



Siebel Newsflash

Overview The Siebel Team consistently updates Siebel to allow you to work more efficiently and effectively every day.

Screens Affected This Newsflash describes enhancements related to Siebel Pricing, *epic* and other General changes.

Date/Time These enhancements were released Friday, May 31st 2013.



Newsflash Contents

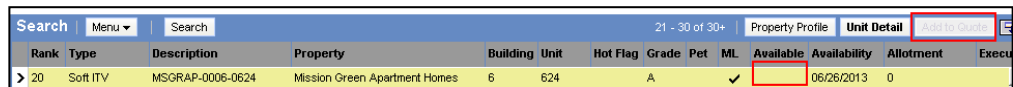
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Siebel Pricing Enhancements

Siebel Pricing Change # 1

Associate Restrictions for Adding 'Non-bookable' Apartments to a Siebel Quote

Siebel now limits which Associates are able to add apartments that are not associated to a bookable icon  to a Siebel quote. For Associates that do not have system access to this ability, the Add to Quote button will be grayed out when you highlight an apartment without the bookable icon .



Rank	Type	Description	Property	Building	Unit	Hot Flag	Grade	Pet	ML	Available	Availability	Allotment	Execu
> 20	Soft ITV	MSGRAP-0008-0624	Mission Green Apartment Homes	6	624		A		✓		06/26/2013	0	

Siebel Pricing Change # 2

OCH Hard Inventory Reservation Restricted When Quantity > 1

If Associates attempt to book a reservation for an OCH Hard Inventory (i.e. an actual unit) with Quantity >1, they'll receive the following error message:



The selected apartment is an OCH Hard Inventory apartment and the Quantity requested is 3. Please adjust the Quantity or select a non-OCH Hard Inventory apartment. (SBL-EXL-00151)

Siebel Pricing Change # 3

Cost Items Financial Responsibility Adjusted if Oppty Financial Responsibility Changes

If Associates change the financial responsibility of an oppty after creating a quote, Siebel adjusts the financial responsibility of automatically created Cost Items to be consistent with the new financial responsibility designated.

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Siebel Pricing Enhancements, Continued

Siebel Pricing Change #4

Location Desired 'Spacing' Glitch Fixed

Previously, Siebel Pricing would not be able to return Availability Search results if Associates entered an extra space in the Location Desired field. This glitch has been fixed.

The screenshot displays the Siebel Pricing 'Availability Search' interface. The top navigation bar includes tabs for 'More Info', 'Catalog', 'Apartment Search', 'Availability Search' (selected), 'OLR Availability', 'Line Items', 'Costs', 'Pricing', 'Shipping', 'Opty More Info', 'Opty Guest Needs', and 'Opty Attachments'. Below the navigation bar is a 'Menu' dropdown. The main section is divided into 'Stay Information' and 'Search Details'. 'Stay Information' includes fields for 'Move-In Date' (10/1/2013), 'Length of Stay' (22), and 'Intent to Vacate Date' (10/22/2013). 'Search Details' includes 'Apartment Type' (1F), 'Quantity' (1), 'Search Type' (Proximity), 'Location Desired(City,ST)' (Austin, TX), 'Zip/Postal Code', and 'Search Radius' (50). A 'Show Apts' button is located to the right of the 'Location Desired' field. Below the search details is a 'Search' button and a 'Menu' dropdown. The results section shows '1 - 1 of 1' results. A table displays the search results with columns: Rank, Type, Description, Property, Building, Unit, Hot Flag, Grade, Pet, ML, Available, Availability, Allotment, and Execut. The first result is a 'Priority Booking' for 'STRDAP - Settlers Ridge Apartments' with a building of 8888, unit 8888, grade B, and availability for 10/01/2013.

Rank	Type	Description	Property	Building	Unit	Hot Flag	Grade	Pet	ML	Available	Availability	Allotment	Execut
> 1	Priority Booking	STRDAP - Settlers Ridge Apartments	Settlers Ridge Apartments	8888	8888		B		✓	10/01/2013	999		

epic Enhancements

epic Change # 1

Available Date Column Added to RFH Response

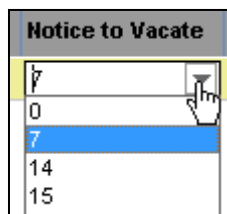
To allow *epic* Providers to specify when a property is 'available', a new Available Date column has been added to the RFH Response applet.

Menu	Query	Additional Response							
Property Name	Street Address	City	State	Zip/P	Country	Available Date	Property Type	Currency	Daily Rate
> TEST PROPERTY	123 Test Way	Austin	TX		USA	7/30/2013	Core	USD	\$88.00

epic Change # 2

7 Day Notice to Vacate Available in Drop-Down Menu

Many *epic* Providers offer 7 day notice to vacate; this value has been added to the drop-down so they can select it in their RFH Responses.



Notice to Vacate

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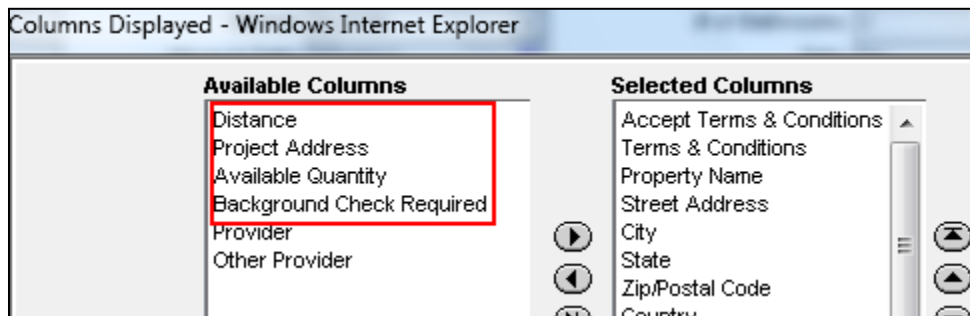
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epic Change # 3

Additional epic Response Fields Added

At the request of some of our *epic* clients, we've added these new fields to RFH Responses: Distance, Project Address, Available Quantity and Background Check Required. To begin using these fields, add them to the RFH Response applet using Menu>Columns Displayed>Available Items.



Columns Displayed - Windows Internet Explorer

Available Columns	Selected Columns
Distance	Accept Terms & Conditions
Project Address	Terms & Conditions
Available Quantity	Property Name
Background Check Required	Street Address
Provider	City
Other Provider	State
	Zip/Postal Code
	Country

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epic Enhancements, Continued

epic Change #4

Can Adjust Allowed Number of Responses Manually Added to the RFH Request Screen

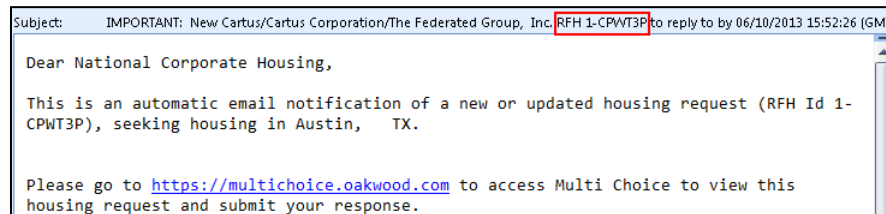
Previously, any Provider whose RFH Request was manually created (vs. being created using the Generate Requests button) could only provide one response.

This new enhancement allows *epic* admins to set the default maximum number of responses by RFH Type.

Example: All Oakwood Global Solutions providers can now provide up to three responses to each manually generated RFH Request.

epic Change #5

RFH ID in RFH Notification Email Subject Line



epic Change #7

Reminder Email Only Sent if Original Notification Email Sent

Previously, *epic* would send a reminder email even if we had never sent a Provider the original notification email. With this new enhancement, reminder emails will not be sent to those Providers that were never sent an original notification email.

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epic Enhancements, Continued

epic Change #8

Partner Portal Inbox Shows Only 'Sent' Provider RFH Requests

Previously, any RFH Request was visible to a Provider in their Partner Portal 'inbox' whether an email had been sent to the Provider or not.

Current RFH Requests = Provider epic 'inbox'

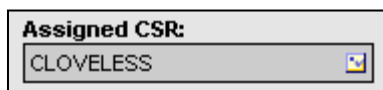
My Homepage		Welcome Back National Corp Housing Client. Today is			
Current RFH Requests		Menu ▾			
RFH Id	Request Deadline	# of Bedrooms	# of Bathrooms	Destination	
> 1-CPVWT3P	6/20/2013 8:51:47 PM	1	1	chicago, IL	
1-DD9613	5/17/2013 6:52:26 PM	1	1	LS	
CDM63241-63255	5/17/2013 1:00:00 PM	1		Cambridge, MA	

General Changes

General Change # 1

Assigned NAC Label Renamed to 'Assigned CSR'

To reflect Oakwood's new titles, Siebel Accounts now reflects Assigned CSR rather than Assigned NAC.



General Change # 2

New Insurance Oppty

To support Oakwood's new Insurance Housing Solution division, we've added a new opportunity type called Insurance. This oppty type contains insurance specific fields like Claim Number and is only available to Insurance Associates.

A screenshot of the Siebel 'Insurance More Info' form. The form is divided into several sections. The 'Opportunity Information' section is highlighted with a red box, showing 'Opportunity Type' as 'Insurance' and 'Oppty Sub-Type' as 'Home Rental'. The 'Claim Handler Information' section is also highlighted with a red box, showing 'Claim Number' as '119943'. The 'Guest Information' section shows 'Guest First Name' as 'Test' and 'Guest Last/Family Name' as 'Tester'. The 'Temporary Housing Details' section shows 'City' as 'Glendale, CA' and 'State' as 'CA'. The 'Hotel Needs' section shows 'Hotel Needed' as 'More than \$200' and '# of Rooms' as '1'. The 'Additional Guest/Insured Information' section shows 'Additional First Name' and 'Additional Last/Family Name' as empty fields. The 'Contact/Adjuster Handler Information' section shows 'Request Type' as 'STATE FARM' and 'Contact First Name' as '119943'. The 'Eligible for Commissions' section shows 'Referring (N)ACLC Name' as 'TRACY LEY' and 'Referring (N)ACLC SPD# (I)' as 'SAB2'. The 'Status' is 'Pending' and 'Status Updated' is '10/11/2012 03:25:07 PM'. The 'Created Date' is '10/11/2012 03:25:07 PM' and 'Created By' is 'SADMIN'. The 'Parent Opportunity' is 'SADMIN' and 'Sales Team' is 'SADMIN'. The 'Creator of Oppty' is 'SADMIN' and 'Creator Team' is 'TADM'. The 'Reference #' is '10/11/2012 03:25:07 PM' and 'Response Time Start' is '10/11/2012 03:25:07 PM'. The 'Response Time End' is '10/11/2012 03:25:07 PM' and 'Response Time Elapsed' is '10/11/2012 03:25:07 PM'. The 'Send to Project' button is visible. The 'Send Complete' button is also visible.

Note: In the near future, when an insurance housing request is submitted on Oakwood.com, Associates will see optties automatically created with an 'Insurance' type in Siebel.

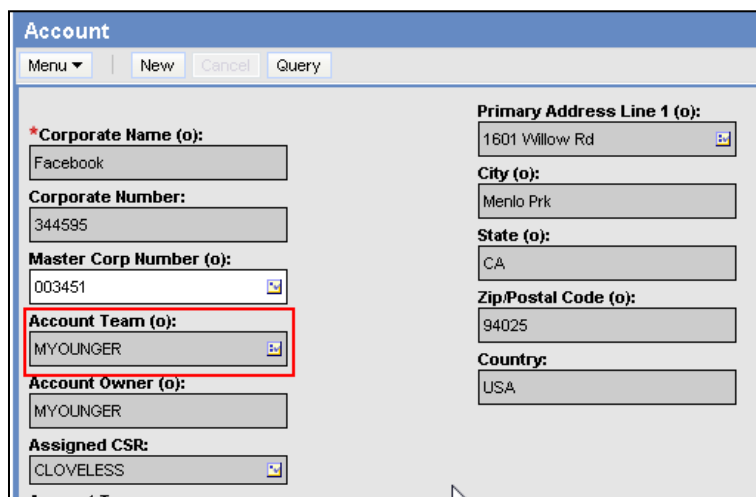
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General Changes, Continued

General Change # 3

Account Managers and Account Owners Visible in Account Sales Team

Click on the Account Team icon  to see who's on the team!



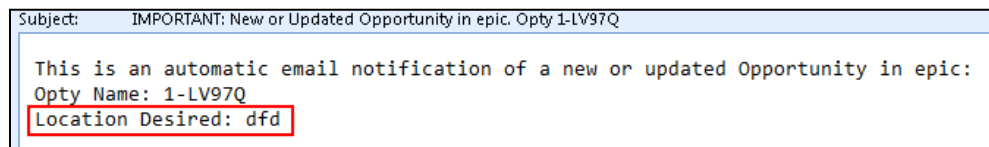
The screenshot shows the 'Account' form with various fields. The 'Account Team (o):' field is highlighted with a red box and contains the value 'MYOUNGER'. Other fields include 'Corporate Name (o):' (Facebook), 'Corporate Number:' (344595), 'Master Corp Number (o):' (003451), 'Primary Address Line 1 (o):' (1601 Willow Rd), 'City (o):' (Menlo Prk), 'State (o):' (CA), 'Zip/Postal Code (o):' (94025), 'Country:' (USA), 'Account Owner (o):' (MYOUNGER), and 'Assigned CSR:' (CLOVELESS).

Selected						1 - 3
	Primary	Last Name	First Name	Position /	Email	P
		LOVELESS	CYNTHIA	ACCOUNT COORDINATOR-6234	cloveless@oakwood.cc	
		BRAND	LISA	ACCOUNT MANAGER - 6394	lbrand@oakwood.com.t	
>	<input checked="" type="checkbox"/>	YOUNGER	MARY	SALES EXECUTIVE - 6283	myounger@oakwood.cc	

Note: The checked Associate is the Account Owner.

General Change # 4

Location Included in Franchisee Notification Email



The screenshot shows an email notification with the subject 'IMPORTANT: New or Updated Opportunity in epic. Opty 1-LV97Q'. The body text reads: 'This is an automatic email notification of a new or updated Opportunity in epic: Opty Name: 1-LV97Q'. The 'Location Desired: dfd' field is highlighted with a red box.

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General Changes, Continued

General Change # 5

Account Split % Fields Added to Account Ownership

To support Oakwood's new Sales Coverage and Sales Compensation models, Account Split % fields have been added to the Account Ownership screen.

Account Ownership											
Corporate		Corporate Number	New Owner %	New Owner	New Owner L	Start Date	End Date	# of Owners	Split 01 %	Split 01 SPID	Split 01 Login
> qa test0523		400003	37	6356	LOBRIEN	1/1/2013	5/23/2013	3	53	6719	ABARTLETT
qa test0523		400003	68	6ALZ	RPERELMAN	5/24/2013	12/31/2015	2	32	05534	ADOBSON

General Change # 6

TPM Checkbox Changed to 'Intl Contracted Account'

To reflect Oakwood's new Global approach, the TPM Checkbox has been renamed to read Intl Contracted Account.

Intl Contracted Account:



General Change # 7

Account Profile>Special Instructions Field Hold 2000 characters

To allow additional information to be noted in an Account Profile, the Special Instructions field has been adjusted to handle up to 2000 characters.

More Info	Activities	Opportunities	Attachments	Bill To/Credit	Account Invoice	Contacts	Profile	Account Team	More Info	Activities
Menu ▾ New Cancel										
Referral Name on Check:		Housekeeping Services:		Approved Length of Stay:						
<input type="text"/>		<input type="text"/>		<input type="text"/>						
Referral Fee Amount:		Home Services Packages:		Notice to Vacate:						
<input type="text"/>		<input type="text"/>		<input type="text"/>						
Referral Mail to Attn:		Add'l Home Services Packages:		Special Instructions:						
<input type="text"/>		<input type="text"/>		<input type="text"/>						
Referral Federal Tax Id:		Furniture and Appliance Needs:		Brand to offer:						
<input type="text"/>		<input type="text"/>		<input type="text"/>						

Summary

It is with great pleasure that the Siebel Team and Oakwood University bring you these enhancements. Begin using them as of June 1, 2013. Enjoy!