Siebel Training for Franchise Module 12/28/12

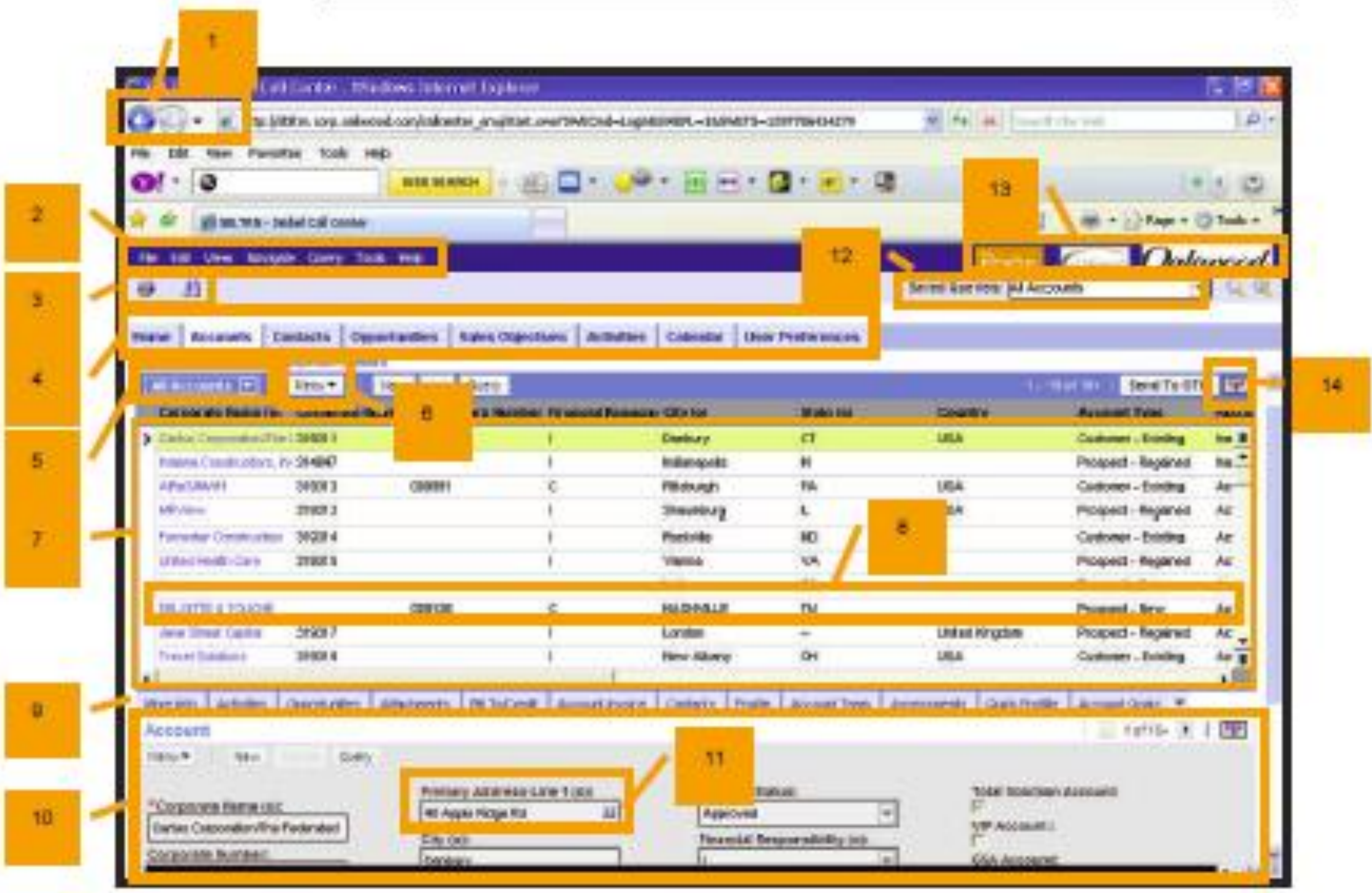
Background:

- Siebel is a leading Customer Relationship Management (CRM)
- Software owned by Oracle.
- Customer Relationship Management (CRM) is an integrated approach to identifying, acquiring, and retaining customers.
- The purpose of CRM is to enable organizations to manage and coordinate customer interactions across multiple channels, departments, lines of business, and geographies.

General Information:

- Use your existing EPIC login ID and password. This will be a shared login.
- Epic Tab – No change.
- You may customize your columns displayed on any list section of Siebel.
- Parts of the User Interface Screen.

Diagram of the Standard User Interface Screen (Franchise view varies slightly)



Item	Item Name	Purpose
1	Back icon	Takes users back a previous screen.
	Forward icon	Takes users forward to a screen if already reviewed and navigated away from.
	History dropdown Listing	Displays screens users have accessed since opening an internet browser.
2	Siebel Application-Level menu	Houses a series of commands used to customize and manage data within the Siebel system.
3	Site Map icon	Provides one click access to items without having to click on Screen and View tabs.
	Search icon	One type of functionality to locate Account, Contact, and Opportunity information in Siebel without interrupting your current screen.
4	Screen Tabs	Identifiers representing a different screen into which data is organized.
5	Visibility Filter	Allows users to define the expanse of information desired.
6	Menu	
7	List	The display of multiple records, presented in rows.
8	Record	A collection of multiple data fields.
9	View Tabs	Ways of accessing and displaying additional information for a selected record.
10	Form	A means, like a dashboard, allowing users to easily access detailed information about a single record.
11	Data field(s) [“Status” is one example]	Any field on the screen in which data can be entered or viewed and collectively makes up a record.
12	Saved Queries dropdown list	Stores all saved queries for future use. Queries within the drop-down list are screen-specific.
13	Web-Site Short Cut icons	Provides one click access to The Edge, eOakwood (aka. Property Profiles), and Oakwood.com.
14	Show- More/Less icon	Expands/collapses the List or Form so users may view either more or less information at a given time.

- Adding records

Throughout the Siebel application, new records can be added one of the following four ways, the:

  - New button
  - Menu button
  - Application-level menu
  - Ctrl + N key combination

Use whichever procedure works best or is available.

When adding a record, a new record template appears containing fields that need to be completed and those that contain read-only information.
Read-only fields are those in which data cannot be entered.

- Saving Records

Records can be saved via:

  - Menu button> Save Record
  - Edit > Save Record
  - Ctrl + S
  - Stepping-off

Users may only undo or delete a newly created record prior to saving it. To cancel a record before it has been saved, click the Menu button, and then click Undo or Delete Record.

- Searching for information, either
  - click the Search icon on the application toolbar,
  - from the Application-level menu, choose Edit > Search or
  - Press Ctrl + F

- Creating and Saving a Query

  Querying is a way to locate one or more records that meet your specified criteria.
  Example: Users could use a query to find how many opportunities were created, in a given year, that still have a status of Pending.

    1. Navigate to the Opportunities screen
    2. Click the query button located in the list or form
    3. Enter the query criteria in the following fields
       Status: Pending
       Created Date: >= 1/1/12 and <= 12/31/12
    4. Click Go or press Enter.
    5. The query is executed and the records appear in the list
    6. Click Query in the Application-level menu and select Save Query As.
    7. Type in the appropriate name in the available dialog box and click OK.

  Results: the saved query appears in the queries drop-down list.
  The criterion, not the actual query results, is saved.

- Display Record Count

  Users can obtain an accurate count of the number of records in a list without having to navigate to the last record in that list. Click Menu, Record Count (displays executed query results count)

- Export Records

  Users can export records. Click Menu, Export, select export criteria, click next, open or save.
- Adding Attachments

  Files created in another application can be attached to a record wherever the Attachments View tab is available within a screen. The Attachment feature is available in those screens that would logically benefit from the addition of supporting material. For example, in the following screens:
  - Accounts
  - Contacts
  - Opportunities
  - Activities
  - Requests for Housing
  - Supplier

  It is possible to create an attachment using either the
  - drag-and-drop feature or
  - Attachments' New File button.
  - Attachment's New URL button
- Identifying yours and other user's accounts

- Accounts Tab:
  - Creating a New Account
    - Before creating a new account in Siebel, query the database to see whether the account already exists. This helps reduce duplicates.

      Note: Utilize asterisks when querying to ensure the account doesn't exist.

      Example: *ExecBusiness*, Exec*, *Business.
    - Click the New button to create an account.
    - In the Corporate Name field, type in the name using appropriate spelling, punctuation, and capitalization.
    - The Account Type field will default to a read-only "Prospect – New" status for all new accounts.

      Additional options are as follows:
      - Prospect – Regained
      - Customer – Existing
    - To input the corporate address into the applicable fields:

      a) Click the Pick icon in the Primary Address line field.

      b) Click New in the Account Address list and then type the address in the corresponding fields.

      c) Click Save.

      Click OK to associate the address with the account.

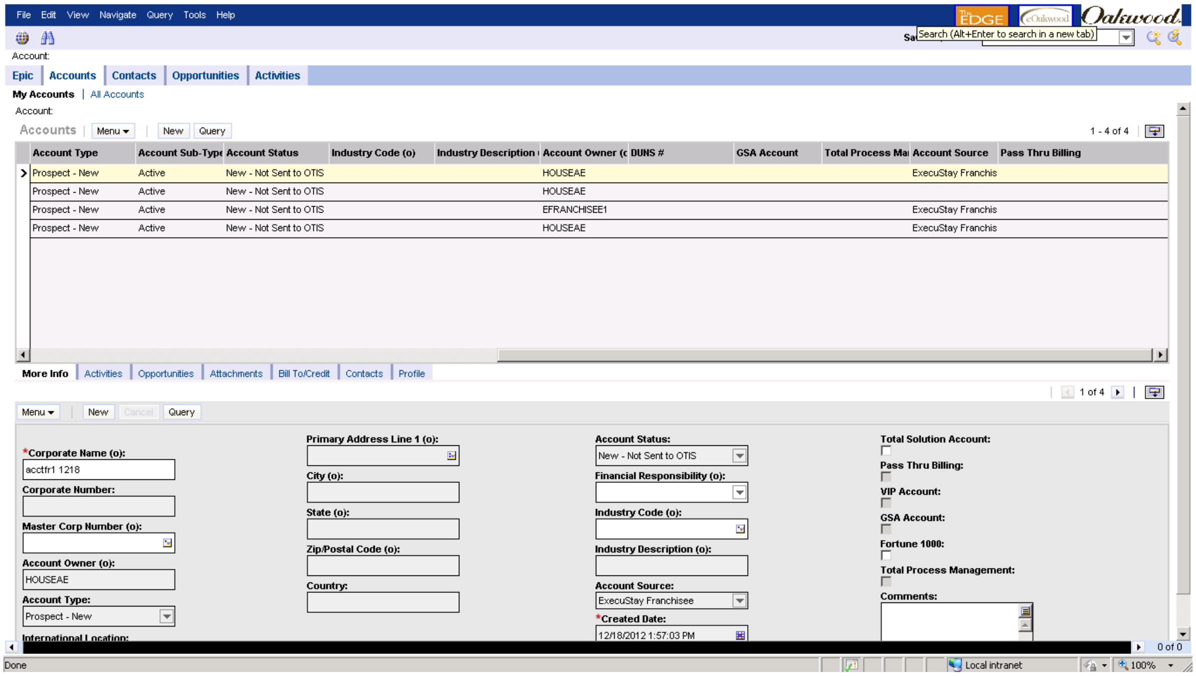
      Note: The Account Status field populates with one of the following status types:
      - New-Not Sent to OTIS – An account that has been created but not yet sent to OTIS for processing.
      - Submitted to OTIS – An account that has been created and sent to OTIS for processing.
      - Pending Approval – An account that has been sent to OTIS but the official pending process is not yet complete.

    - Approved – The CAR performed a credit analysis and approved the direct bill account.
    - Suspended – The CAR performed a credit analysis and either has not approved the account or the account has a bad payment history.
- In the Financial Responsibility field, select the appropriate choice from the drop-down menu:

    Example:
    C – Corporation will be direct-billed.
    I – Corporation will reimburse guest, guest will pay with corporate/individual credit card.
- Click the Pick icon in the Industry Code field.
- A read-only DUNS field will be used in the future to assist sales efforts.
- The Created Date field auto populates, time and date stamping the new record.
- If this is a PTB account, request that Oakwood populate the PTB checkbox.
- If applicable, check the VIP Account checkbox which is accessible to designated Associates.

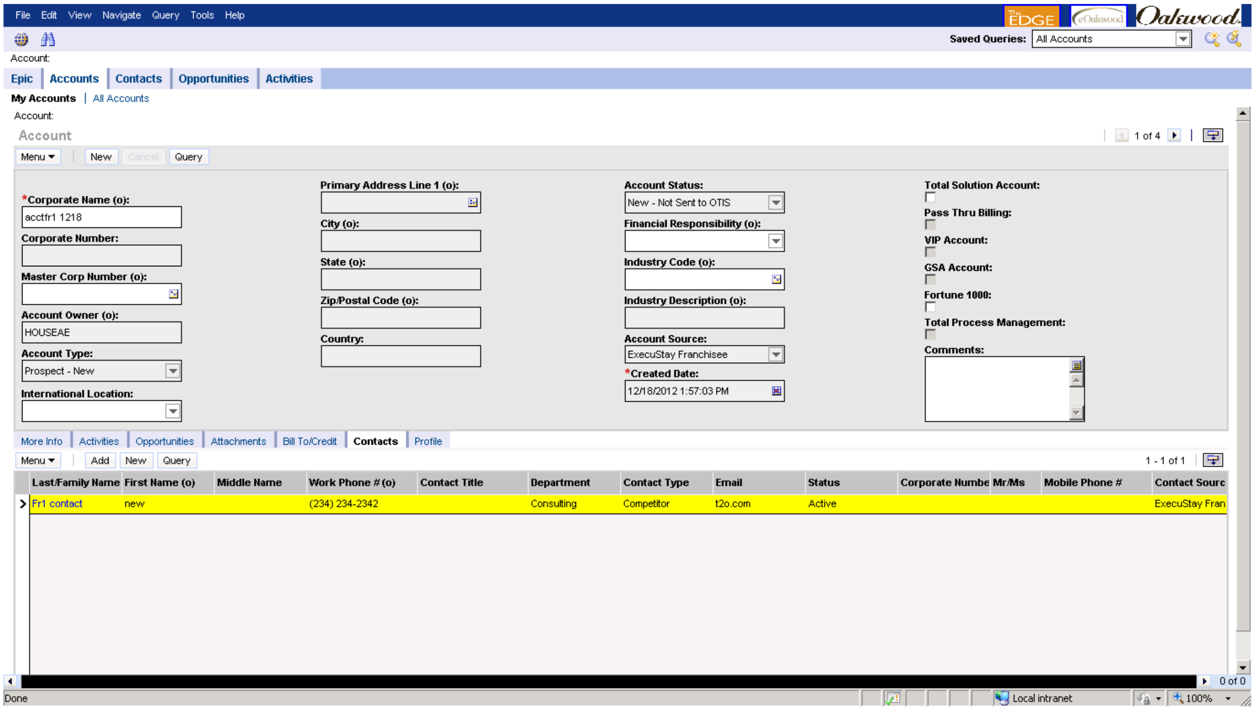
    For each opportunity associated with this account, the VIP status populates gold stars for easy identification.
- If applicable, check the GSA Account checkbox which is accessible to designated Associates.
- In the Comments box, type important account information, such as pet fee exceptions, ITV information, company background, and account status.
- Identifying your and other user's Accounts
    - Franchisees accounts are identified by the Account Source of "ExecuStay Franchisee".
    - Accounts shared between both ExecuStay and Oakwood will be identified by an Account Source of "ALL"
    - Choose "My Accounts" to see your own accounts
    - Choose "All Accounts" to see all of ExecuStay and Oakwood accounts.

The Account Screen>My Accounts/More Info View tab.



- Contacts Tab:
    - Adding contacts
        - Contacts can be input in these ways:
            - separately using the Contacts Screen
            - during the creation of an account.
        - For future purposes, the contact record can be located
            - with the account and
            - in the Contacts Screen.
        - Deleting a contact record in the Accounts Screen/Contacts View only removes the contact's association with that account. The original contact record is still available in the Contacts Screen.
        - Contacts may be designated as inactive by using the available drop-down menu to adjust their Status.

The Account Screen>Contacts View tab.

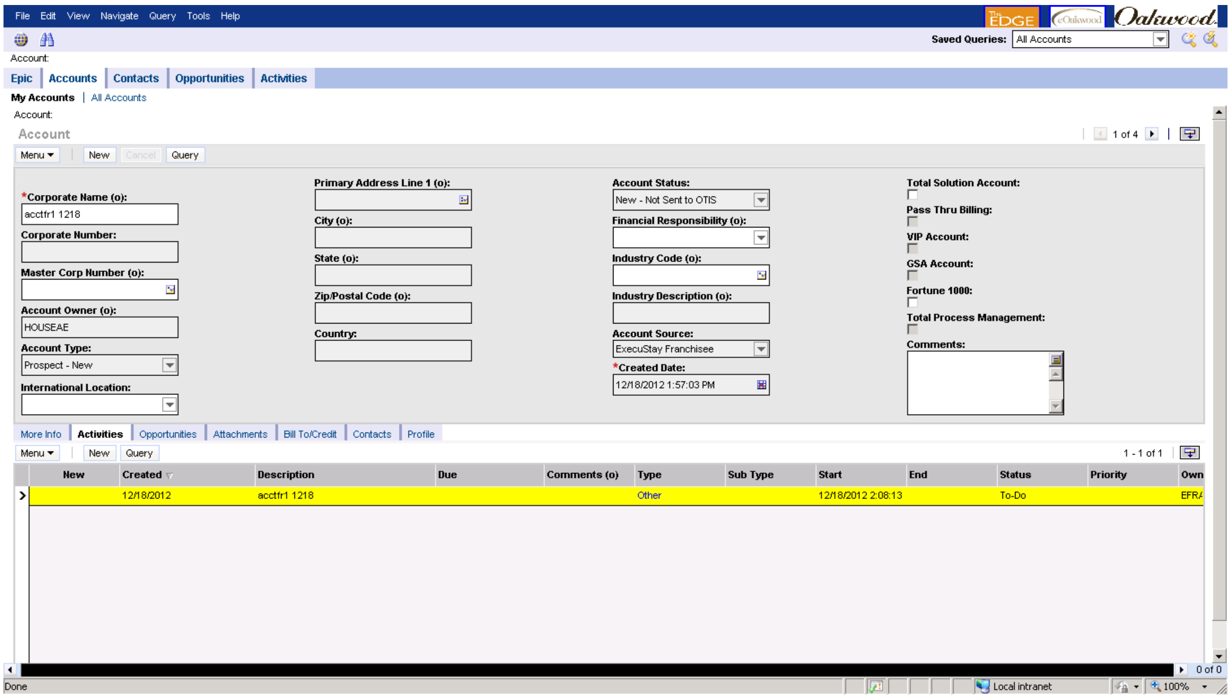


- Access the Account Screen>Contacts View.
- Query the contact's name by selecting *Add* to bring up a list of all contacts Oakwood has done business with and to ensure no duplicate contacts exist in Siebel.
  Note: It is possible that a contact who works for the company being created may have previously done business with Oakwood while affiliated with another company.
- Select the Query button, type in the search criterion, and then select Go.
- If viable results appear, highlight the appropriate one and select OK.
  Result: Information populates in certain fields.
- If the contact has indicated never having contacted Oakwood before or if valid results do not appear, select New.
- Input the contact's information in available fields:
- Press Control +S or "step off" to save.
- (optional) To access additional fields and selections and to ensure that mandatory fields for entry were not missed, click on the contact's hyperlinked last name.
  Note: The highlighted screen becomes the Contact screen rather than the Account screen.

- Identifying yours and other user's contacts
  - Franchisees contacts are identified by the Contact Source of "ExecuStay Franchisee".
  - Contacts shared between both ExecuStay and Oakwood will be identified by a Contact Source of "ALL"
  - Choose "My Contacts" to see all franchised contacts
  - Choose "All Accounts" to see all of ExecuStay and Oakwood contacts.

- Activities Tab
  - Adding Activities
    - Users can use the Activities List to enter and track all account-related activities.
    - Throughout the account relationship, users can associate an activity with a specific account to track which activities have been completed and which still need to be accomplished.

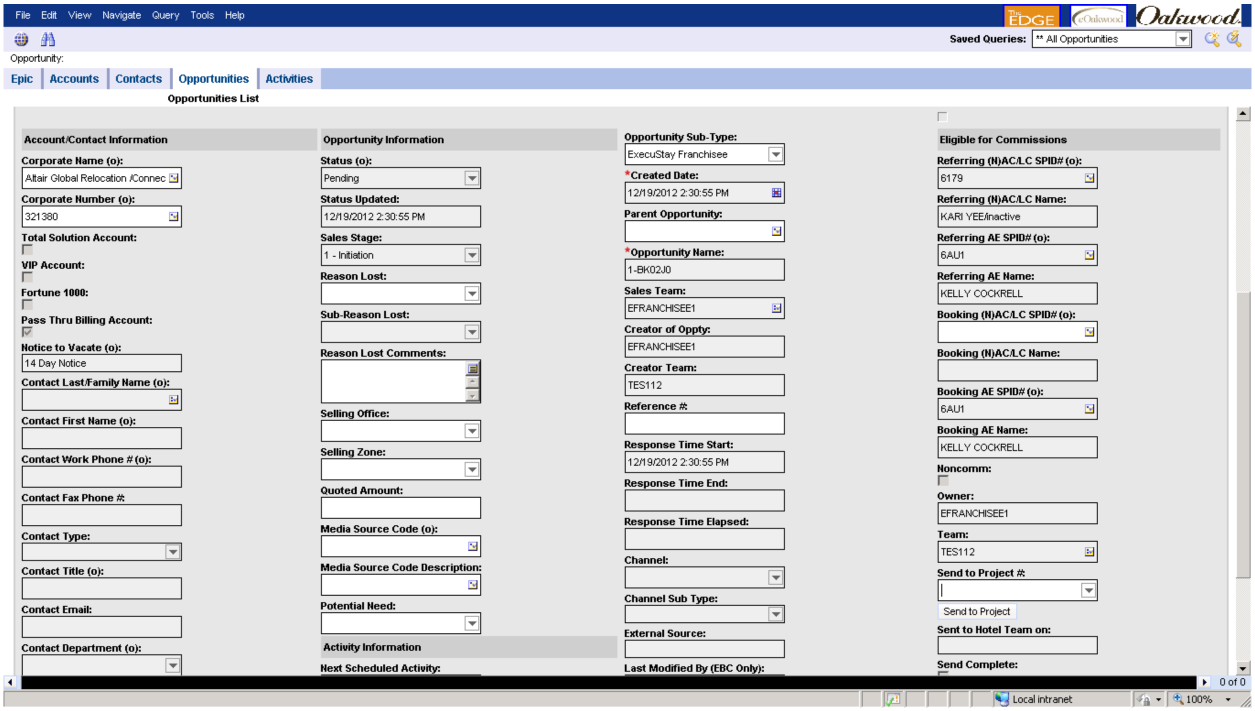
The Account Screen>Activities View tab.



- Access the Accounts Screen.
- Using the appropriate Visibility Filter and/or the Query button if necessary, locate the desired account.
- Click the Activities View. Click New.
- Access the Type field and select an appropriate option.
- Once the appropriate Type has been selected, click on its hyperlink.
- Complete remaining fields
- Type your name in the contact field (this is currently the only way to distinguish your activities from others within your franchise company)
- Press Ctrl + S or “step off” to save.

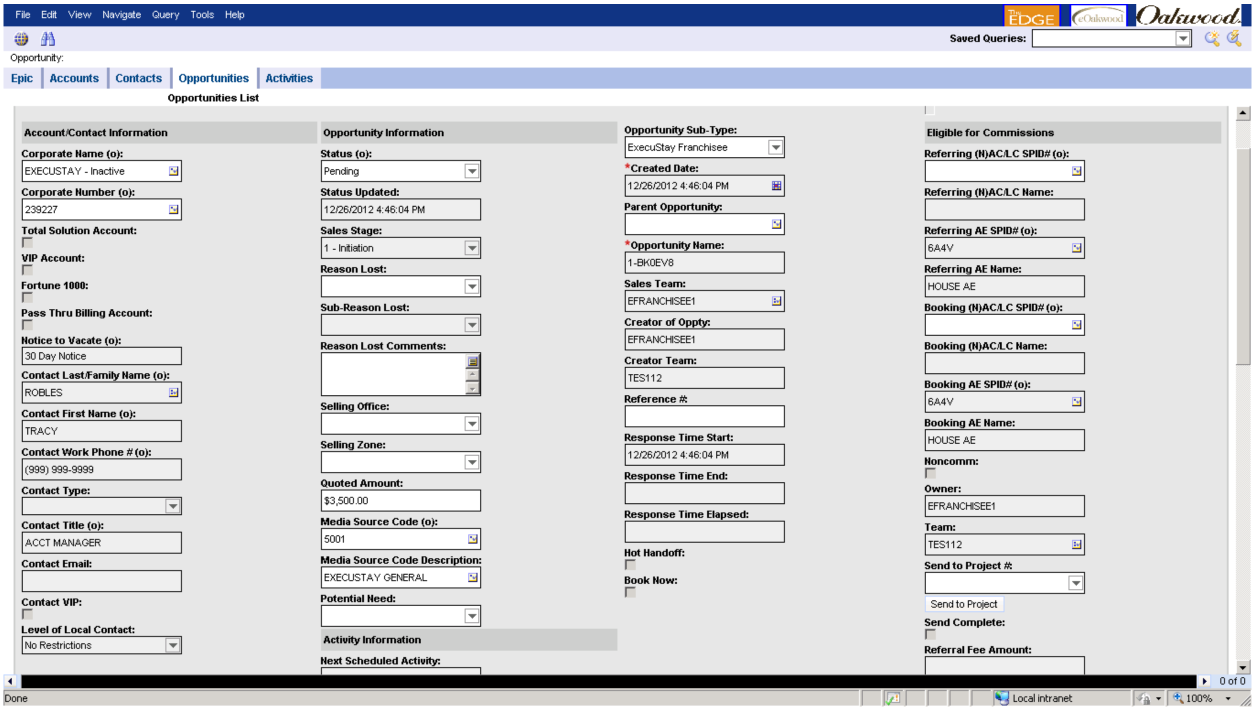
- Opportunities Tab (Opptys):
  - Creating and sending Opptys

The Opportunities Screen>More Info View.



- In the Opportunities Form, click New.
- In the Corporate Name field, click the Pick icon and then Enter the desired Company name.
- In the Contact Name field, click the Pick icon.
- In the Contacts List, click Query.
- In the Last Name field, input the desired information.
- Click Go.
- Click Add.
- Click OK.
- Input the Quoted Amount and the Media Source (Media Source Code = 7777 – ExecuStay Franchisee Generated).
- Press Ctrl + S or “step off” to save.

The Opportunities Screen>Guest Needs View.



- Navigate to the Opportunities Screen.
- Select the opportunity desired to add additional housing details.
- Click the Guest Needs View.
  Result: The Guest Needs Form appears with fields in two sections, Guest Information and Apartment Preference.
- Input the fields which represent the two sections of fields in the Guest Information form:
  - Guest Information and Apartment Preferences
    - The following fields are mandatory for quote creation:
      - Move-In Date
      - Length of Stay
      - Intent to Vacate Date
      - Budget
      - Location Desired (City, ST)
      - Region
      - Apartment Size/Type (1-5)
      - Quantity (1-5)
    - Guest address is required for consumer-related stays
    - If the guest does not want to provide an email address, type refused@oakwood.com
  - Press Ctrl + S or “step off” to save.
  - In the Opportunities List, select the desired opportunity
  - Select the destination market in the Send to Project# field
  - Click the Send to Project button
  - Result: the Send complete box displays a checkmark.

- Receiving Opptys
  - Navigate to the Home Screen
  - From the My Opportunities List, select the opportunity by clicking on the Opportunity Name hyperlink.
  - Result: The Opportunity Summary view appears with
     a snapshot of what has happened with the opportunity and
     key information from the More Info and Guest Needs Views.
  - Follow up with the guest/client as you would any lead.
  - You may add Activities or Attachments to the Oppty.
  - Upon completion, mark the Oppty as “rented”, or “lost” in the Status field.
    - If PTB, do not mark “rented”. Instead, leave in “Pending” status and send to the PTB team (see PTB Opptys below)
    - If Lost, complete the following fields:
      - Reason Lost
      - Sub Reason Lost
      - Reason Lost Comments
      - Selling Office
      - Selling Zone
    - Press Ctrl + S or “step off” to save

- PTB Opptys
  - Opptys for PTB accounts will work the same with the following exceptions:
    - Always attach the PTB sheet to the Oppty
    - The “PTB” checkbox will automatically populate
    - Whether the franchised market or Oakwood is managing the relationship with the guest, <u>you will no</u>t be able to mark a PTB Oppty “rented”. Instead, send the Oppty back to the PTB team at Oakwood by choosing “937-Pass-Thru-Billing” in the Send to Project# field.
    - You will still be able to view the opportunity after sending it back by clicking on Opportunities > All Opportunities View.