenarios to determine the optimum deal to strive for, with consideration of possible parameter constraints.

• **Deal Management** enables users to determine the ideal deal to offer a customer based on the company’s deal history.

• **Demantra** Predictive Planning predicts sales volumes based on sales history, market trends, and causal factors.

• **Master Data Management and Dimension Relationship Management** enables companies to smoothly integrate their master data with multiple systems and manage multiple hierarchies that change frequently.

• **Real-time Scheduler** optimizes the scheduling of resources based on a myriad of possible parameters and conditions.

• **WebCenter Content** to manage content across the enterprise.

• **InQuira** for intelligent searching and displaying of unstructured data.

• **Oracle Fusion** for Oracle’s new open standards-based enterprise software platform.
User Productivity Kit (UPK)

Single Authoring – Multiple Deployments

Author Once

Interact
- See It – Recorded Demos
- Try It – Interactive Simulations
- Do It – Context-Sensitive Help

Publish
- Word - Requirement Docs and Test Scripts
- PDF - User Manuals and Job Aids
- PPT - Instructor Training
- HTML - Websites

Integrate
- Testing Tools
- Learning Management Systems
Context-Sensitive Help
Oracle Fusion
Questions?

To request
a copy of this presentation,
a recording of this webcast,
more information about material covered in this webinar,
or to have a complimentary usability workshop conducted for your implementation,
please contact your Oracle CRM sales representative or Matt.Wenzel@Oracle.com.