Chapter 02 Images

Company Profile

Company Profile - Update company information and set default language, currency and time zone.

Sign In and Password Control - Set sign in and password policies.

Languages - Activate or deactivate languages for your company.

Security Settings - Restrict user sign ins to specific IP addresses.

Fiscal Calendar Administration

Fiscal Calendar Definition - Define the fiscal year start and corresponding fiscal period duration for your company.

Currency Definition

Currency Definition - Activate currencies that your company transacts business in and provide exchange rates for use in company Forecast and reporting roll-ups.

Exchange Rates - Define currency exchange rates for your company's base currency.

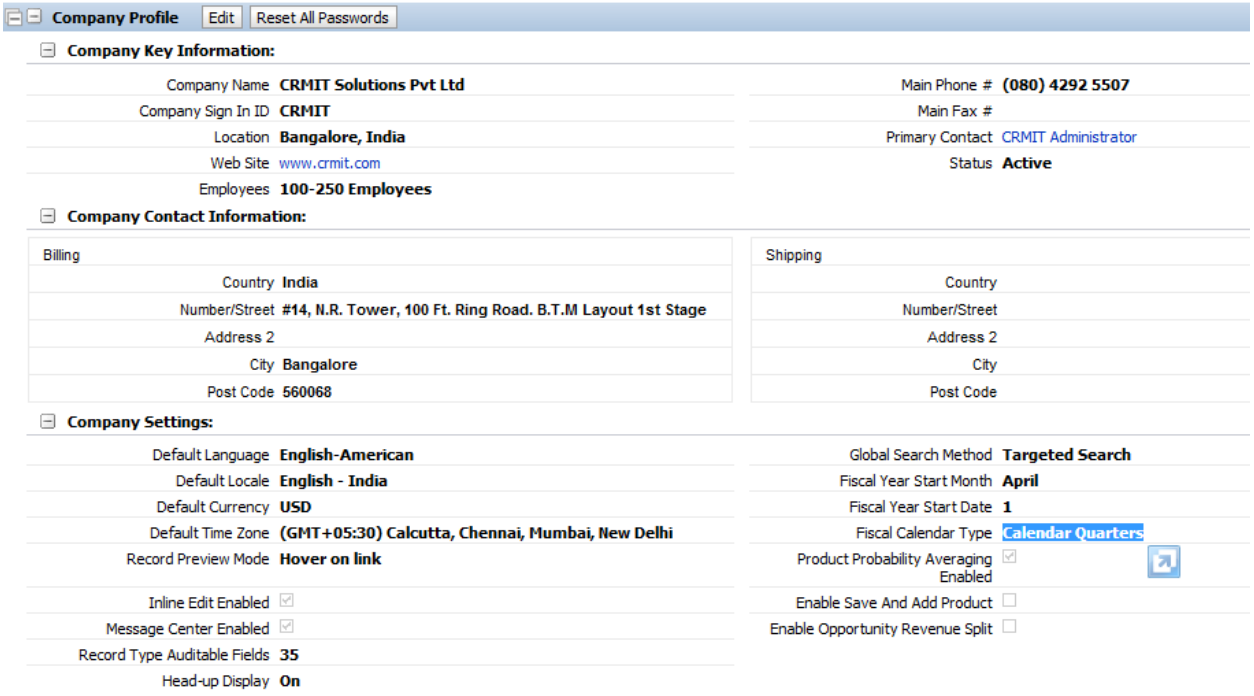
Resource Audit

Sign In Audit - Review company sign in history.

Audit - Review Company Audit

Alert Management

Company Alerts - Broadcast time-based, critical information to your company users.



Company Key Information:

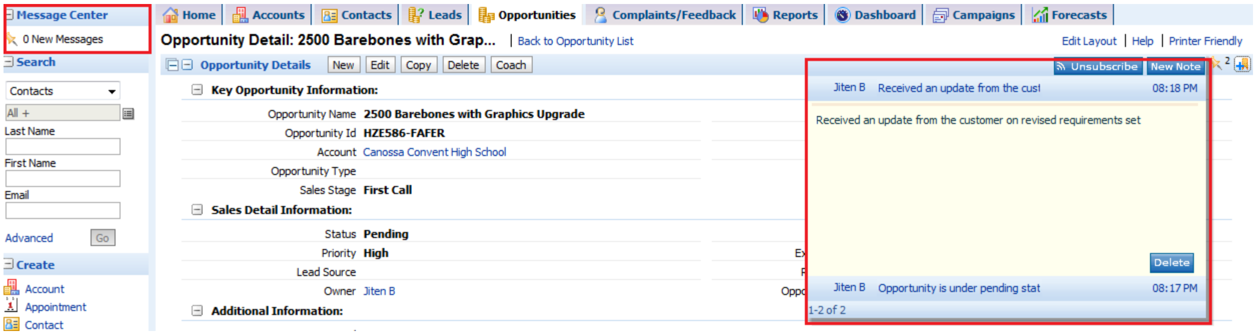
Company Name	CRMIT Solutions Pvt Ltd	Main Phone #	(080) 4292 5507
Company Sign In ID	CRMIT	Main Fax #	
Location	Bangalore, India	Primary Contact	CRMIT Administrator
Web Site	www.crmit.com	Status	Active
Employees	100-250 Employees		

Company Contact Information:

Billing		Shipping	
Country	India	Country	
Number/Street	#14, N.R. Tower, 100 Ft. Ring Road. B.T.M Layout 1st Stage	Number/Street	
Address 2		Address 2	
City	Bangalore	City	
Post Code	560068	Post Code	

Company Settings:

Default Language	English-American	Global Search Method	Targeted Search
Default Locale	English - India	Fiscal Year Start Month	April
Default Currency	USD	Fiscal Year Start Date	1
Default Time Zone	(GMT+05:30) Calcutta, Chennai, Mumbai, New Delhi	Fiscal Calendar Type	Calendar Quarters
Record Preview Mode	Hover on link	Product Probability Averaging Enabled	☑
Inline Edit Enabled	☑	Enable Save And Add Product	☐
Message Center Enabled	☑	Enable Opportunity Revenue Split	☐
Record Type Auditable Fields	35		
Head-up Display	On		



Opportunity Detail: 2500 Barebones with Grap...

Key Opportunity Information:

Opportunity Name	2500 Barebones with Graphics Upgrade
Opportunity Id	HZE586-FAFER
Account	Canossa Convent High School
Opportunity Type	
Sales Stage	First Call

Sales Detail Information:

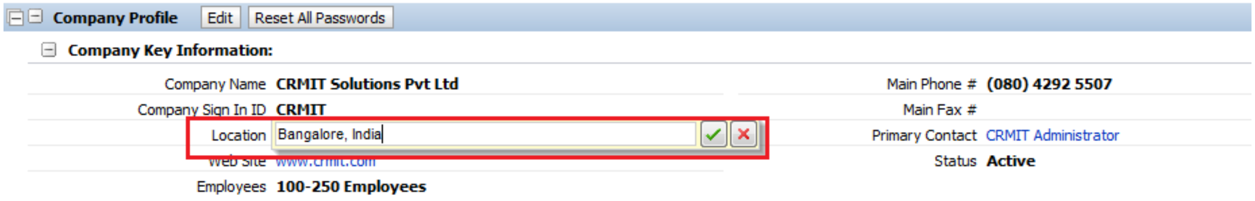
Status	Pending
Priority	High
Lead Source	
Owner	Jiten B

Additional Information:

Jiten B	Received an update from the cust	08:18 PM
Jiten B	Opportunity is under pending stat	08:17 PM

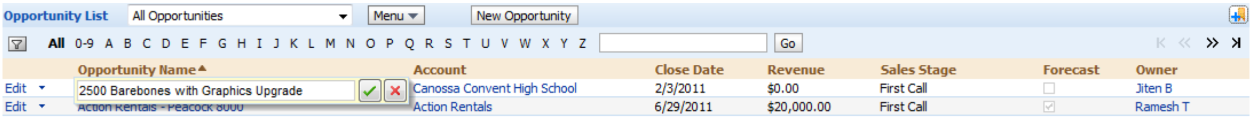
Received an update from the customer on revised requirements set

1-2 of 2



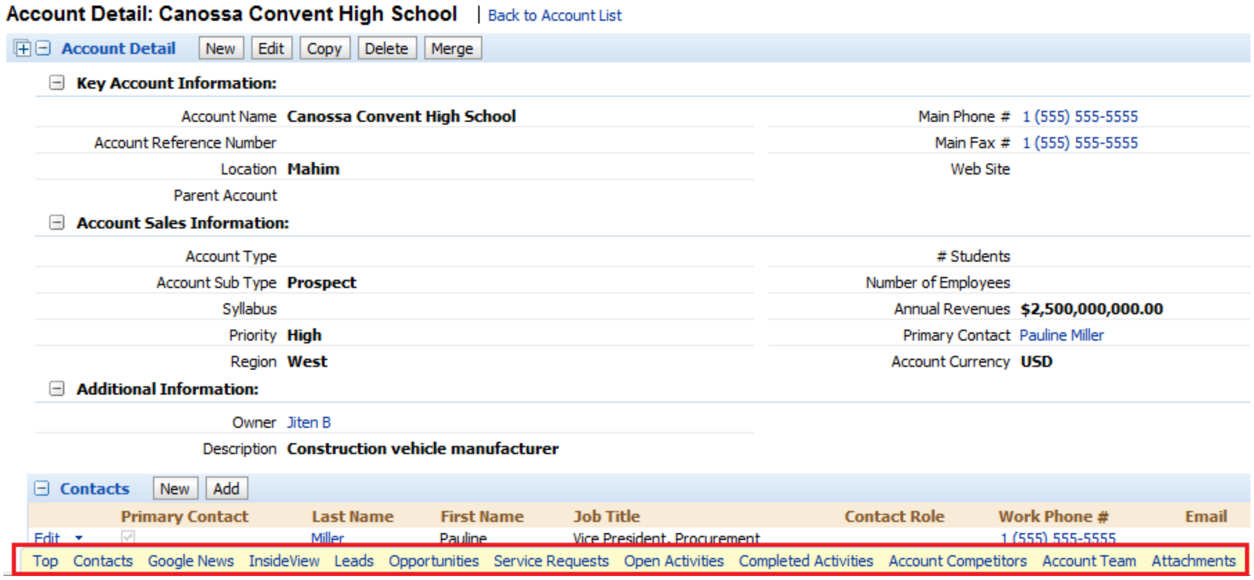
Company Key Information:

Company Name	**CRMIT Solutions Pvt Ltd**	Main Phone #	**(080) 4292 5507**
Company Sign In ID	**CRMIT**	Main Fax #	
Location	Bangalore, India	Primary Contact	CRMIT Administrator
Web Site	www.crmit.com	Status	**Active**
Employees	**100-250 Employees**		



	Opportunity Name	Account	Close Date	Revenue	Sales Stage	Forecast	Owner
Edit	2500 Barebones with Graphics Upgrade	Canossa Convent High School	2/3/2011	$0.00	First Call	☐	Jiten B
Edit	Action Rentals - Peacock 8000	Action Rentals	6/29/2011	$20,000.00	First Call	☑	Ramesh T

	Last Name	First Name	Account	Work Phone #	Cellular Phone #	Email	Owner	Department
Edit	Allen	Doug	Action Rentals	1 (650) 111-2222		dallen@actionrentals-od.com	Ramesh T	Executive Office
Edit	Anderson	Howard	Armex plc	1 (872) 296-9857	1 (872) 545-3373	handerson@armexplc-od.com	Ramesh T	Executive Office
Edit	Axelrod	Mary	Hartman & Associates	1 (872) 296-9825	1 (872) 584-3523	maxelrod@hartmanandassoc-od.com	Donna Jones	Marketing



Account Detail: Canossa Convent High School

Key Account Information:

Account Name	**Canossa Convent High School**	Main Phone #	1 (555) 555-5555
Account Reference Number		Main Fax #	1 (555) 555-5555
Location	**Mahim**	Web Site	
Parent Account			

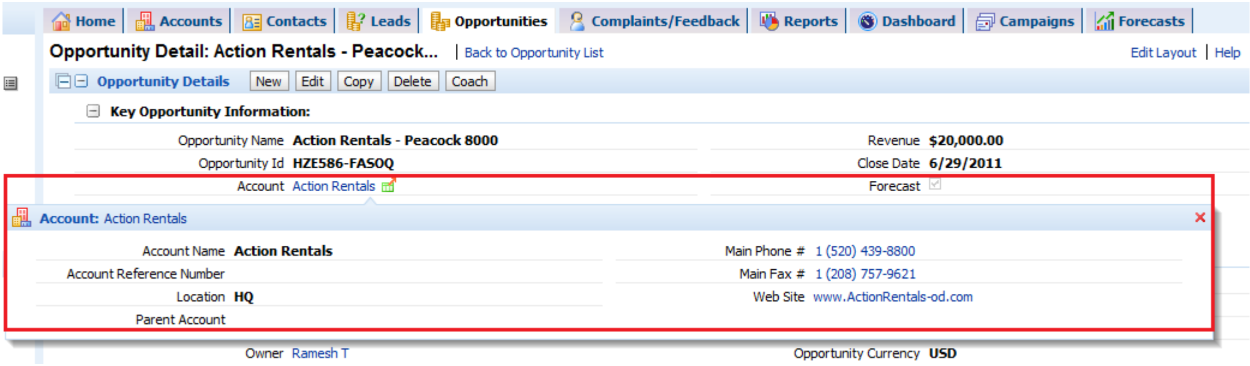
Account Sales Information:

Account Type		# Students	
Account Sub Type	**Prospect**	Number of Employees	
Syllabus		Annual Revenues	**$2,500,000,000.00**
Priority	**High**	Primary Contact	Pauline Miller
Region	**West**	Account Currency	**USD**

Additional Information:

Owner	Jiten B
Description	**Construction vehicle manufacturer**

	Primary Contact	Last Name	First Name	Job Title	Contact Role	Work Phone #	Email
Edit	☑	Miller	Pauline	Vice President, Procurement		1 (555) 555-5555	



Opportunity Detail: Action Rentals - Peacock...

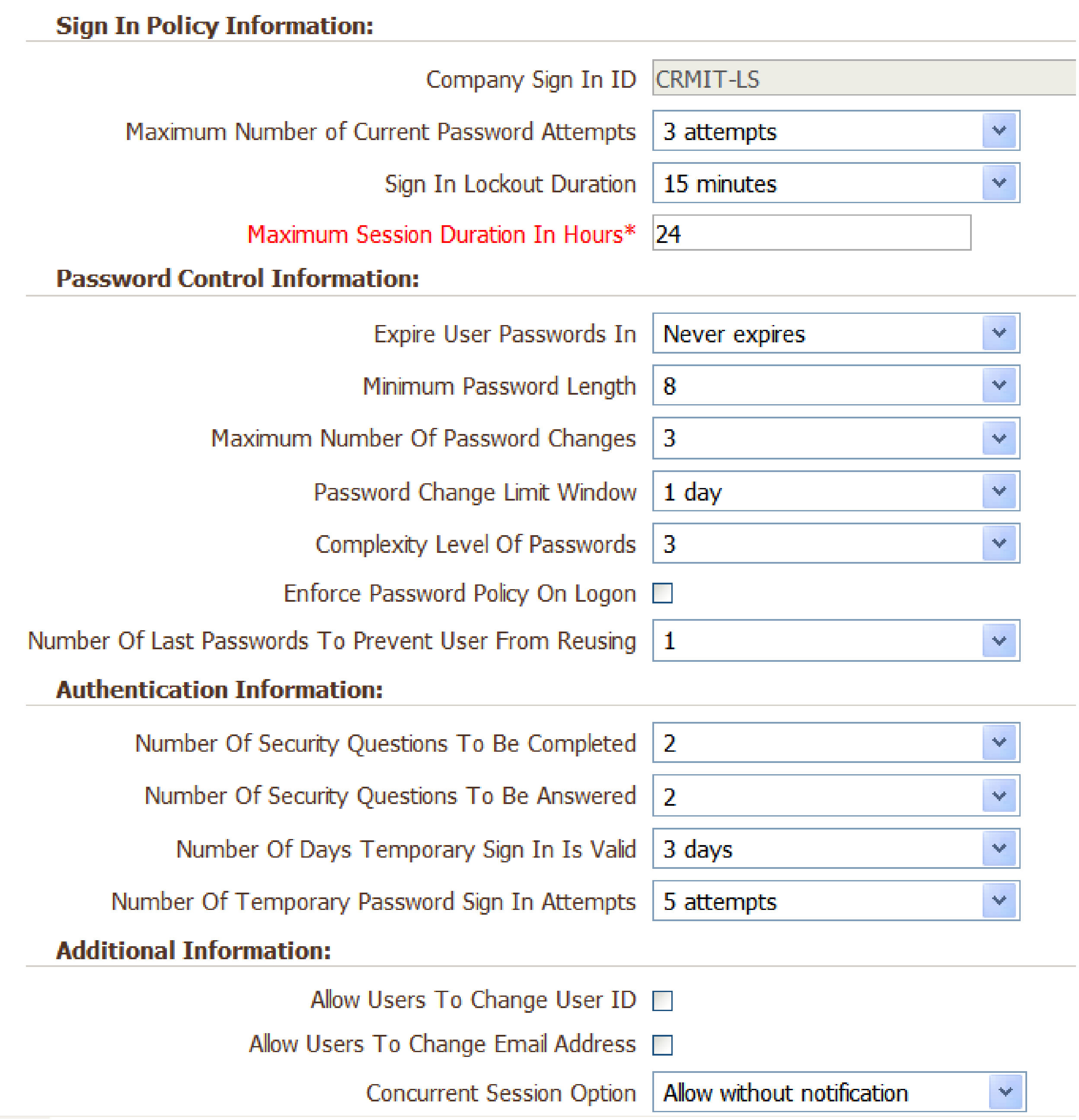
Key Opportunity Information:

Opportunity Name **Action Rentals - Peacock 8000**
Revenue **$20,000.00**
Opportunity Id **HZE586-FASOQ**
Close Date **6/29/2011**
Account Action Rentals
Forecast ☑

Account: Action Rentals

Account Name **Action Rentals**
Main Phone # 1 (520) 439-8800
Account Reference Number
Main Fax # 1 (208) 757-9621
Location **HQ**
Web Site www.ActionRentals-od.com
Parent Account

Owner Ramesh T
Opportunity Currency **USD**



Sign In Policy Information:

Company Sign In ID CRMIT-LS
Maximum Number of Current Password Attempts 3 attempts
Sign In Lockout Duration 15 minutes
Maximum Session Duration In Hours* 24

Password Control Information:

Expire User Passwords In Never expires
Minimum Password Length 8
Maximum Number Of Password Changes 3
Password Change Limit Window 1 day
Complexity Level Of Passwords 3
Enforce Password Policy On Logon ☐
Number Of Last Passwords To Prevent User From Reusing 1

Authentication Information:

Number Of Security Questions To Be Completed 2
Number Of Security Questions To Be Answered 2
Number Of Days Temporary Sign In Is Valid 3 days
Number Of Temporary Password Sign In Attempts 5 attempts

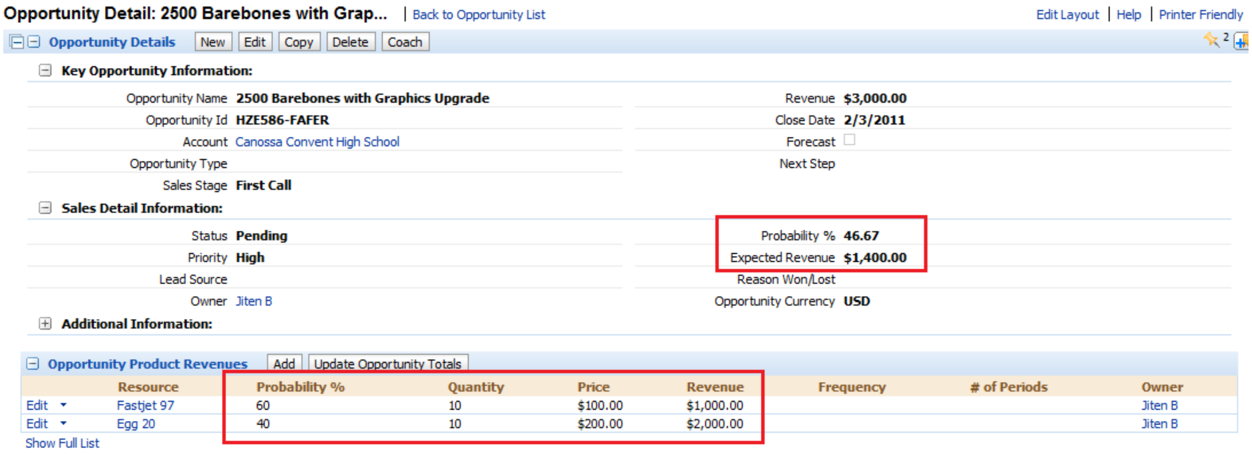
Additional Information:

Allow Users To Change User ID ☐
Allow Users To Change Email Address ☐
Concurrent Session Option Allow without notification

Search Results

Contacts

Last Name	First Name	Account	Work Phone #	Cellular Phone #	Email	Owner	Department
Anderson	Howard	Armex plc	1 (872) 296-9857	1 (872) 545-3373	handerson@armexplc-od.com	Ramesh T	Executive Office
Bane	Teresa	Armex plc	1 (872) 296-6809	1 (872) 372-3416	tbane@armexplc-od.com	Jeff Smith	Sales
Bragg	John	Armex plc	1 (872) 296-6818	1 (872) 826-9686	jbragg@armexplc-od.com	Amanda Jacobsen	Marketing



Opportunity Detail: 2500 Barebones with Grap...

Key Opportunity Information:

Opportunity Name **2500 Barebones with Graphics Upgrade**
Opportunity Id **HZE586-FAFER**
Account Canossa Convent High School
Opportunity Type
Sales Stage **First Call**
Revenue **$3,000.00**
Close Date **2/3/2011**
Forecast ☐
Next Step

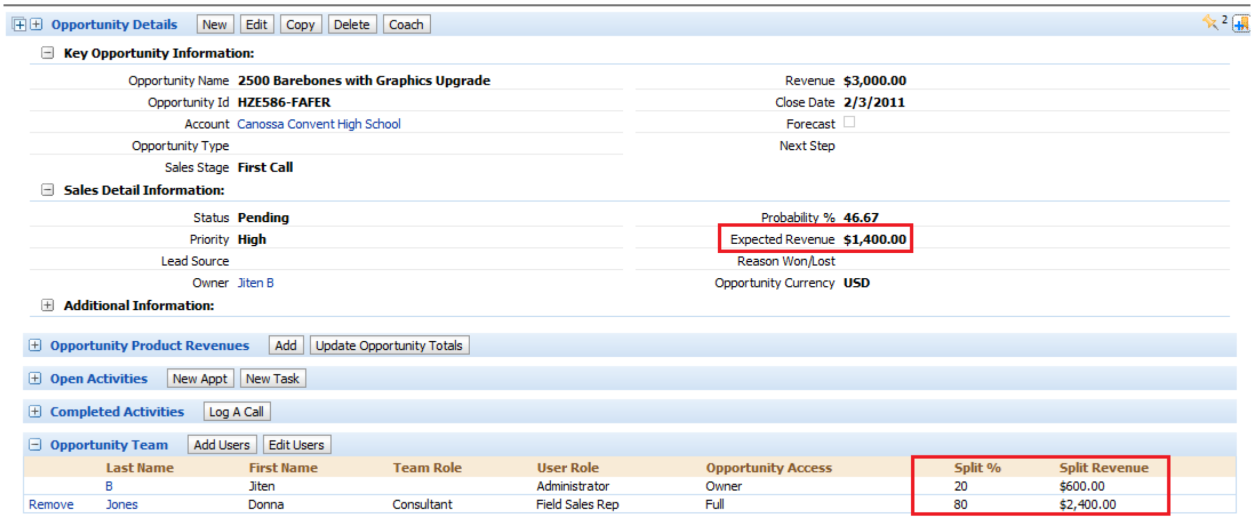
Sales Detail Information:

Status **Pending**
Priority **High**
Lead Source
Owner Jiten B
Probability % **46.67**
Expected Revenue **$1,400.00**
Reason Won/Lost
Opportunity Currency **USD**

Additional Information:

Opportunity Product Revenues

	Resource	Probability %	Quantity	Price	Revenue	Frequency	# of Periods	Owner
Edit	Fastjet 97	60	10	$100.00	$1,000.00			Jiten B
Edit	Egg 20	40	10	$200.00	$2,000.00			Jiten B



Key Opportunity Information:

Opportunity Name **2500 Barebones with Graphics Upgrade**
Opportunity Id **HZE586-FAFER**
Account Canossa Convent High School
Opportunity Type
Sales Stage **First Call**
Revenue **$3,000.00**
Close Date **2/3/2011**
Forecast ☐
Next Step

Sales Detail Information:

Status **Pending**
Priority **High**
Lead Source
Owner Jiten B
Probability % **46.67**
Expected Revenue **$1,400.00**
Reason Won/Lost
Opportunity Currency **USD**

Additional Information:

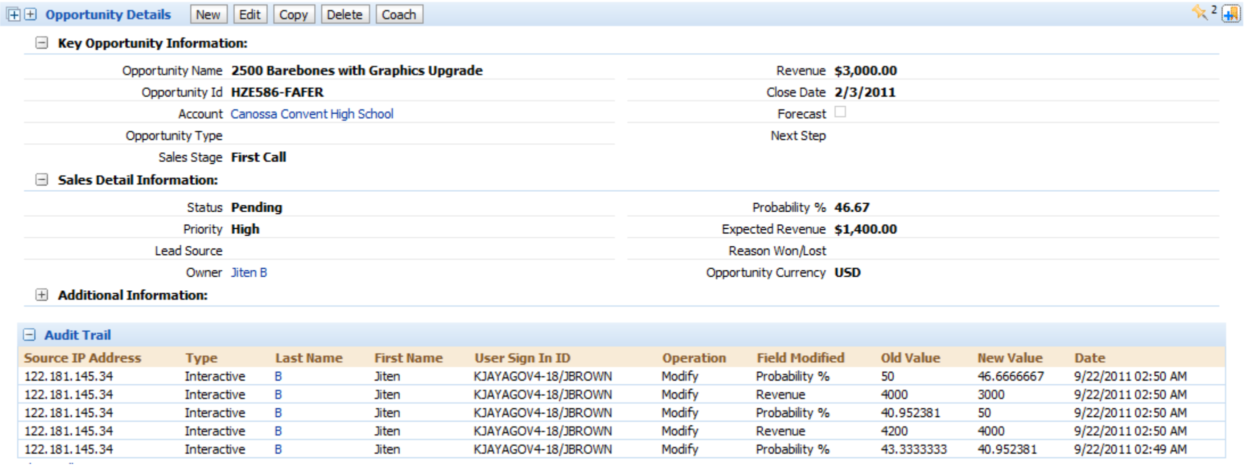
Opportunity Product Revenues

Open Activities

Completed Activities

Opportunity Team

	Last Name	First Name	Team Role	User Role	Opportunity Access	Split %	Split Revenue
	B	Jiten		Administrator	Owner	20	$600.00
Remove	Jones	Donna	Consultant	Field Sales Rep	Full	80	$2,400.00



Key Opportunity Information:

Opportunity Name	**2500 Barebones with Graphics Upgrade**	Revenue	**$3,000.00**
Opportunity Id	**HZE586-FAFER**	Close Date	**2/3/2011**
Account	Canossa Convent High School	Forecast	☐
Opportunity Type		Next Step	
Sales Stage	**First Call**		

Sales Detail Information:

Status	**Pending**	Probability %	**46.67**
Priority	**High**	Expected Revenue	**$1,400.00**
Lead Source		Reason Won/Lost	
Owner	Jiten B	Opportunity Currency	**USD**

Additional Information:

Audit Trail

Source IP Address	Type	Last Name	First Name	User Sign In ID	Operation	Field Modified	Old Value	New Value	Date
122.181.145.34	Interactive	B	Jiten	KJAYAGOV4-18/JBROWN	Modify	Probability %	50	46.6666667	9/22/2011 02:50 AM
122.181.145.34	Interactive	B	Jiten	KJAYAGOV4-18/JBROWN	Modify	Revenue	4000	3000	9/22/2011 02:50 AM
122.181.145.34	Interactive	B	Jiten	KJAYAGOV4-18/JBROWN	Modify	Probability %	40.952381	50	9/22/2011 02:50 AM
122.181.145.34	Interactive	B	Jiten	KJAYAGOV4-18/JBROWN	Modify	Revenue	4200	4000	9/22/2011 02:50 AM
122.181.145.34	Interactive	B	Jiten	KJAYAGOV4-18/JBROWN	Modify	Probability %	43.3333333	40.952381	9/22/2011 02:49 AM

Theme Detail: Technology

| Back to Themes

Theme Detail Copy

General Information

Theme Name **Technology**
Theme Type **System**
Show Default Help Link ☑
Show Default Training and Support Link ☑
Application Background 🟩 **#8BBB00**
Application Text ☐ **#FFFFFF**
Application Links ☐ **#FFFFFF**
Alert Text 🟥 **#FF4D00**

Tabs

Tab Style **Rounded**
Active Tab Text ☐ **#FFFFFF**
Active Tab Background 🟩 **#236303**
Inactive Tab Text 🟩 **#236303**
Inactive Tab Background - Top 🟩 **#BEFC46**
Inactive Tab Background - Bottom 🟩 **#359D00**
Inactive Tab Background Hover 🟩 **#9DE07B**

Company Data Visibility Settings:

Manager Visibility Enabled ☑
Enable Parent Team Inheritance ☑
Default Group Assignment ☐
Enable Books ☑
Display Book Selector ☑

Integration Settings:

Integration Event Enabled ☑
Web Services R16 Compatibility Mode ☑
Enable Workflow ☑

Desktop Integration Settings

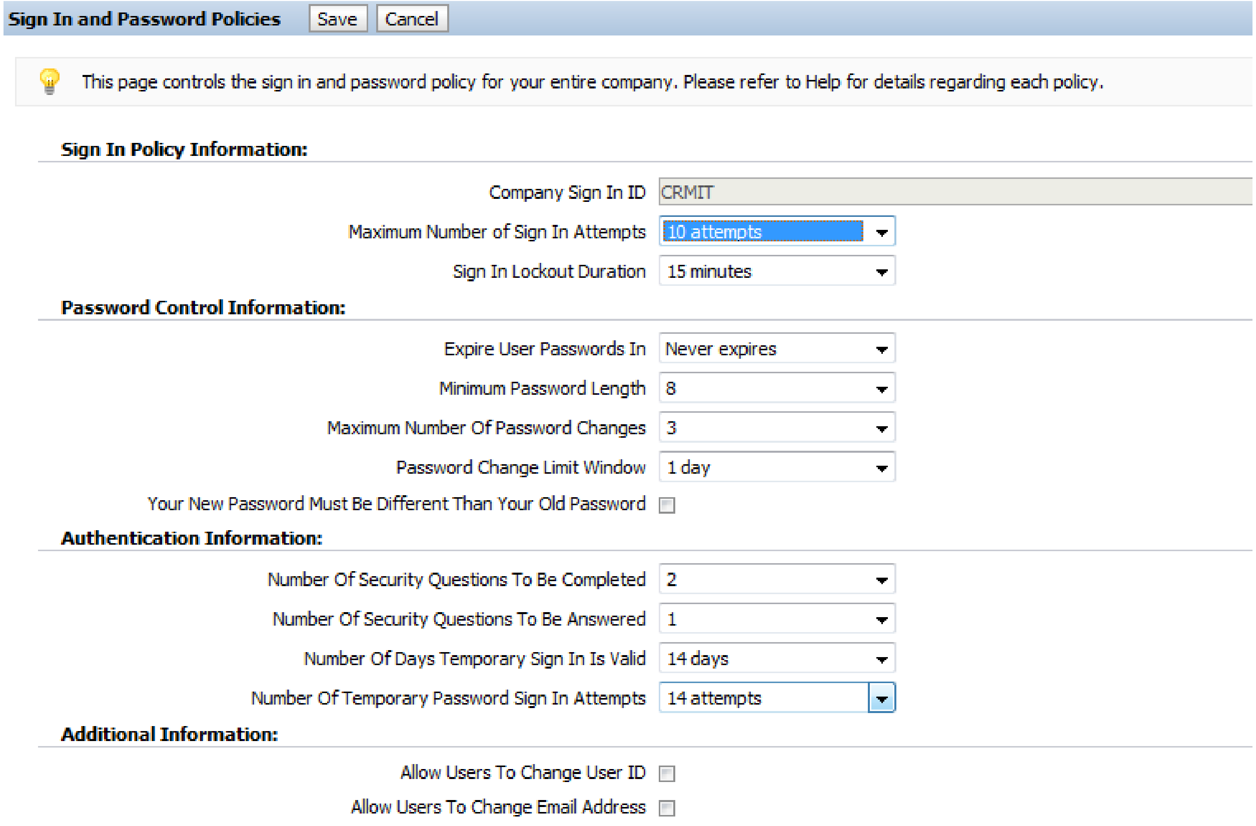
Alternate PIM Sync Download URL
Disable Access to PIM Sync Download Page ☐
Disable PIM Sync Extended Account Association ☐
Disable PIM Sync Account Association ☐
Offline Client Edit Access **Verify on Download**

Company Security Settings

Company Idle Timeout (minutes)
Authentication Type **User ID/PWD or Single Sign-On**
External Identifier for Single Sign-On **KJAYAGOV4-18**
Sign In Page for Userid/Pwd Authentications
Sign In Page for SSO Authentications
ITS URL for SSO Authentications
IP Address Restrictions Enabled ☐
Inline Attachment Open Enabled ☑
Cross-Site Request Forgery Protection Enabled ☑
Enable IFRAME embedding ☐

Analytics Visibility Setting

Reporting Subject Areas **Manager Visibility**
Historical Subject Areas **Manager Visibility**
Role-Based Can Read All Records



Sign In and Password Policies

This page controls the sign in and password policy for your entire company. Please refer to Help for details regarding each policy.

Sign In Policy Information:

Company Sign In ID: CRMIT
Maximum Number of Sign In Attempts: 10 attempts
Sign In Lockout Duration: 15 minutes

Password Control Information:

Expire User Passwords In: Never expires
Minimum Password Length: 8
Maximum Number Of Password Changes: 3
Password Change Limit Window: 1 day
Your New Password Must Be Different Than Your Old Password ☐

Authentication Information:

Number Of Security Questions To Be Completed: 2
Number Of Security Questions To Be Answered: 1
Number Of Days Temporary Sign In Is Valid: 14 days
Number Of Temporary Password Sign In Attempts: 14 attempts

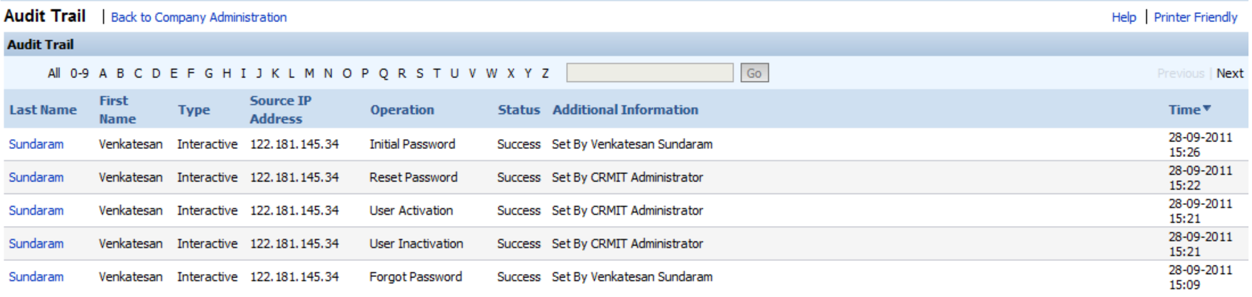
Additional Information:

Allow Users To Change User ID ☐
Allow Users To Change Email Address ☐

Sign In Audit

Sign In History

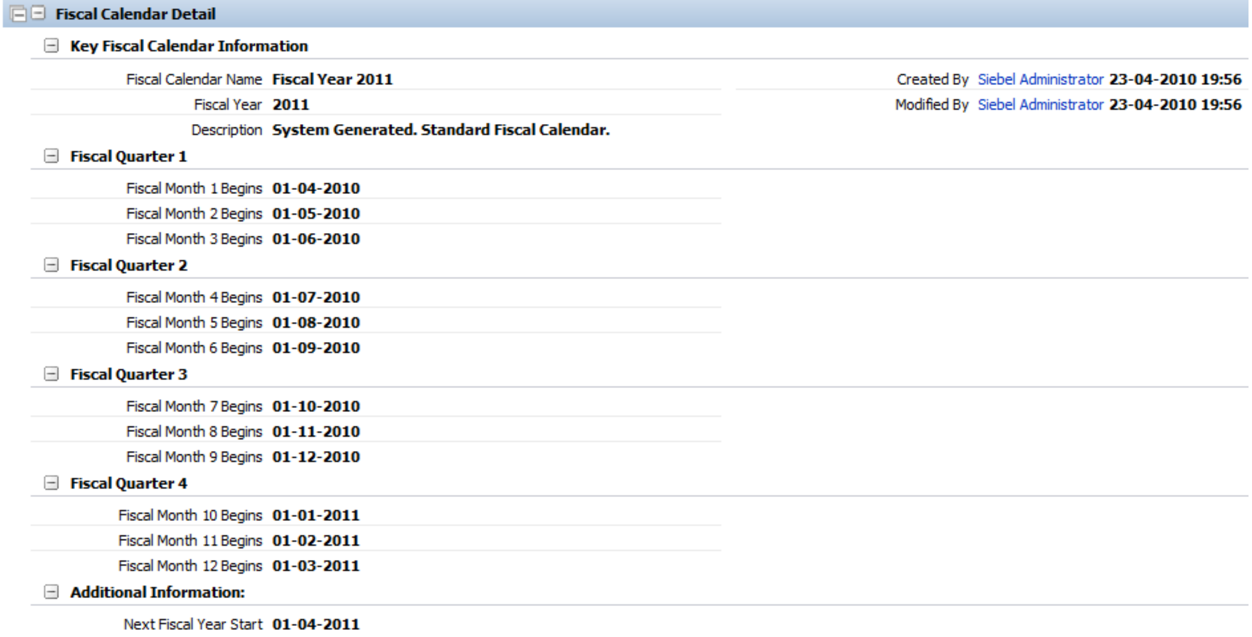
Last Name	First Name	Source IP Address	Sign In Status	Additional Information	Type	Sign In Time ▼	Sign Out Time
Administrator	CRMIT	144.20.66.210	Success		Web Services	29-09-2011 13:00	29-09-2011 13:00
Administrator	CRMIT	144.20.66.210	Success		Web Services	29-09-2011 12:45	29-09-2011 12:45
Administrator	CRMIT	50.19.228.108	Success		Web Services	29-09-2011 12:42	29-09-2011 12:42
Administrator	CRMIT	50.19.228.108	Success		Web Services	29-09-2011 12:39	29-09-2011 12:39
Administrator	CRMIT	50.19.228.108	Success		Web Services	29-09-2011 12:36	29-09-2011 12:36
Administrator	CRMIT	50.19.228.108	Success		Web Services	29-09-2011 12:33	29-09-2011 12:33



Audit Trail

Audit Trail

Last Name	First Name	Type	Source IP Address	Operation	Status	Additional Information	Time ▼
Sundaram	Venkatesan	Interactive	122.181.145.34	Initial Password	Success	Set By Venkatesan Sundaram	28-09-2011 15:26
Sundaram	Venkatesan	Interactive	122.181.145.34	Reset Password	Success	Set By CRMIT Administrator	28-09-2011 15:22
Sundaram	Venkatesan	Interactive	122.181.145.34	User Activation	Success	Set By CRMIT Administrator	28-09-2011 15:21
Sundaram	Venkatesan	Interactive	122.181.145.34	User Inactivation	Success	Set By CRMIT Administrator	28-09-2011 15:21
Sundaram	Venkatesan	Interactive	122.181.145.34	Forgot Password	Success	Set By Venkatesan Sundaram	28-09-2011 15:09



Fiscal Calendar Detail

Key Fiscal Calendar Information

Fiscal Calendar Name: **Fiscal Year 2011**
Fiscal Year: **2011**
Description: **System Generated. Standard Fiscal Calendar.**
Created By: Siebel Administrator **23-04-2010 19:56**
Modified By: Siebel Administrator **23-04-2010 19:56**

Fiscal Quarter 1

Fiscal Month 1 Begins: **01-04-2010**
Fiscal Month 2 Begins: **01-05-2010**
Fiscal Month 3 Begins: **01-06-2010**

Fiscal Quarter 2

Fiscal Month 4 Begins: **01-07-2010**
Fiscal Month 5 Begins: **01-08-2010**
Fiscal Month 6 Begins: **01-09-2010**

Fiscal Quarter 3

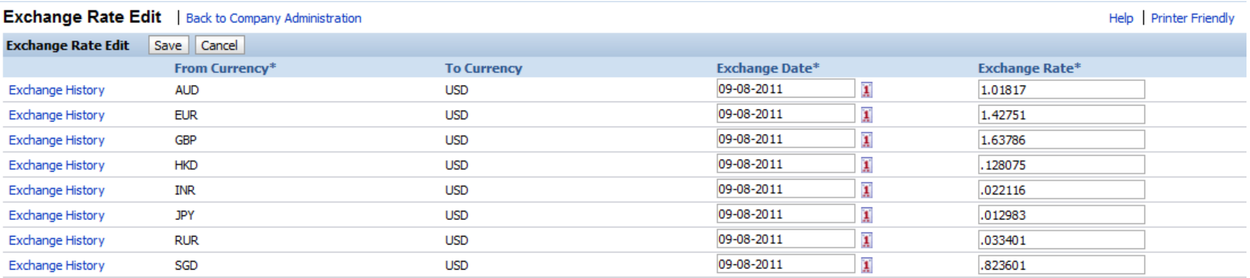
Fiscal Month 7 Begins: **01-10-2010**
Fiscal Month 8 Begins: **01-11-2010**
Fiscal Month 9 Begins: **01-12-2010**

Fiscal Quarter 4

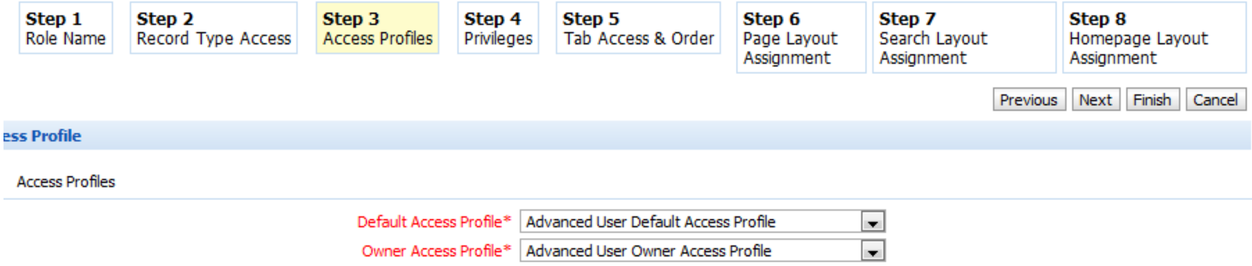
Fiscal Month 10 Begins: **01-01-2011**
Fiscal Month 11 Begins: **01-02-2011**
Fiscal Month 12 Begins: **01-03-2011**

Additional Information:

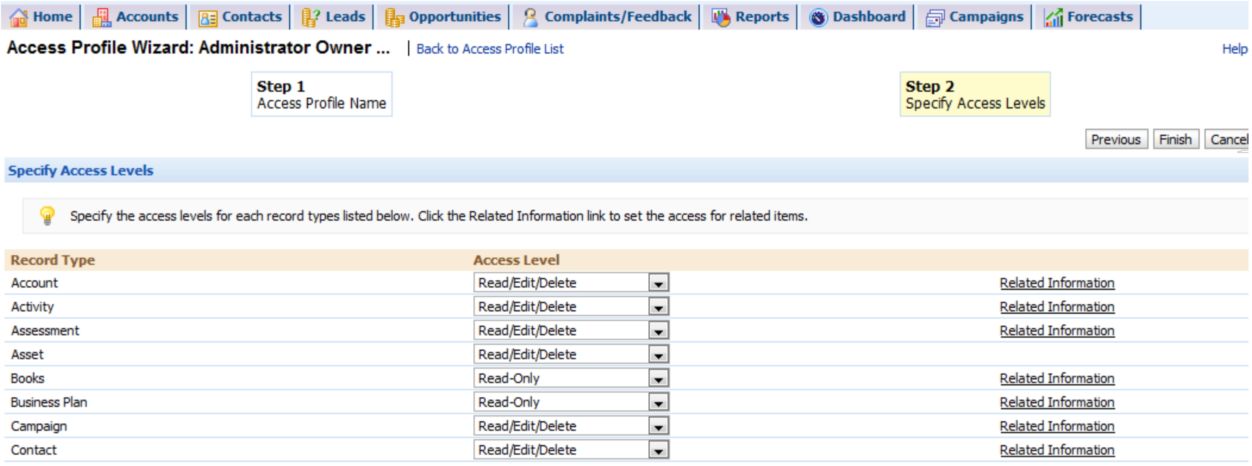
Next Fiscal Year Start: **01-04-2011**



	From Currency*	To Currency	Exchange Date*	Exchange Rate*
Exchange History	AUD	USD	09-08-2011	1.01817
Exchange History	EUR	USD	09-08-2011	1.42751
Exchange History	GBP	USD	09-08-2011	1.63786
Exchange History	HKD	USD	09-08-2011	.128075
Exchange History	INR	USD	09-08-2011	.022116
Exchange History	JPY	USD	09-08-2011	.012983
Exchange History	RUR	USD	09-08-2011	.033401
Exchange History	SGD	USD	09-08-2011	.823601



Default Access Profile*: Advanced User Default Access Profile
Owner Access Profile*: Advanced User Owner Access Profile



Access Profile Wizard: Administrator Owner ... | Back to Access Profile List

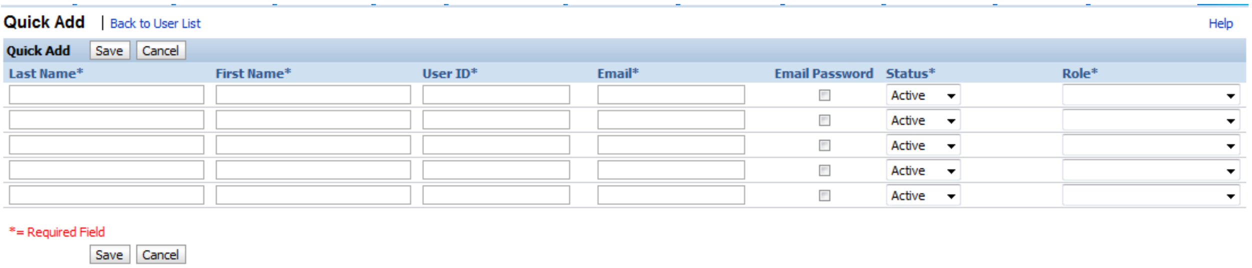
Step 1
Access Profile Name

Step 2
Specify Access Levels

Specify Access Levels

Specify the access levels for each record types listed below. Click the Related Information link to set the access for related items.

Record Type	Access Level	
Account	Read/Edit/Delete	Related Information
Activity	Read/Edit/Delete	Related Information
Assessment	Read/Edit/Delete	Related Information
Asset	Read/Edit/Delete	
Books	Read-Only	Related Information
Business Plan	Read-Only	Related Information
Campaign	Read/Edit/Delete	Related Information
Contact	Read/Edit/Delete	Related Information

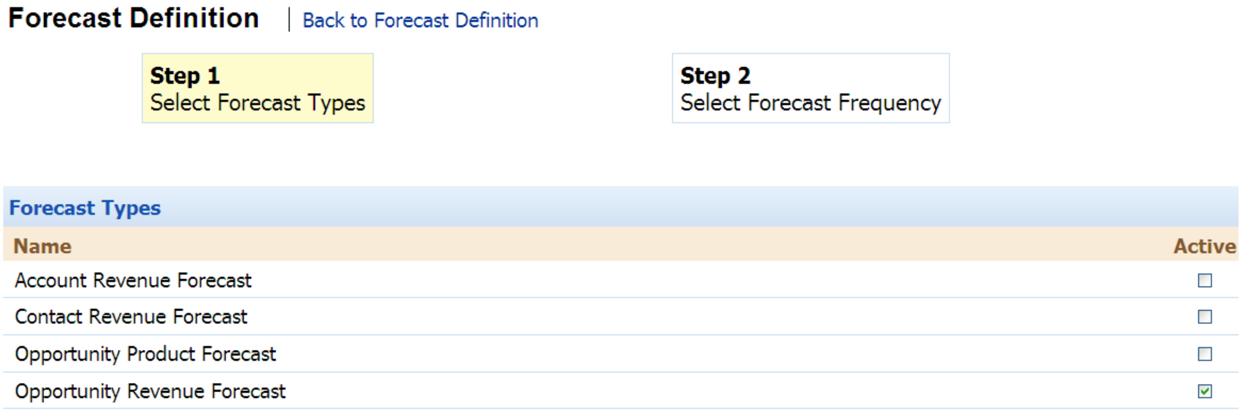


Quick Add | Back to User List

Quick Add

Last Name*	First Name*	User ID*	Email*	Email Password	Status*	Role*
				☐	Active	
				☐	Active	
				☐	Active	
				☐	Active	
				☐	Active	

*= Required Field



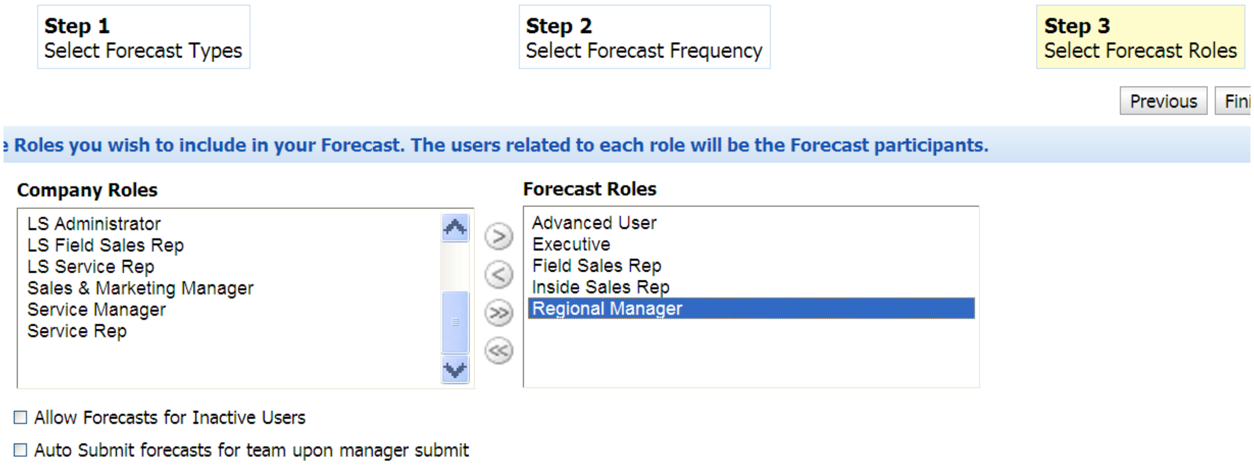
Forecast Definition | Back to Forecast Definition

Step 1
Select Forecast Types

Step 2
Select Forecast Frequency

Forecast Types

Name	Active
Account Revenue Forecast	☐
Contact Revenue Forecast	☐
Opportunity Product Forecast	☐
Opportunity Revenue Forecast	☑



Roles you wish to include in your Forecast. The users related to each role will be the Forecast participants.

Company Roles

- LS Administrator
- LS Field Sales Rep
- LS Service Rep
- Sales & Marketing Manager
- Service Manager
- Service Rep

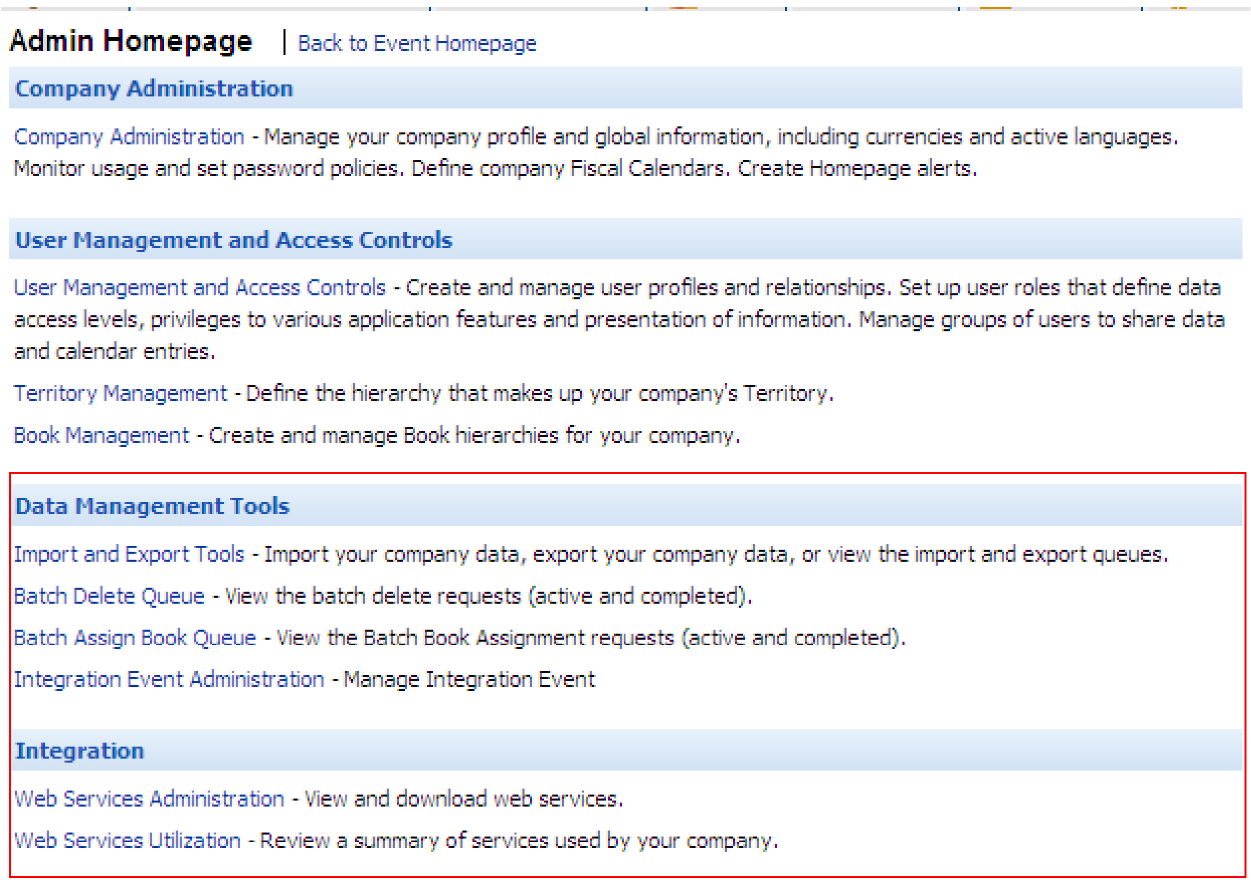
Forecast Roles

- Advanced User
- Executive
- Field Sales Rep
- Inside Sales Rep
- Regional Manager

☐ Allow Forecasts for Inactive Users

☐ Auto Submit forecasts for team upon manager submit

Chapter 03 Images



Company Administration

Company Administration - Manage your company profile and global information, including currencies and active languages. Monitor usage and set password policies. Define company Fiscal Calendars. Create Homepage alerts.

User Management and Access Controls

User Management and Access Controls - Create and manage user profiles and relationships. Set up user roles that define data access levels, privileges to various application features and presentation of information. Manage groups of users to share data and calendar entries.

Territory Management - Define the hierarchy that makes up your company's Territory.

Book Management - Create and manage Book hierarchies for your company.

Data Management Tools

Import and Export Tools - Import your company data, export your company data, or view the import and export queues.

Batch Delete Queue - View the batch delete requests (active and completed).

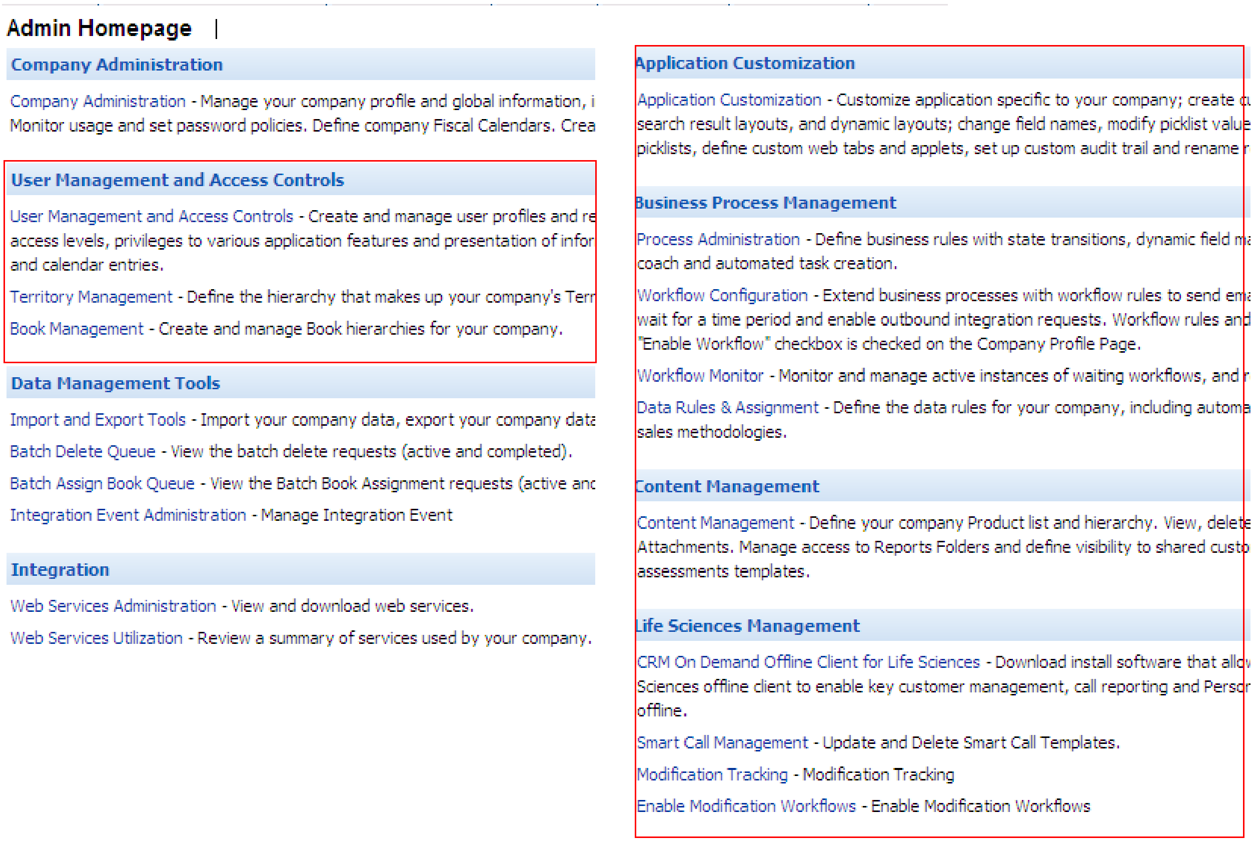
Batch Assign Book Queue - View the Batch Book Assignment requests (active and completed).

Integration Event Administration - Manage Integration Event

Integration

Web Services Administration - View and download web services.

Web Services Utilization - Review a summary of services used by your company.



Admin Homepage |

Company Administration

Company Administration - Manage your company profile and global information, i
Monitor usage and set password policies. Define company Fiscal Calendars. Crea

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Data Management Tools

Import and Export Tools - Import your company data, export your company data

Batch Delete Queue - View the batch delete requests (active and completed).

Batch Assign Book Queue - View the Batch Book Assignment requests (active anc

Integration Event Administration - Manage Integration Event

Integration

Web Services Administration - View and download web services.

Web Services Utilization - Review a summary of services used by your company.

Application Customization

Application Customization - Customize application specific to your company; create c
search result layouts, and dynamic layouts; change field names, modify picklist value
picklists, define custom web tabs and applets, set up custom audit trail and rename r

Business Process Management

Process Administration - Define business rules with state transitions, dynamic field ma
coach and automated task creation.

Workflow Configuration - Extend business processes with workflow rules to send ema
wait for a time period and enable outbound integration requests. Workflow rules and
"Enable Workflow" checkbox is checked on the Company Profile Page.

Workflow Monitor - Monitor and manage active instances of waiting workflows, and r

Data Rules & Assignment - Define the data rules for your company, including automa
sales methodologies.

Content Management

Content Management - Define your company Product list and hierarchy. View, delete
Attachments. Manage access to Reports Folders and define visibility to shared custo
assessments templates.

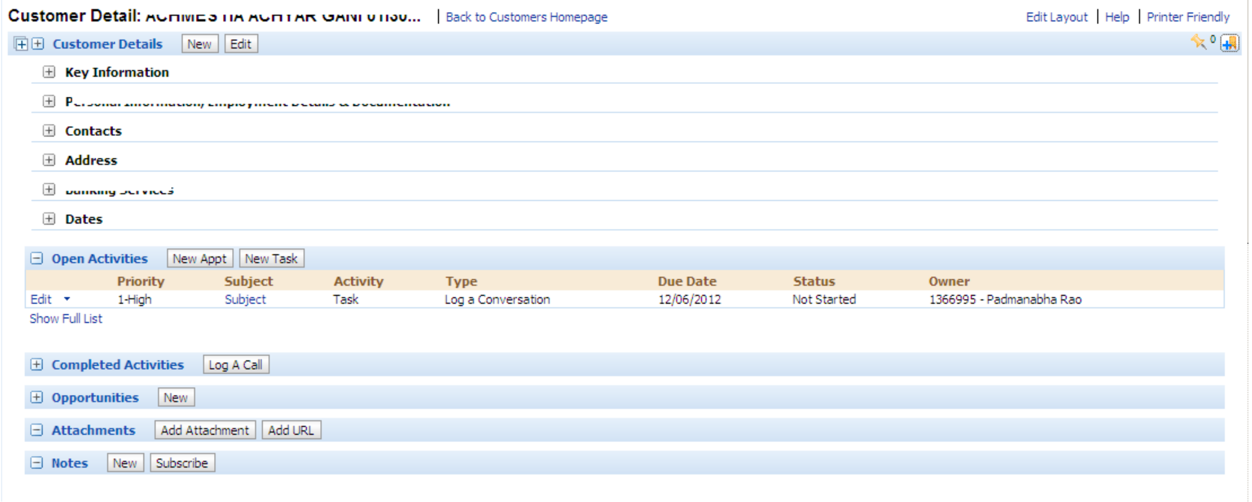
Life Sciences Management

CRM On Demand Offline Client for Life Sciences - Download install software that allo
Sciences offline client to enable key customer management, call reporting and Persor
offline.

Smart Call Management - Update and Delete Smart Call Templates.

Modification Tracking - Modification Tracking

Enable Modification Workflows - Enable Modification Workflows



Customer Detail: [illegible] | Back to Customers Homepage

Customer Details New Edit

- Key Information
- Personal Information, Employment Details & Documentation
- Contacts
- Address
- Banking Services
- Dates

Open Activities New Appt New Task

	Priority	Subject	Activity	Type	Due Date	Status	Owner
Edit ▾	1-High	Subject	Task	Log a Conversation	12/06/2012	Not Started	1366995 - Padmanabha Rao

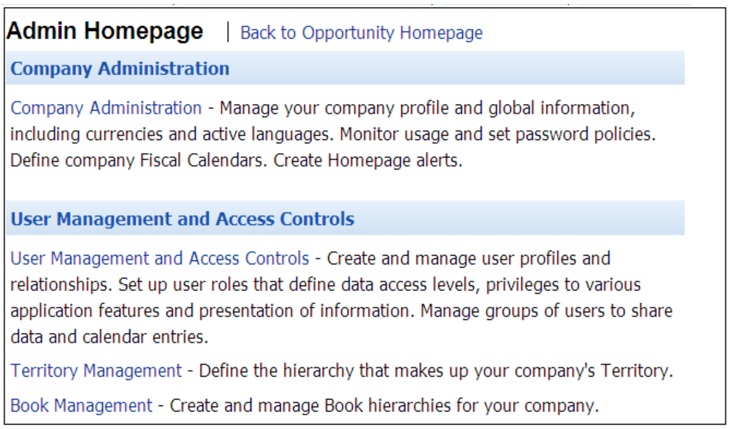
Show Full List

Completed Activities Log A Call

Opportunities New

Attachments Add Attachment Add URL

Notes New Subscribe



Admin Homepage | Back to Opportunity Homepage

Company Administration

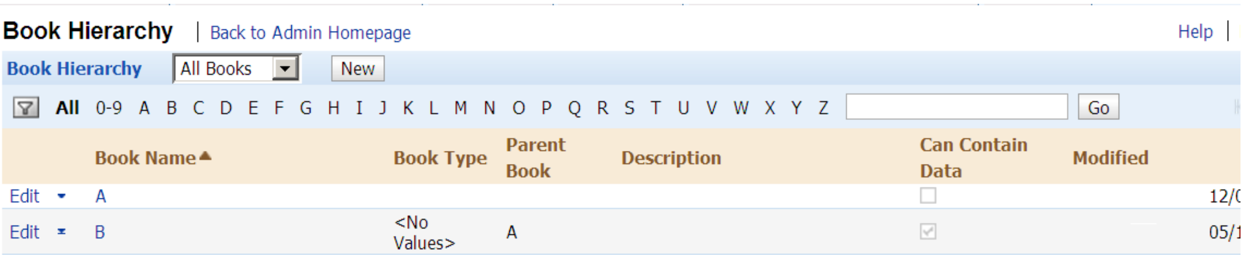
Company Administration - Manage your company profile and global information, including currencies and active languages. Monitor usage and set password policies. Define company Fiscal Calendars. Create Homepage alerts.

User Management and Access Controls

User Management and Access Controls - Create and manage user profiles and relationships. Set up user roles that define data access levels, privileges to various application features and presentation of information. Manage groups of users to share data and calendar entries.

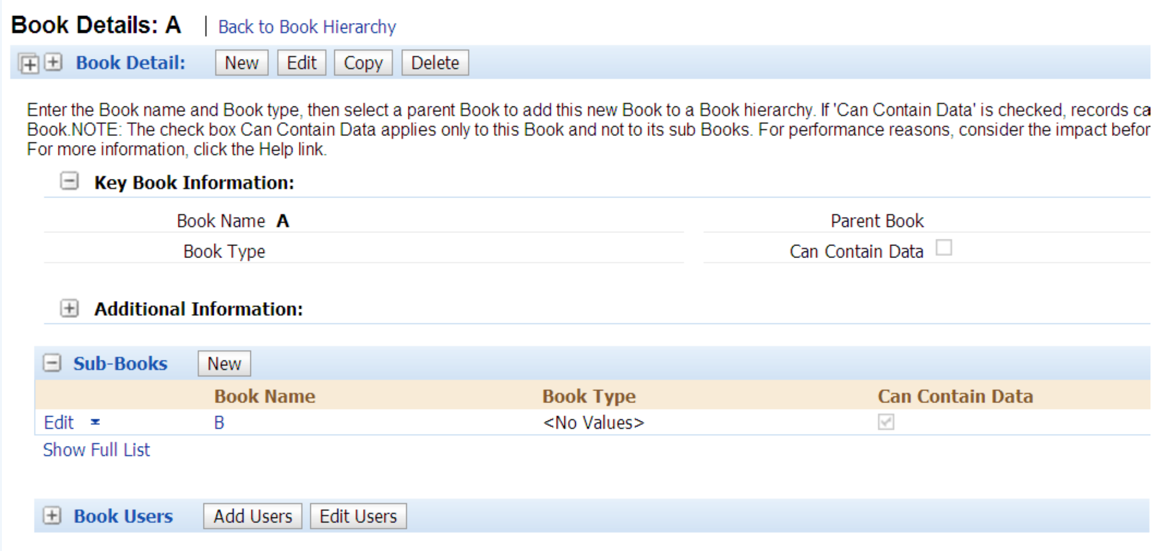
Territory Management - Define the hierarchy that makes up your company's Territory.

Book Management - Create and manage Book hierarchies for your company.



Book Hierarchy | Back to Admin Homepage

	Book Name	Book Type	Parent Book	Description	Can Contain Data	Modified
Edit	A				☐	12/(
Edit	B	<No Values>	A		☑	05/1



Book Details: A | Back to Book Hierarchy

Enter the Book name and Book type, then select a parent Book to add this new Book to a Book hierarchy. If 'Can Contain Data' is checked, records ca Book.NOTE: The check box Can Contain Data applies only to this Book and not to its sub Books. For performance reasons, consider the impact befor For more information, click the Help link.

Key Book Information:

Book Name **A**

Parent Book

Book Type

Can Contain Data ☐

Additional Information:

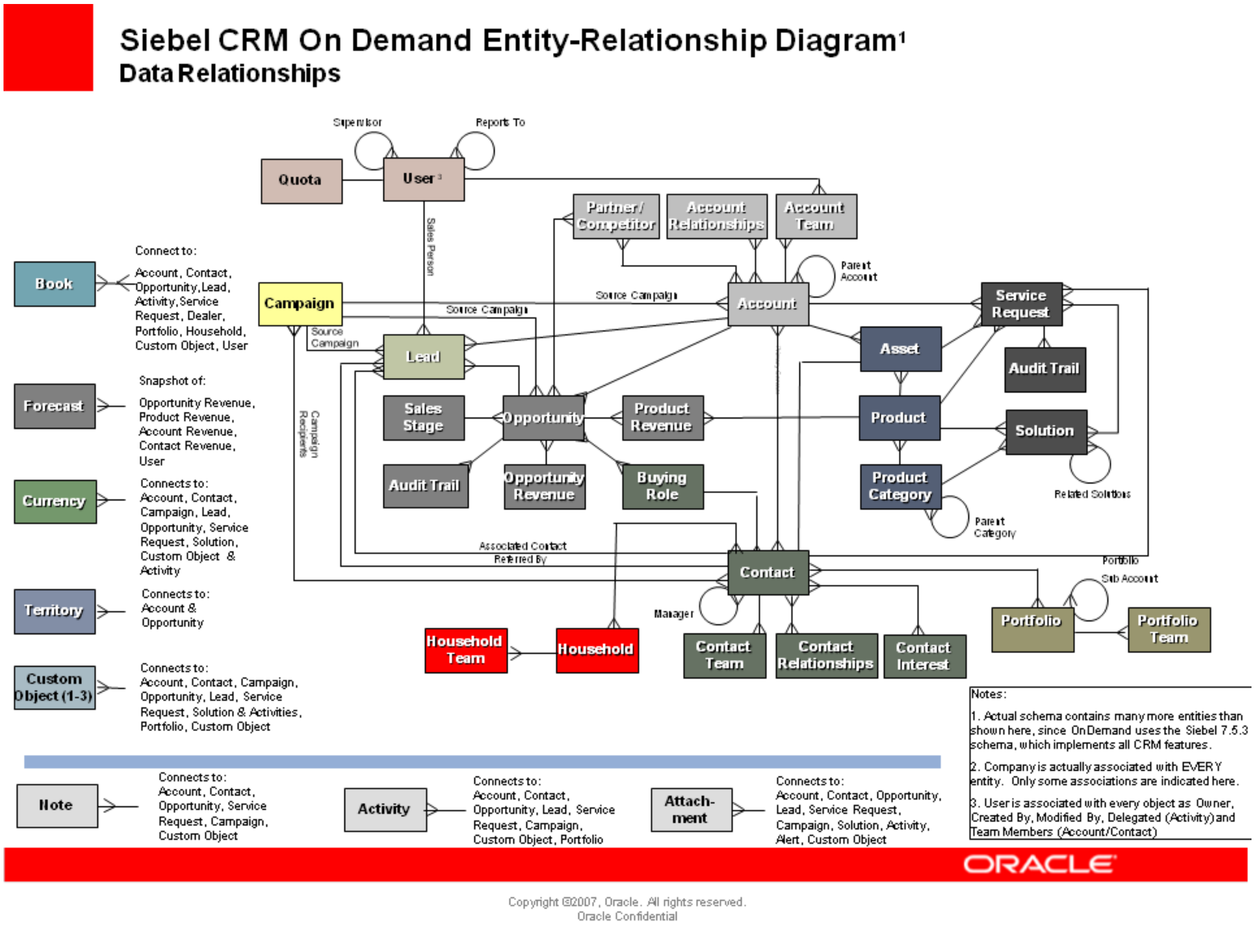
Sub-Books

	Book Name	Book Type	Can Contain Data
Edit	B	<No Values>	☑

Show Full List

Book Users

Chapter 05 Images



Siebel CRM On Demand Entity-Relationship Diagram[1]

Data Relationships

Connect to:

Account, Contact, Opportunity, Lead, Activity, Service Request, Dealer, Portfolio, Household, Custom Object, User

Snapshot of:

Opportunity Revenue, Product Revenue, Account Revenue, Contact Revenue, User

Connects to:
Account, Contact, Campaign, Lead, Opportunity, Service Request, Solution, Custom Object & Activity

Connects to:
Account & Opportunity

Connects to:
Account, Contact, Campaign, Opportunity, Lead, Service Request, Solution & Activities, Portfolio, Custom Object

Connects to:
Account, Contact, Opportunity, Service Request, Campaign, Custom Object

Connects to:
Account, Contact, Opportunity, Lead, Service Request, Campaign, Custom Object, Portfolio

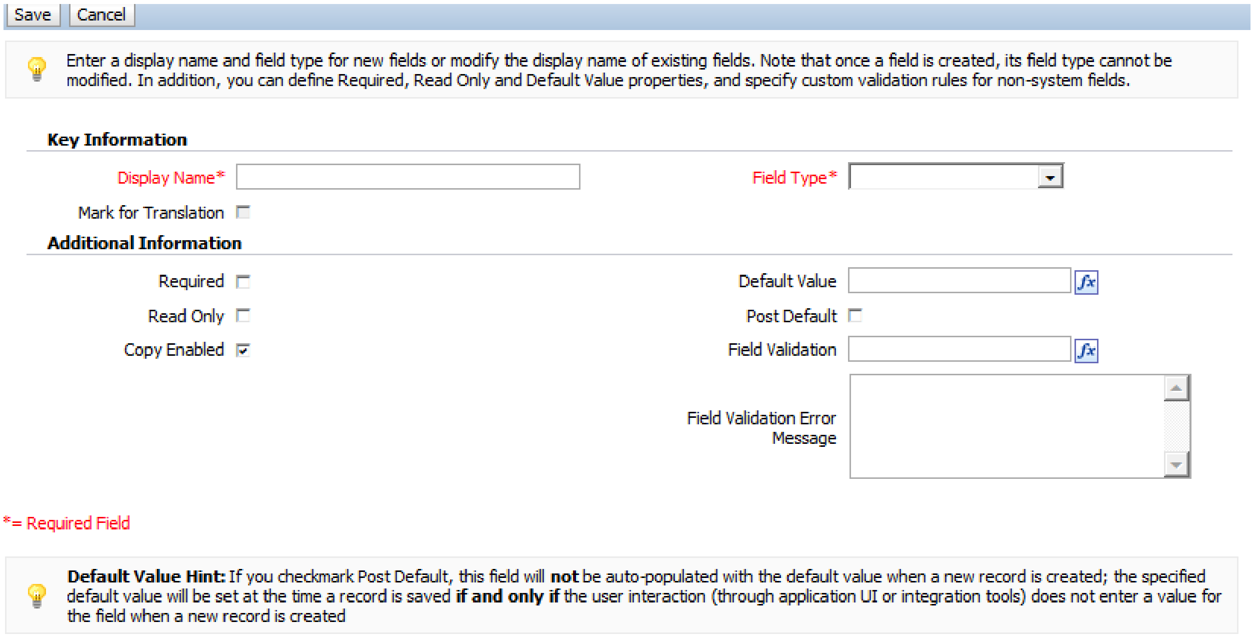
Connects to:
Account, Contact, Opportunity, Lead, Service Request, Campaign, Solution, Activity, Alert, Custom Object

Notes:

1. Actual schema contains many more entities than shown here, since OnDemand uses the Siebel 7.5.3 schema, which implements all CRM features.

2. Company is actually associated with EVERY entity. Only some associations are indicated here.

3. User is associated with every object as Owner, Created By, Modified By, Delegated (Activity) and Team Members (Account/Contact)



Enter a display name and field type for new fields or modify the display name of existing fields. Note that once a field is created, its field type cannot be modified. In addition, you can define Required, Read Only and Default Value properties, and specify custom validation rules for non-system fields.

Key Information

Display Name*

Field Type*

Mark for Translation ☐

Additional Information

Required ☐

Read Only ☐

Copy Enabled ☑

Default Value

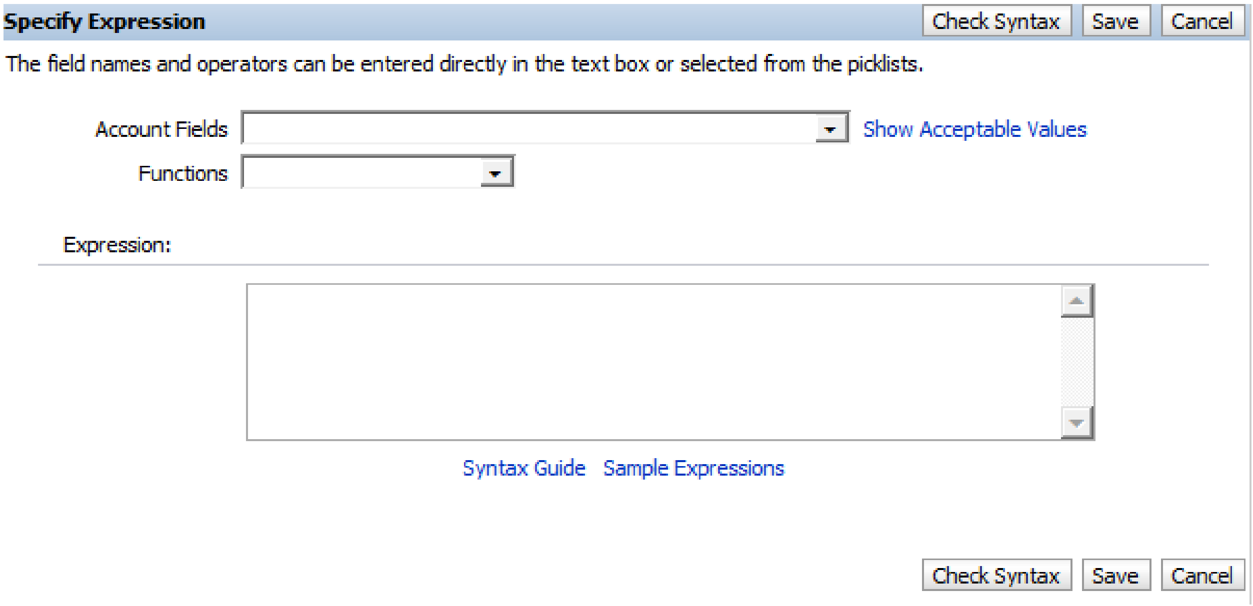
Post Default ☐

Field Validation

Field Validation Error Message

*= Required Field

Default Value Hint: If you checkmark Post Default, this field will **not** be auto-populated with the default value when a new record is created; the specified default value will be set at the time a record is saved **if and only if** the user interaction (through application UI or integration tools) does not enter a value for the field when a new record is created

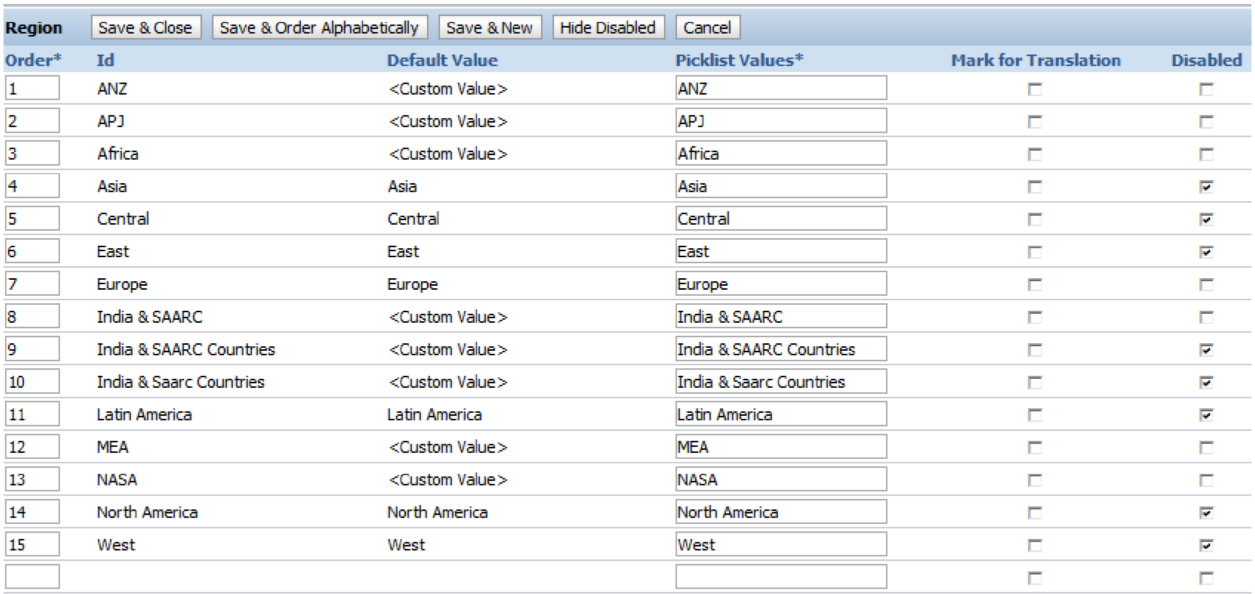


The field names and operators can be entered directly in the text box or selected from the picklists.

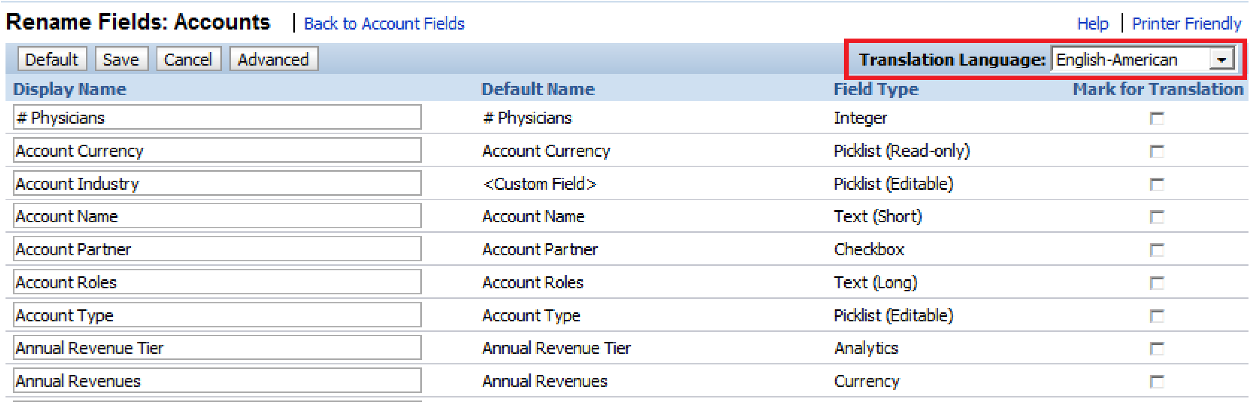
Account Fields

Functions

Expression:

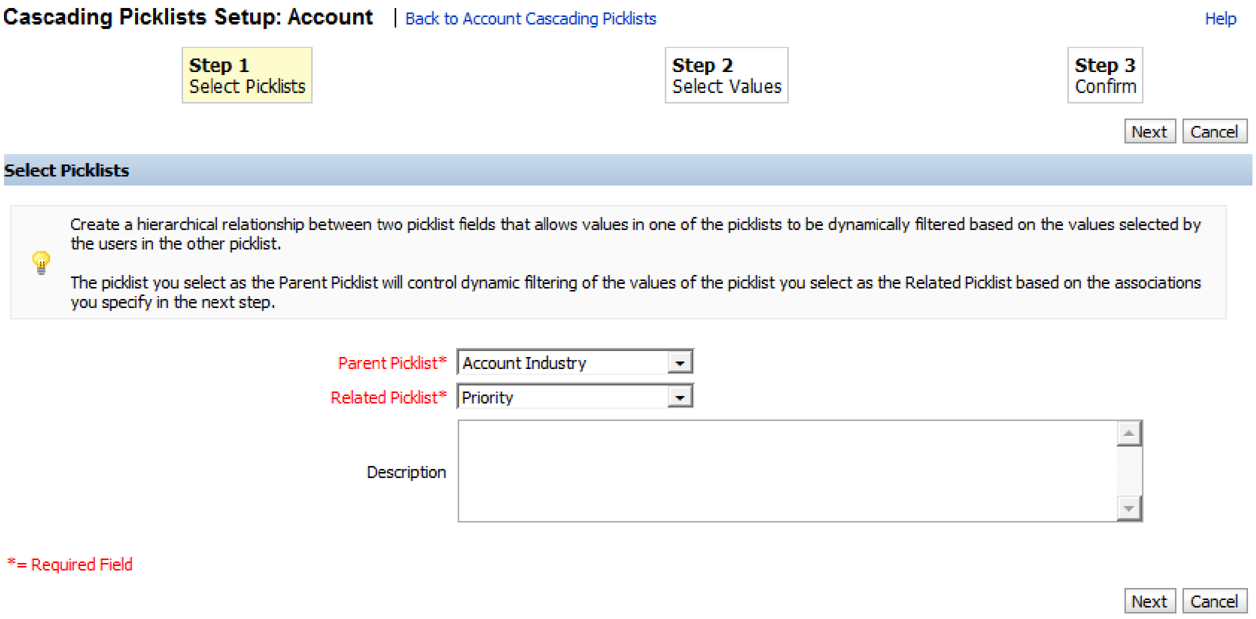


Order*	Id	Default Value	Picklist Values*	Mark for Translation	Disabled
1	ANZ	<Custom Value>	ANZ	☐	☐
2	APJ	<Custom Value>	APJ	☐	☐
3	Africa	<Custom Value>	Africa	☐	☐
4	Asia	Asia	Asia	☐	☑
5	Central	Central	Central	☐	☑
6	East	East	East	☐	☑
7	Europe	Europe	Europe	☐	☐
8	India & SAARC	<Custom Value>	India & SAARC	☐	☐
9	India & SAARC Countries	<Custom Value>	India & SAARC Countries	☐	☑
10	India & Saarc Countries	<Custom Value>	India & Saarc Countries	☐	☑
11	Latin America	Latin America	Latin America	☐	☑
12	MEA	<Custom Value>	MEA	☐	☐
13	NASA	<Custom Value>	NASA	☐	☐
14	North America	North America	North America	☐	☑
15	West	West	West	☐	☑
				☐	☐



Translation Language: English-American

Display Name	Default Name	Field Type	Mark for Translation
# Physicians	# Physicians	Integer	☐
Account Currency	Account Currency	Picklist (Read-only)	☐
Account Industry	<Custom Field>	Picklist (Editable)	☐
Account Name	Account Name	Text (Short)	☐
Account Partner	Account Partner	Checkbox	☐
Account Roles	Account Roles	Text (Long)	☐
Account Type	Account Type	Picklist (Editable)	☐
Annual Revenue Tier	Annual Revenue Tier	Analytics	☐
Annual Revenues	Annual Revenues	Currency	☐



Cascading Picklists Setup: Account

Select Picklists

Create a hierarchical relationship between two picklist fields that allows values in one of the picklists to be dynamically filtered based on the values selected by the users in the other picklist.

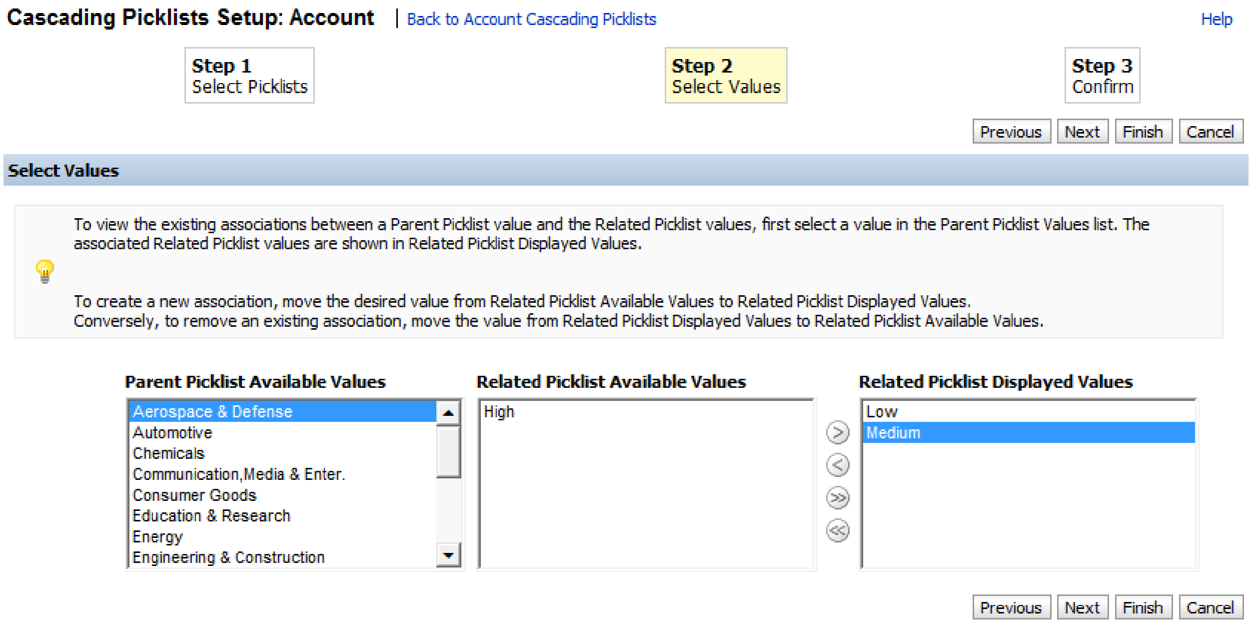
The picklist you select as the Parent Picklist will control dynamic filtering of the values of the picklist you select as the Related Picklist based on the associations you specify in the next step.

Parent Picklist* Account Industry

Related Picklist* Priority

Description

*= Required Field



Cascading Picklists Setup: Account

Select Values

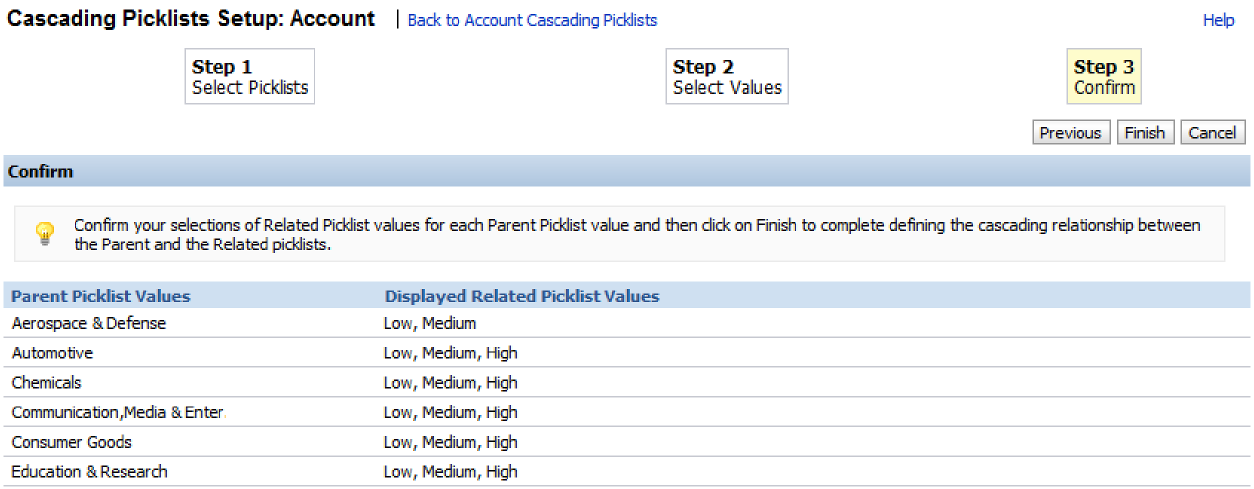
To view the existing associations between a Parent Picklist value and the Related Picklist values, first select a value in the Parent Picklist Values list. The associated Related Picklist values are shown in Related Picklist Displayed Values.

To create a new association, move the desired value from Related Picklist Available Values to Related Picklist Displayed Values.
Conversely, to remove an existing association, move the value from Related Picklist Displayed Values to Related Picklist Available Values.

Parent Picklist Available Values
- Aerospace & Defense
- Automotive
- Chemicals
- Communication,Media & Enter.
- Consumer Goods
- Education & Research
- Energy
- Engineering & Construction

Related Picklist Available Values
- High

Related Picklist Displayed Values
- Low
- Medium

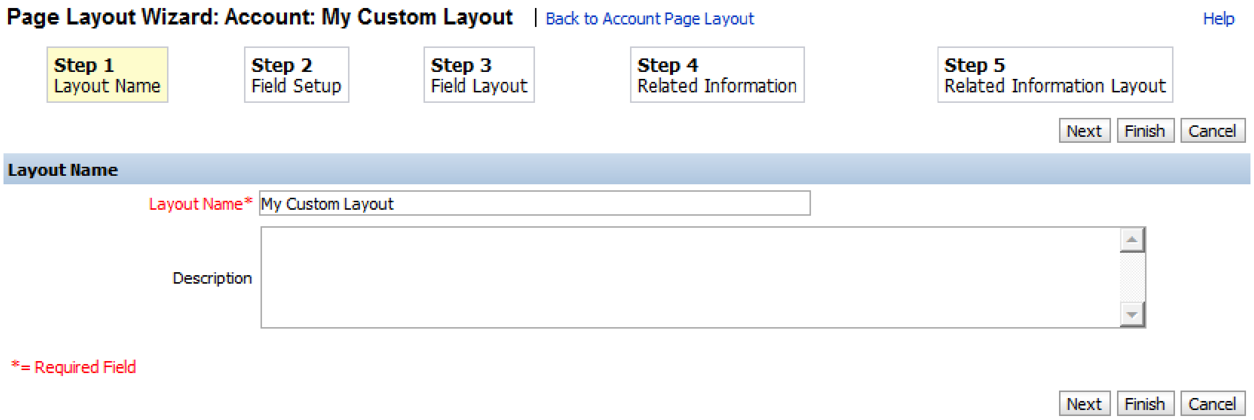


Cascading Picklists Setup: Account

Confirm

Confirm your selections of Related Picklist values for each Parent Picklist value and then click on Finish to complete defining the cascading relationship between the Parent and the Related picklists.

Parent Picklist Values	Displayed Related Picklist Values
Aerospace & Defense	Low, Medium
Automotive	Low, Medium, High
Chemicals	Low, Medium, High
Communication,Media & Enter	Low, Medium, High
Consumer Goods	Low, Medium, High
Education & Research	Low, Medium, High



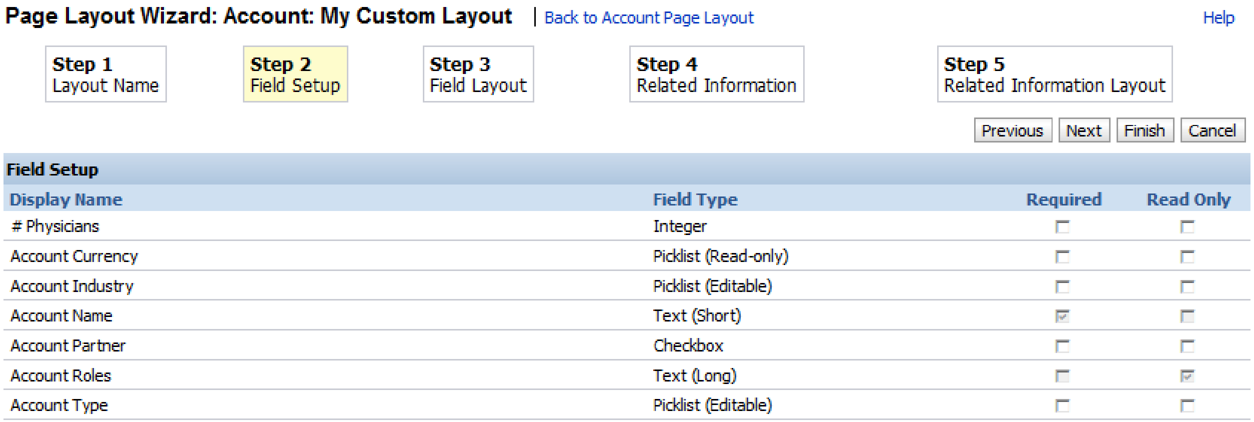
Page Layout Wizard: Account: My Custom Layout

Layout Name

Layout Name* My Custom Layout

Description

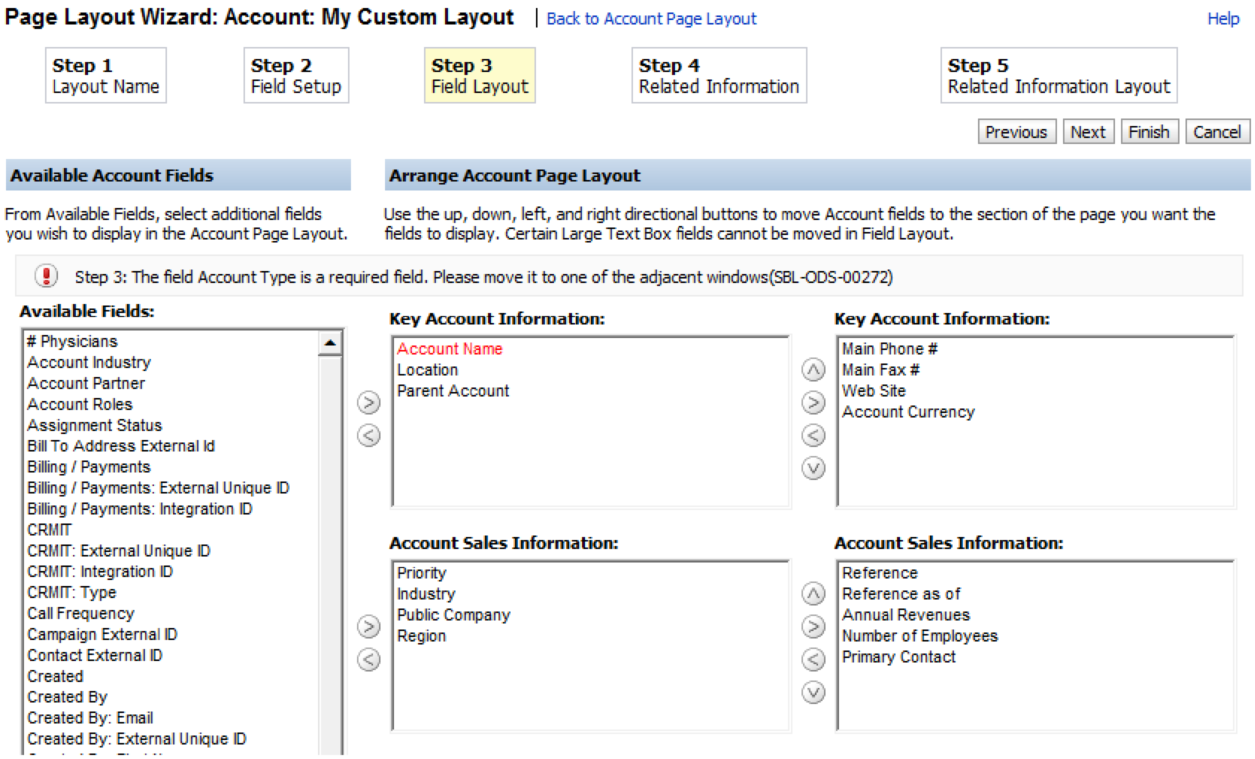
*= Required Field



Page Layout Wizard: Account: My Custom Layout

Field Setup

Display Name	Field Type	Required	Read Only
# Physicians	Integer	☐	☐
Account Currency	Picklist (Read-only)	☐	☐
Account Industry	Picklist (Editable)	☐	☐
Account Name	Text (Short)	☑	☐
Account Partner	Checkbox	☐	☐
Account Roles	Text (Long)	☐	☑
Account Type	Picklist (Editable)	☐	☐



Page Layout Wizard: Account: My Custom Layout | Back to Account Page Layout

Available Account Fields

From Available Fields, select additional fields you wish to display in the Account Page Layout.

Arrange Account Page Layout

Use the up, down, left, and right directional buttons to move Account fields to the section of the page you want the fields to display. Certain Large Text Box fields cannot be moved in Field Layout.

Step 3: The field Account Type is a required field. Please move it to one of the adjacent windows(SBL-ODS-00272)

Available Fields:

- # Physicians
- Account Industry
- Account Partner
- Account Roles
- Assignment Status
- Bill To Address External Id
- Billing / Payments
- Billing / Payments: External Unique ID
- Billing / Payments: Integration ID
- CRMIT
- CRMIT: External Unique ID
- CRMIT: Integration ID
- CRMIT: Type
- Call Frequency
- Campaign External ID
- Contact External ID
- Created
- Created By
- Created By: Email
- Created By: External Unique ID

Key Account Information:

- Account Name
- Location
- Parent Account

Key Account Information:

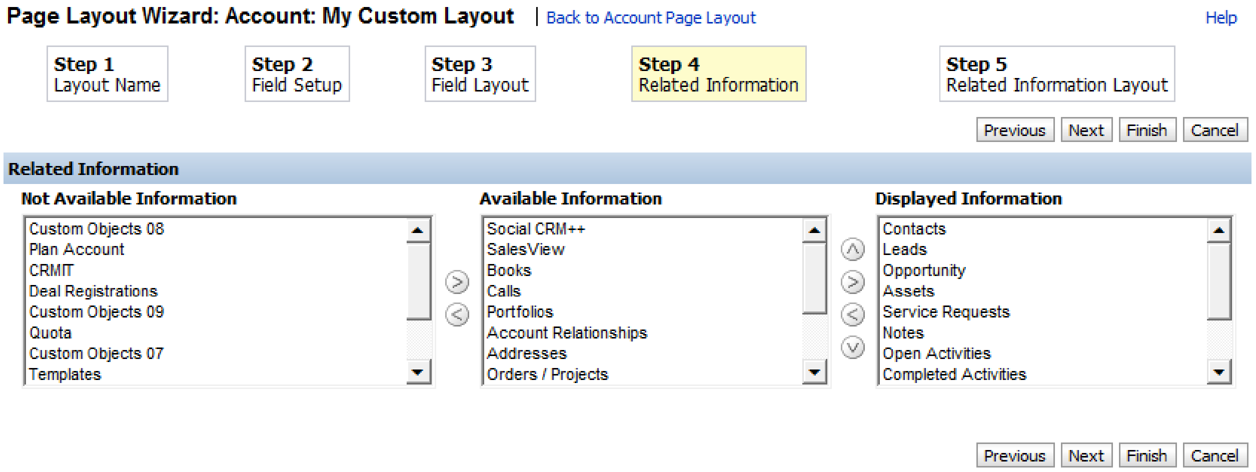
- Main Phone #
- Main Fax #
- Web Site
- Account Currency

Account Sales Information:

- Priority
- Industry
- Public Company
- Region

Account Sales Information:

- Reference
- Reference as of
- Annual Revenues
- Number of Employees
- Primary Contact



Page Layout Wizard: Account: My Custom Layout | Back to Account Page Layout

Related Information

Not Available Information

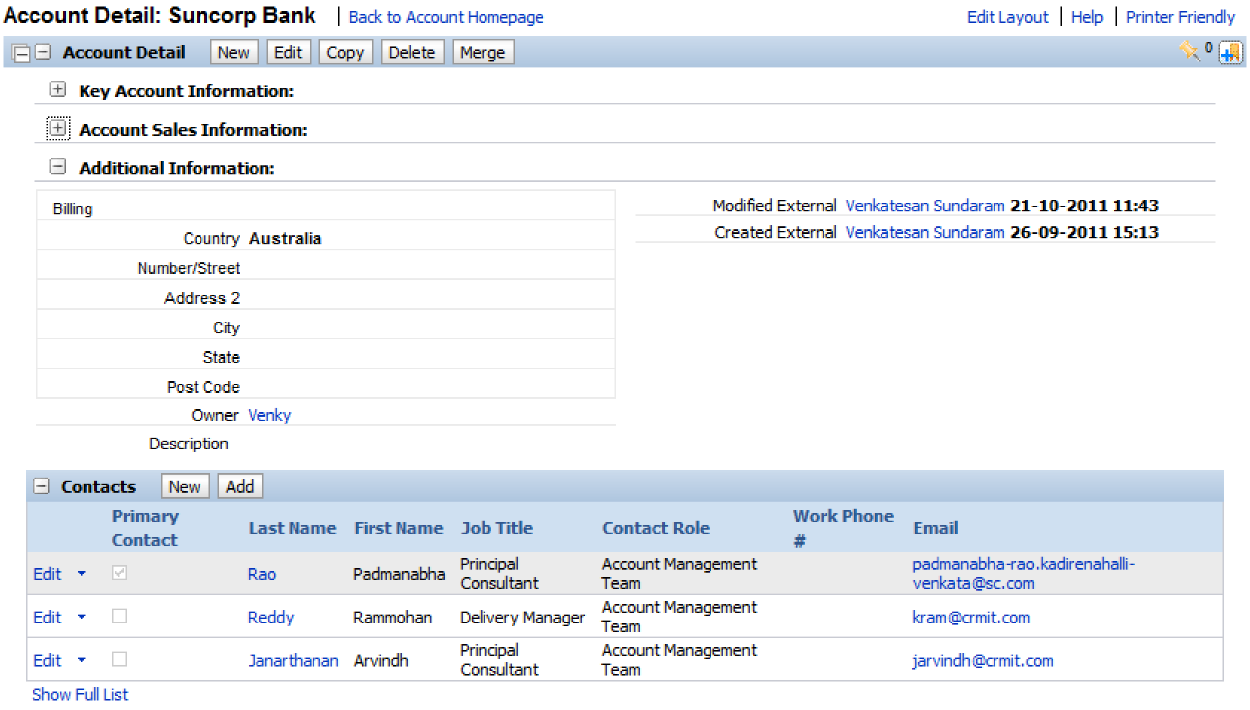
- Custom Objects 08
- Plan Account
- CRMIT
- Deal Registrations
- Custom Objects 09
- Quota
- Custom Objects 07
- Templates

Available Information

- Social CRM++
- SalesView
- Books
- Calls
- Portfolios
- Account Relationships
- Addresses
- Orders / Projects

Displayed Information

- Contacts
- Leads
- Opportunity
- Assets
- Service Requests
- Notes
- Open Activities
- Completed Activities



Account Detail: Suncorp Bank

Key Account Information:

Account Sales Information:

Additional Information:

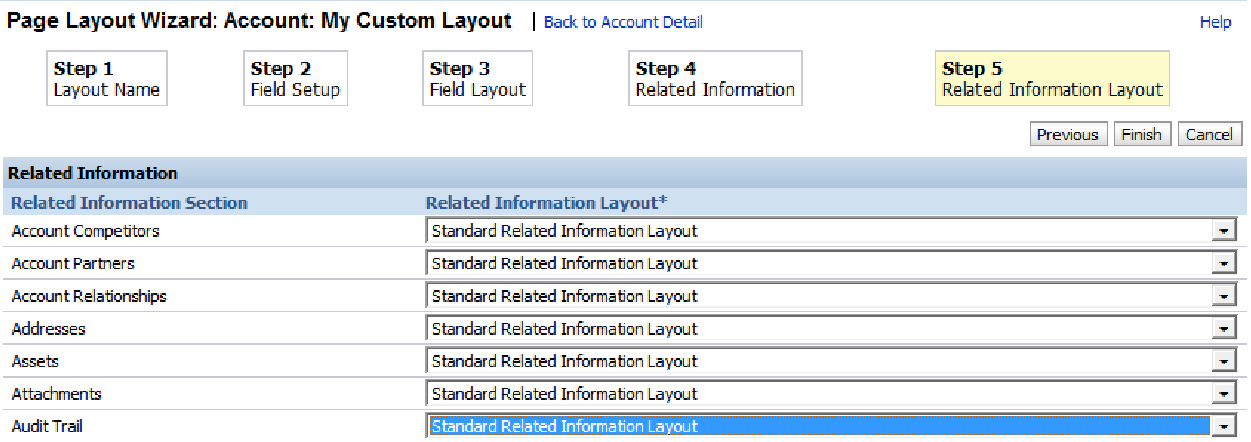
Billing

Country	**Australia**
Number/Street	
Address 2	
City	
State	
Post Code	
Owner	Venky
Description	

Modified External	Venkatesan Sundaram	**21-10-2011 11:43**
Created External	Venkatesan Sundaram	**26-09-2011 15:13**

Contacts

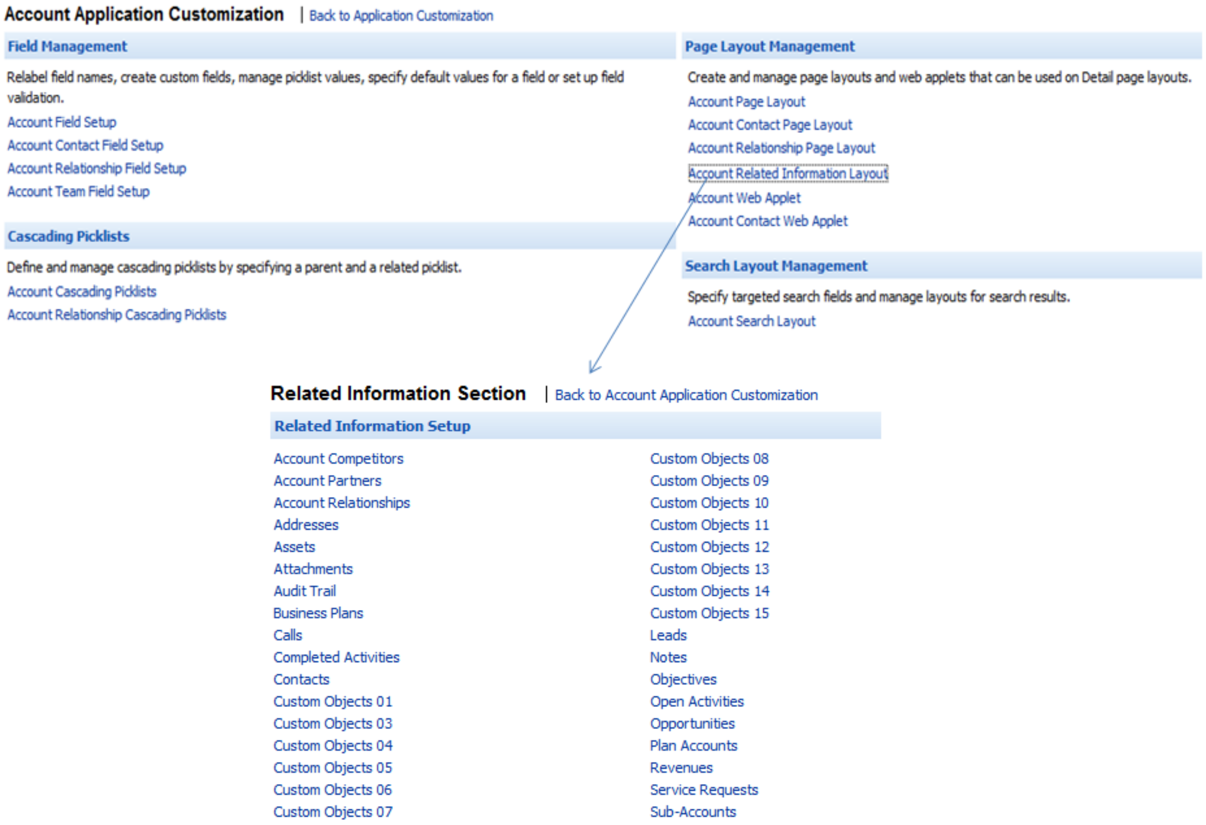
	Primary Contact	Last Name	First Name	Job Title	Contact Role	Work Phone #	Email
Edit ▾	☑	Rao	Padmanabha	Principal Consultant	Account Management Team		padmanabha-rao.kadirenahalli-venkata@sc.com
Edit ▾	☐	Reddy	Rammohan	Delivery Manager	Account Management Team		kram@crmit.com
Edit ▾	☐	Janarthanan	Arvindh	Principal Consultant	Account Management Team		jarvindh@crmit.com



Page Layout Wizard: Account: My Custom Layout

Related Information

Related Information Section	Related Information Layout*
Account Competitors	Standard Related Information Layout
Account Partners	Standard Related Information Layout
Account Relationships	Standard Related Information Layout
Addresses	Standard Related Information Layout
Assets	Standard Related Information Layout
Attachments	Standard Related Information Layout
Audit Trail	Standard Related Information Layout



Account Application Customization | Back to Application Customization

Field Management

Relabel field names, create custom fields, manage picklist values, specify default values for a field or set up field validation.

Cascading Picklists

Define and manage cascading picklists by specifying a parent and a related picklist.

Page Layout Management

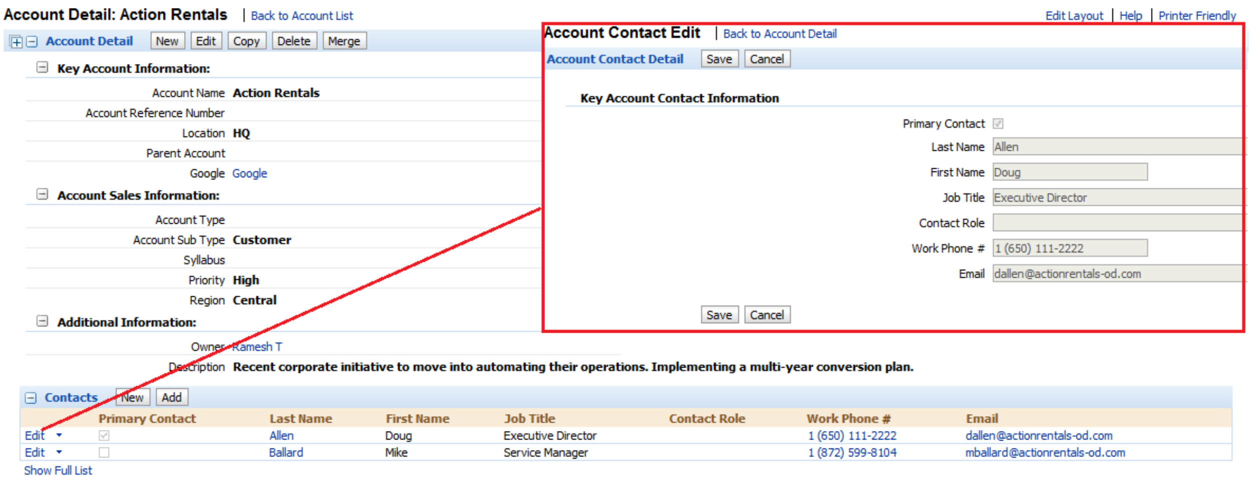
Create and manage page layouts and web applets that can be used on Detail page layouts.

Search Layout Management

Specify targeted search fields and manage layouts for search results.

Related Information Section | Back to Account Application Customization

Related Information Setup



Account Detail: Action Rentals | Back to Account List

Key Account Information:

Account Name **Action Rentals**
Account Reference Number
Location **HQ**
Parent Account
Google Google

Account Sales Information:

Account Type
Account Sub Type **Customer**
Syllabus
Priority **High**
Region **Central**

Additional Information:

Owner Ramesh T
Description **Recent corporate initiative to move into automating their operations. Implementing a multi-year conversion plan.**

Contacts

	Primary Contact	Last Name	First Name	Job Title	Contact Role	Work Phone #	Email
Edit ▾	☑	Allen	Doug	Executive Director		1 (650) 111-2222	dallen@actionrentals-od.com
Edit ▾	☐	Ballard	Mike	Service Manager		1 (872) 599-8104	mballard@actionrentals-od.com

Account Contact Edit | Back to Account Detail

Key Account Contact Information

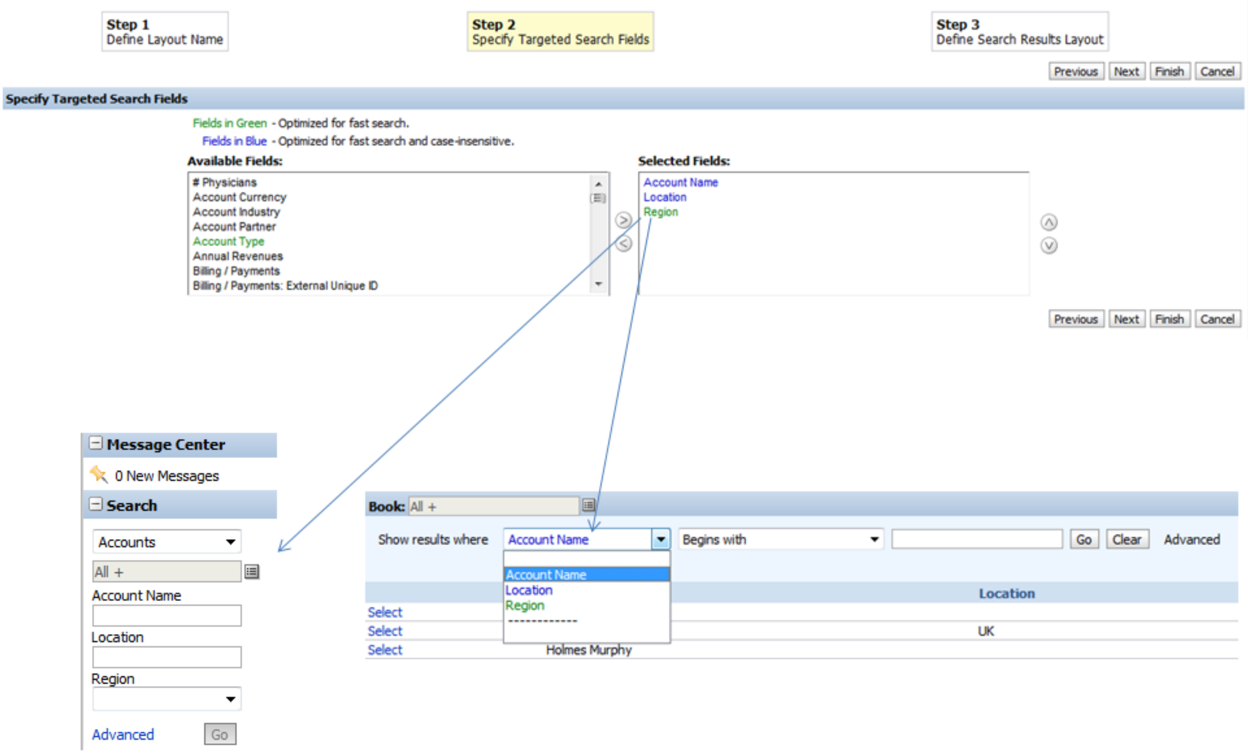
Primary Contact ☑
Last Name Allen
First Name Doug
Job Title Executive Director
Contact Role
Work Phone # 1 (650) 111-2222
Email dallen@actionrentals-od.com

Dynamic Layout Wizard: Account: Account Dyna... | Back to Account Dynamic Layout

Assign Layouts

Associate each of the picklist values with a layout name; the layout you pick will be displayed when a record has the corresponding picklist value.

Field Type	Layout Name*
Competitor	Competitor – Account Layout
Customer	Customer – Account Layout
Partner	Partner – Account Layout
Prospect	Account Page Standard Layout
Oracle	Account Page Standard Layout



Specify Targeted Search Fields

Fields in Green - Optimized for fast search.

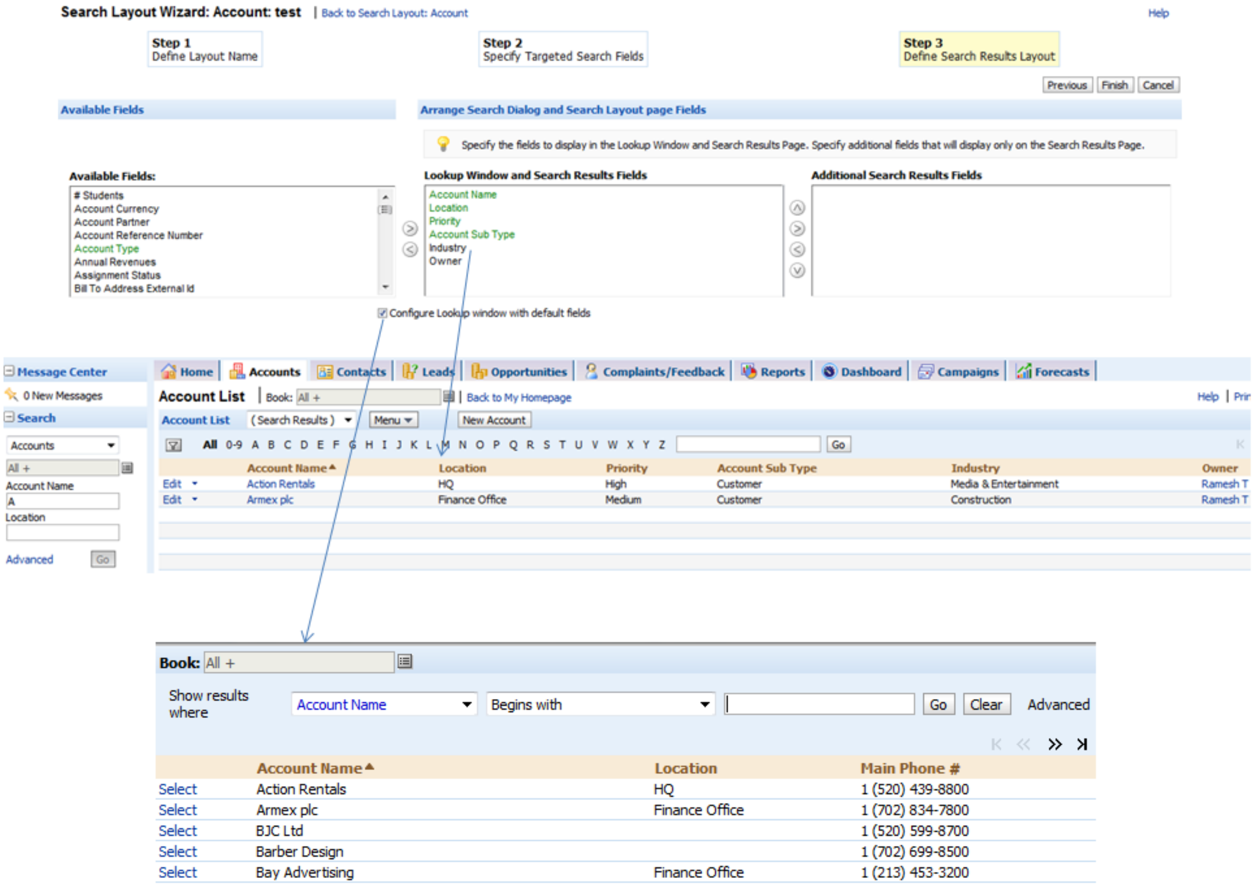
Fields in Blue - Optimized for fast search and case-insensitive.

Available Fields:

- # Physicians
- Account Currency
- Account Industry
- Account Partner
- Account Type
- Annual Revenues
- Billing / Payments
- Billing / Payments: External Unique ID

Selected Fields:

- Account Name
- Location
- Region



Specify the fields to display in the Lookup Window and Search Results Page. Specify additional fields that will display only on the Search Results Page.

Available Fields:
- # Students
- Account Currency
- Account Partner
- Account Reference Number
- Account Type
- Annual Revenues
- Assignment Status
- Bill To Address External Id

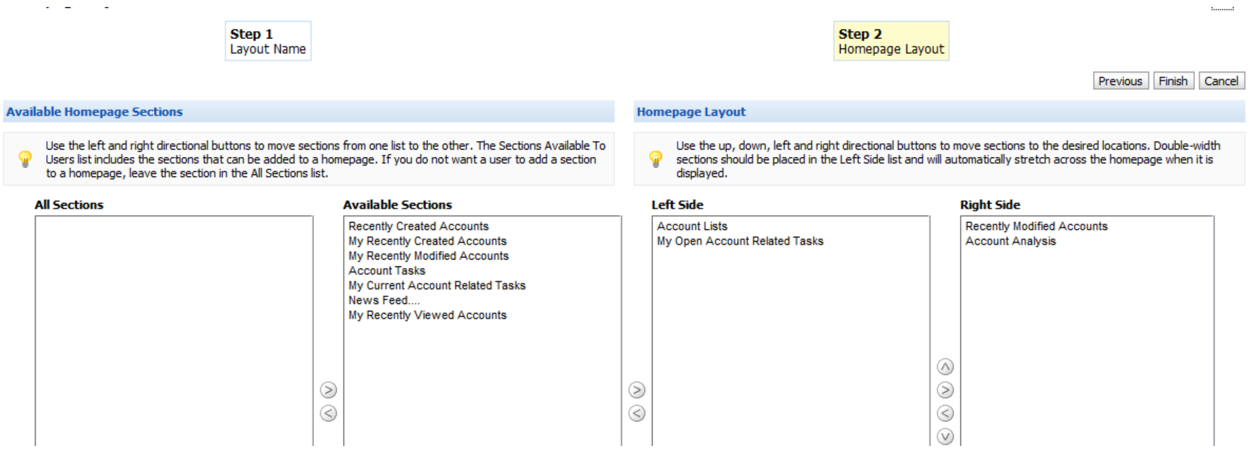
Lookup Window and Search Results Fields
- Account Name
- Location
- Priority
- Account Sub Type
- Industry
- Owner

Additional Search Results Fields

☑ Configure Lookup window with default fields

	Account Name	Location	Priority	Account Sub Type	Industry	Owner
Edit	Action Rentals	HQ	High	Customer	Media & Entertainment	Ramesh T
Edit	Armex plc	Finance Office	Medium	Customer	Construction	Ramesh T

	Account Name	Location	Main Phone #
Select	Action Rentals	HQ	1 (520) 439-8800
Select	Armex plc	Finance Office	1 (702) 834-7800
Select	BJC Ltd		1 (520) 599-8700
Select	Barber Design		1 (702) 699-8500
Select	Bay Advertising	Finance Office	1 (213) 453-3200



Use the left and right directional buttons to move sections from one list to the other. The Sections Available To Users list includes the sections that can be added to a homepage. If you do not want a user to add a section to a homepage, leave the section in the All Sections list.

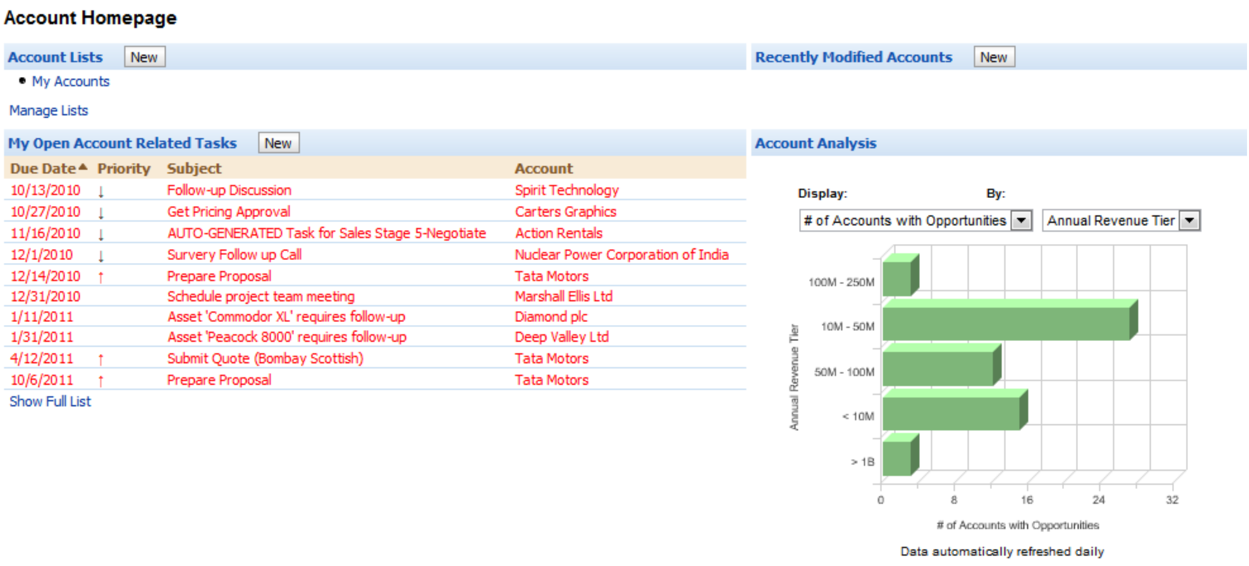
Use the up, down, left and right directional buttons to move sections to the desired locations. Double-width sections should be placed in the Left Side list and will automatically stretch across the homepage when it is displayed.

All Sections

Available Sections
- Recently Created Accounts
- My Recently Created Accounts
- My Recently Modified Accounts
- Account Tasks
- My Current Account Related Tasks
- News Feed....
- My Recently Viewed Accounts

Left Side
- Account Lists
- My Open Account Related Tasks

Right Side
- Recently Modified Accounts
- Account Analysis



Account Homepage

Account Lists New

- My Accounts

Manage Lists

Recently Modified Accounts New

My Open Account Related Tasks New

Due Date▲	Priority	Subject	Account
10/13/2010	↓	Follow-up Discussion	Spirit Technology
10/27/2010	↓	Get Pricing Approval	Carters Graphics
11/16/2010	↓	AUTO-GENERATED Task for Sales Stage 5-Negotiate	Action Rentals
12/1/2010	↓	Survery Follow up Call	Nuclear Power Corporation of India
12/14/2010	↑	Prepare Proposal	Tata Motors
12/31/2010		Schedule project team meeting	Marshall Ellis Ltd
1/11/2011		Asset 'Commodor XL' requires follow-up	Diamond plc
1/31/2011		Asset 'Peacock 8000' requires follow-up	Deep Valley Ltd
4/12/2011	↑	Submit Quote (Bombay Scottish)	Tata Motors
10/6/2011	↑	Prepare Proposal	Tata Motors

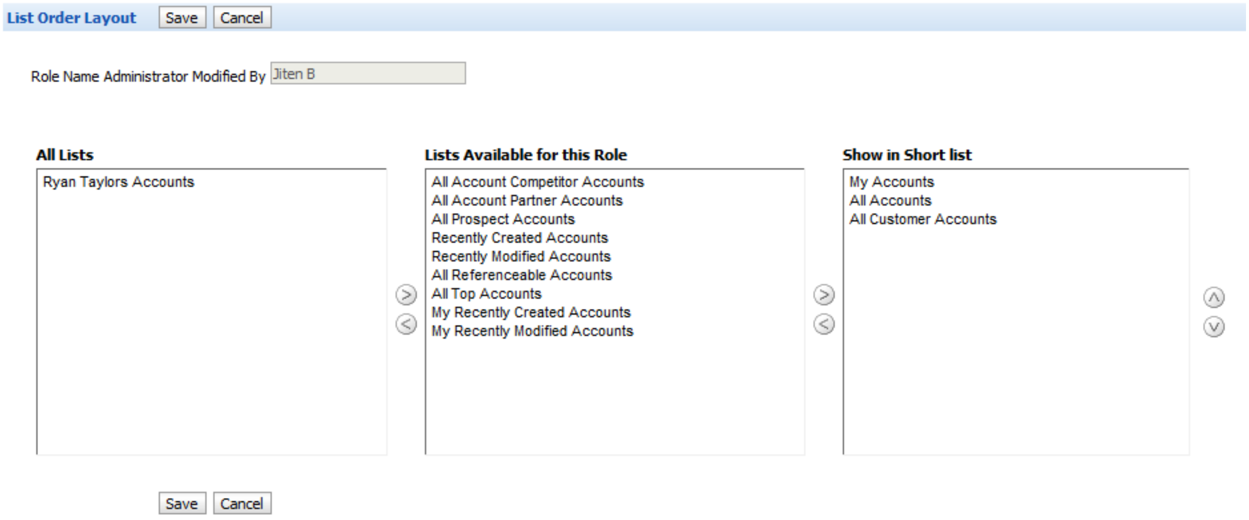
Show Full List

Account Analysis

Display: # of Accounts with Opportunities

By: Annual Revenue Tier

Data automatically refreshed daily

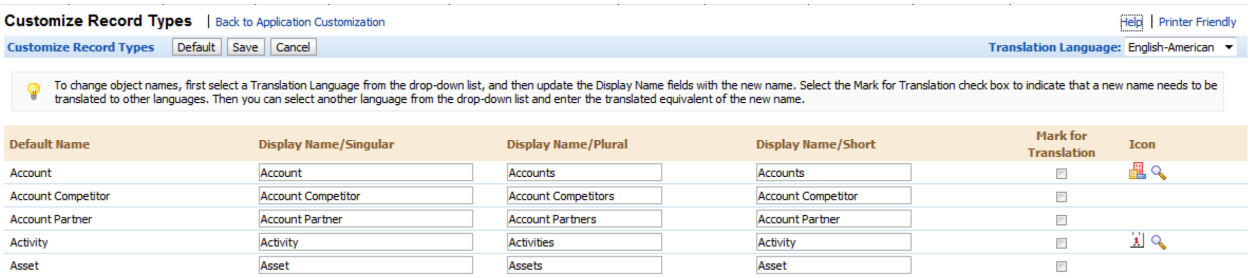


List Order Layout Save Cancel

Role Name Administrator Modified By Jiten B

All Lists	Lists Available for this Role	Show in Short list
Ryan Taylors Accounts	All Account Competitor Accounts All Account Partner Accounts All Prospect Accounts Recently Created Accounts Recently Modified Accounts All Referenceable Accounts All Top Accounts My Recently Created Accounts My Recently Modified Accounts	My Accounts All Accounts All Customer Accounts

Save Cancel



Customize Record Types | Back to Application Customization

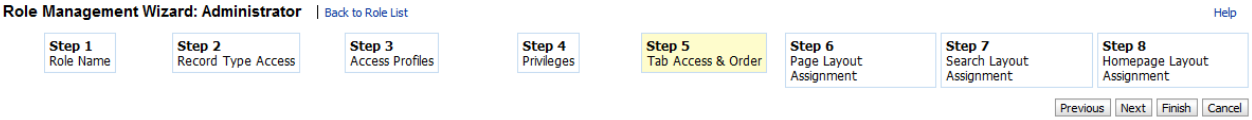
Help | Printer Friendly

Customize Record Types Default Save Cancel

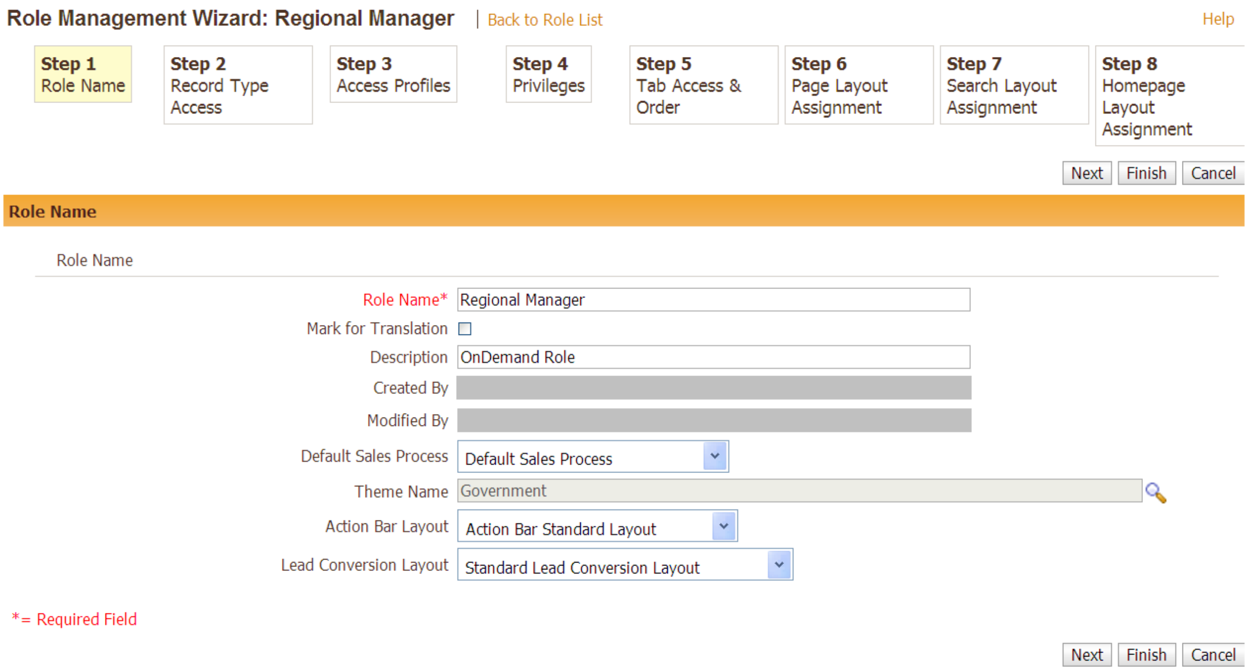
Translation Language: English-American

To change object names, first select a Translation Language from the drop-down list, and then update the Display Name fields with the new name. Select the Mark for Translation check box to indicate that a new name needs to be translated to other languages. Then you can select another language from the drop-down list and enter the translated equivalent of the new name.

Default Name	Display Name/Singular	Display Name/Plural	Display Name/Short	Mark for Translation	Icon
Account	Account	Accounts	Accounts	☐	
Account Competitor	Account Competitor	Account Competitors	Account Competitor	☐	
Account Partner	Account Partner	Account Partners	Account Partner	☐	
Activity	Activity	Activities	Activity	☐	
Asset	Asset	Assets	Asset	☐	

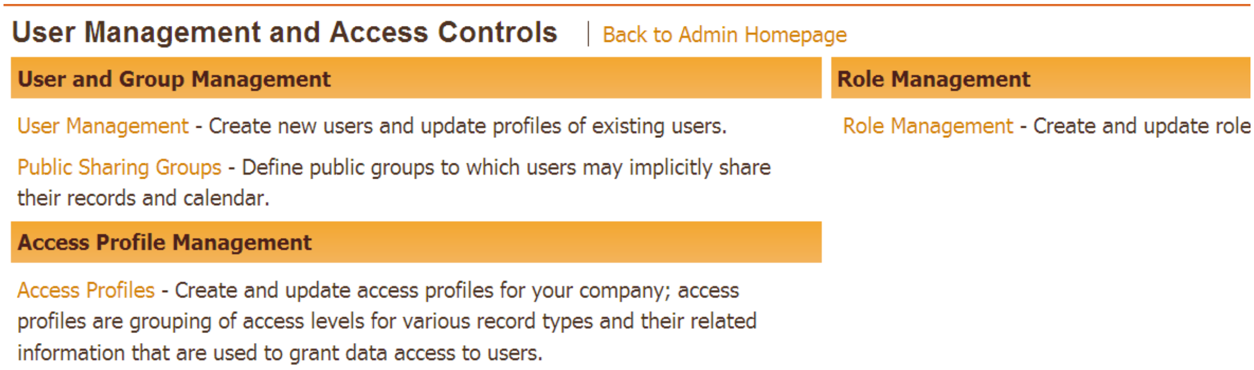


Chapter 5



Role Name* Regional Manager
Mark for Translation ☐
Description OnDemand Role
Created By
Modified By
Default Sales Process Default Sales Process
Theme Name Government
Action Bar Layout Action Bar Standard Layout
Lead Conversion Layout Standard Lead Conversion Layout

*= Required Field

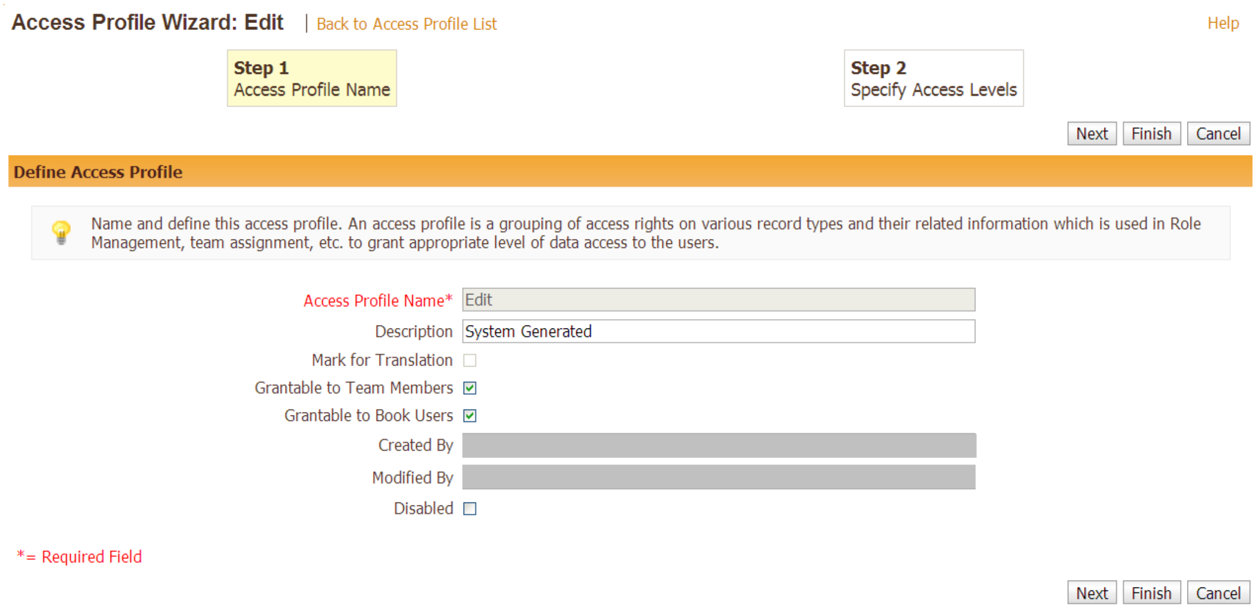


User Management - Create new users and update profiles of existing users.

Public Sharing Groups - Define public groups to which users may implicitly share their records and calendar.

Access Profiles - Create and update access profiles for your company; access profiles are grouping of access levels for various record types and their related information that are used to grant data access to users.

Role Management - Create and update role

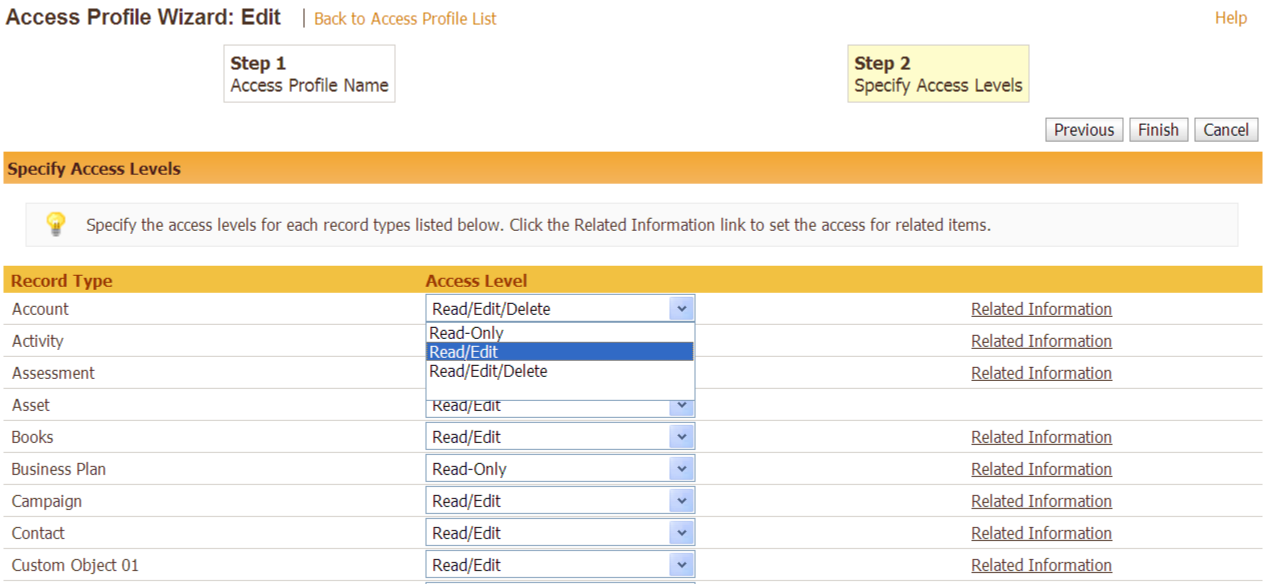


Define Access Profile

Name and define this access profile. An access profile is a grouping of access rights on various record types and their related information which is used in Role Management, team assignment, etc. to grant appropriate level of data access to the users.

Access Profile Name*	Edit
Description	System Generated
Mark for Translation	☐
Grantable to Team Members	☑
Grantable to Book Users	☑
Created By	
Modified By	
Disabled	☐

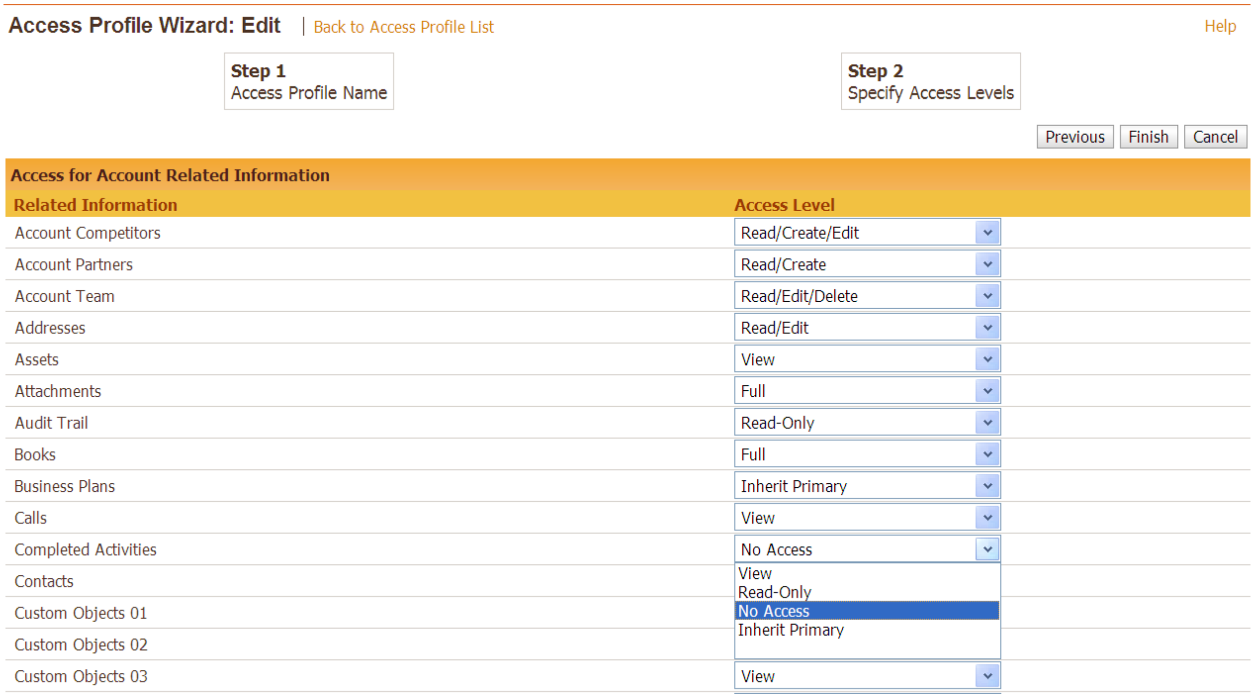
*= Required Field



Specify Access Levels

Specify the access levels for each record types listed below. Click the Related Information link to set the access for related items.

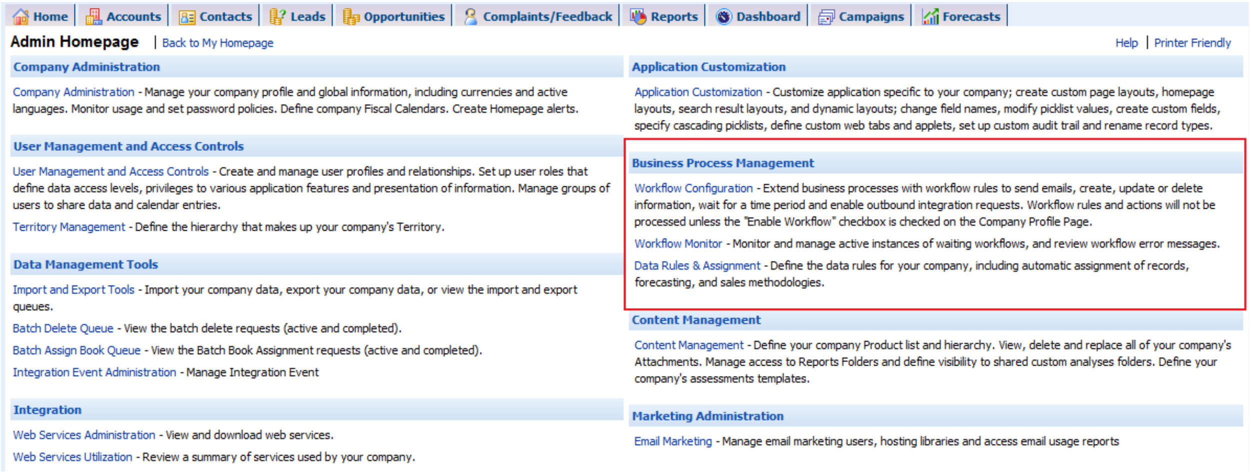
Record Type	Access Level	
Account	Read/Edit/Delete	Related Information
Activity		Related Information
Assessment		Related Information
Asset	Read/Edit	
Books	Read/Edit	Related Information
Business Plan	Read-Only	Related Information
Campaign	Read/Edit	Related Information
Contact	Read/Edit	Related Information
Custom Object 01	Read/Edit	Related Information



Access for Account Related Information

Related Information	Access Level
Account Competitors	Read/Create/Edit
Account Partners	Read/Create
Account Team	Read/Edit/Delete
Addresses	Read/Edit
Assets	View
Attachments	Full
Audit Trail	Read-Only
Books	Full
Business Plans	Inherit Primary
Calls	View
Completed Activities	No Access
Contacts	
Custom Objects 01	
Custom Objects 02	
Custom Objects 03	View

Chapter 06 Images



Admin Homepage

Company Administration

Company Administration - Manage your company profile and global information, including currencies and active languages. Monitor usage and set password policies. Define company Fiscal Calendars. Create Homepage alerts.

User Management and Access Controls

User Management and Access Controls - Create and manage user profiles and relationships. Set up user roles that define data access levels, privileges to various application features and presentation of information. Manage groups of users to share data and calendar entries.

Territory Management - Define the hierarchy that makes up your company's Territory.

Data Management Tools

Import and Export Tools - Import your company data, export your company data, or view the import and export queues.

Batch Delete Queue - View the batch delete requests (active and completed).

Batch Assign Book Queue - View the Batch Book Assignment requests (active and completed).

Integration Event Administration - Manage Integration Event

Integration

Web Services Administration - View and download web services.

Web Services Utilization - Review a summary of services used by your company.

Application Customization

Application Customization - Customize application specific to your company; create custom page layouts, homepage layouts, search result layouts, and dynamic layouts; change field names, modify picklist values, create custom fields, specify cascading picklists, define custom web tabs and applets, set up custom audit trail and rename record types.

Business Process Management

Workflow Configuration - Extend business processes with workflow rules to send emails, create, update or delete information, wait for a time period and enable outbound integration requests. Workflow rules and actions will not be processed unless the "Enable Workflow" checkbox is checked on the Company Profile Page.

Workflow Monitor - Monitor and manage active instances of waiting workflows, and review workflow error messages.

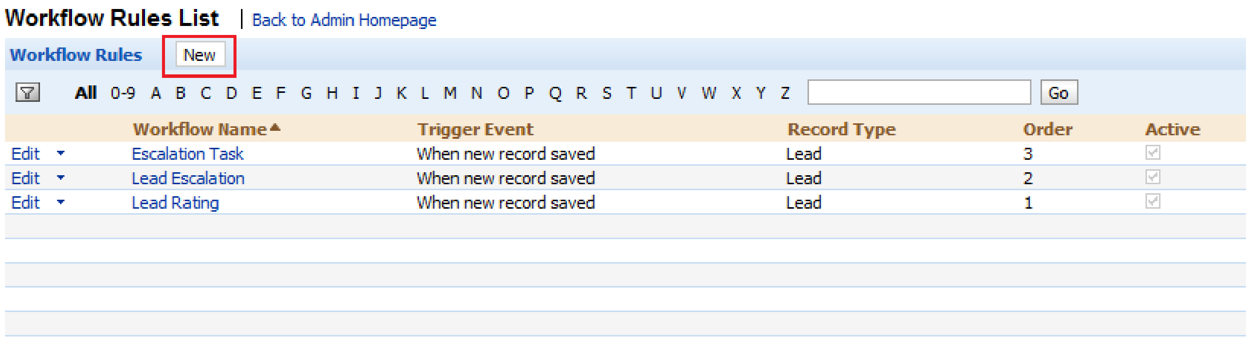
Data Rules & Assignment - Define the data rules for your company, including automatic assignment of records, forecasting, and sales methodologies.

Content Management

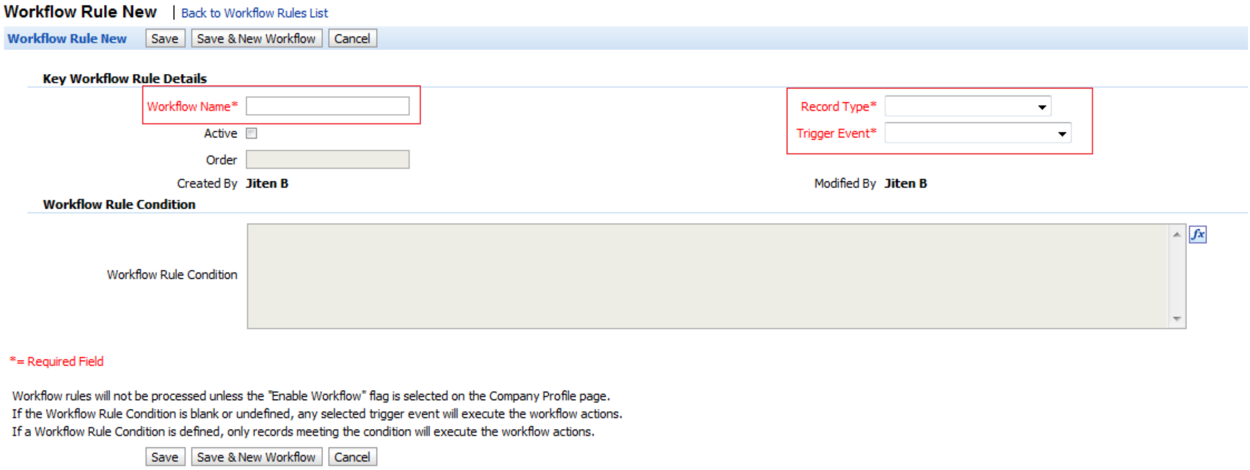
Content Management - Define your company Product list and hierarchy. View, delete and replace all of your company's Attachments. Manage access to Reports Folders and define visibility to shared custom analyses folders. Define your company's assessments templates.

Marketing Administration

Email Marketing - Manage email marketing users, hosting libraries and access email usage reports



	Workflow Name ▲	Trigger Event	Record Type	Order	Active
Edit ▾	Escalation Task	When new record saved	Lead	3	☑
Edit ▾	Lead Escalation	When new record saved	Lead	2	☑
Edit ▾	Lead Rating	When new record saved	Lead	1	☑



Key Workflow Rule Details

Workflow Name*

Active ☐

Order

Created By **Jiten B**

Record Type*

Trigger Event*

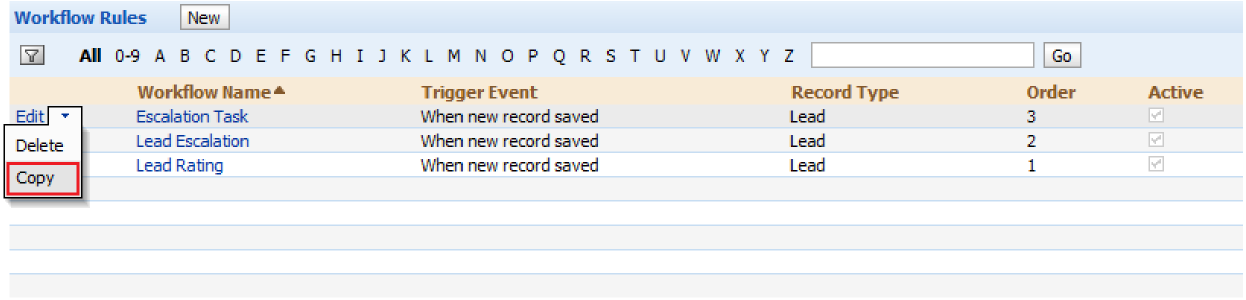
Modified By **Jiten B**

Workflow Rule Condition

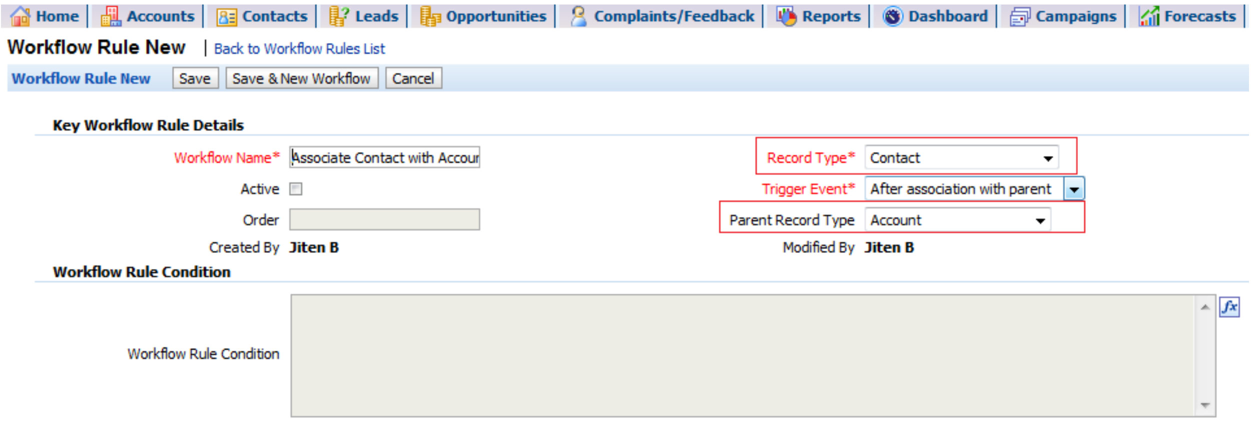
Workflow Rule Condition

*= Required Field

Workflow rules will not be processed unless the "Enable Workflow" flag is selected on the Company Profile page.
If the Workflow Rule Condition is blank or undefined, any selected trigger event will execute the workflow actions.
If a Workflow Rule Condition is defined, only records meeting the condition will execute the workflow actions.



	Workflow Name ▲	Trigger Event	Record Type	Order	Active
Edit ▾	Escalation Task	When new record saved	Lead	3	☑
	Lead Escalation	When new record saved	Lead	2	☑
	Lead Rating	When new record saved	Lead	1	☑



Key Workflow Rule Details

Workflow Name* Associate Contact with Accour

Active ☐

Order

Created By **Jiten B**

Record Type* Contact

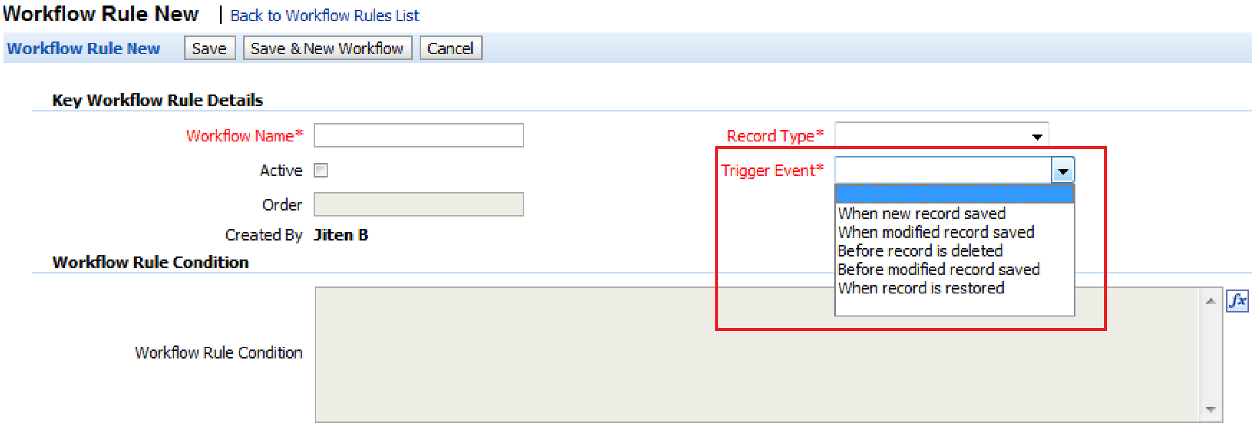
Trigger Event* After association with parent

Parent Record Type Account

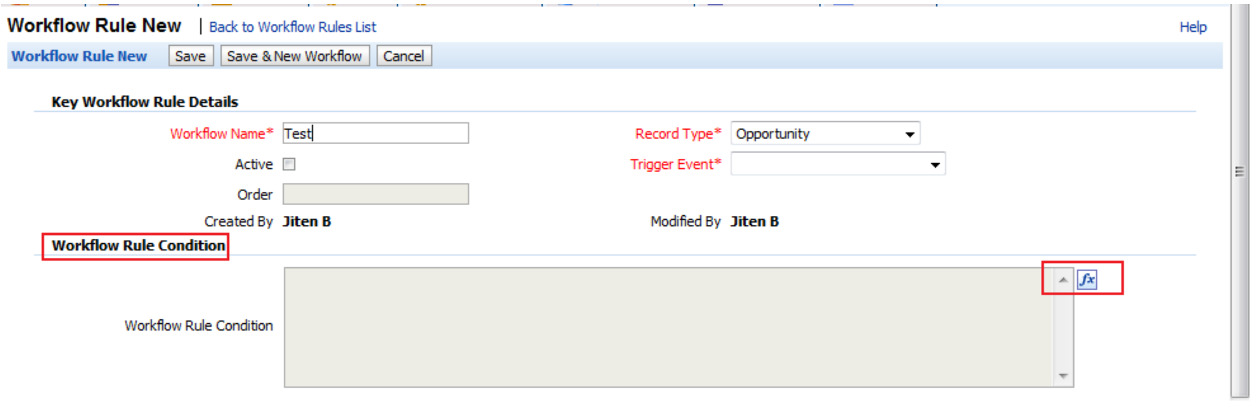
Modified By **Jiten B**

Workflow Rule Condition

Workflow Rule Condition



Created By **Jiten B**

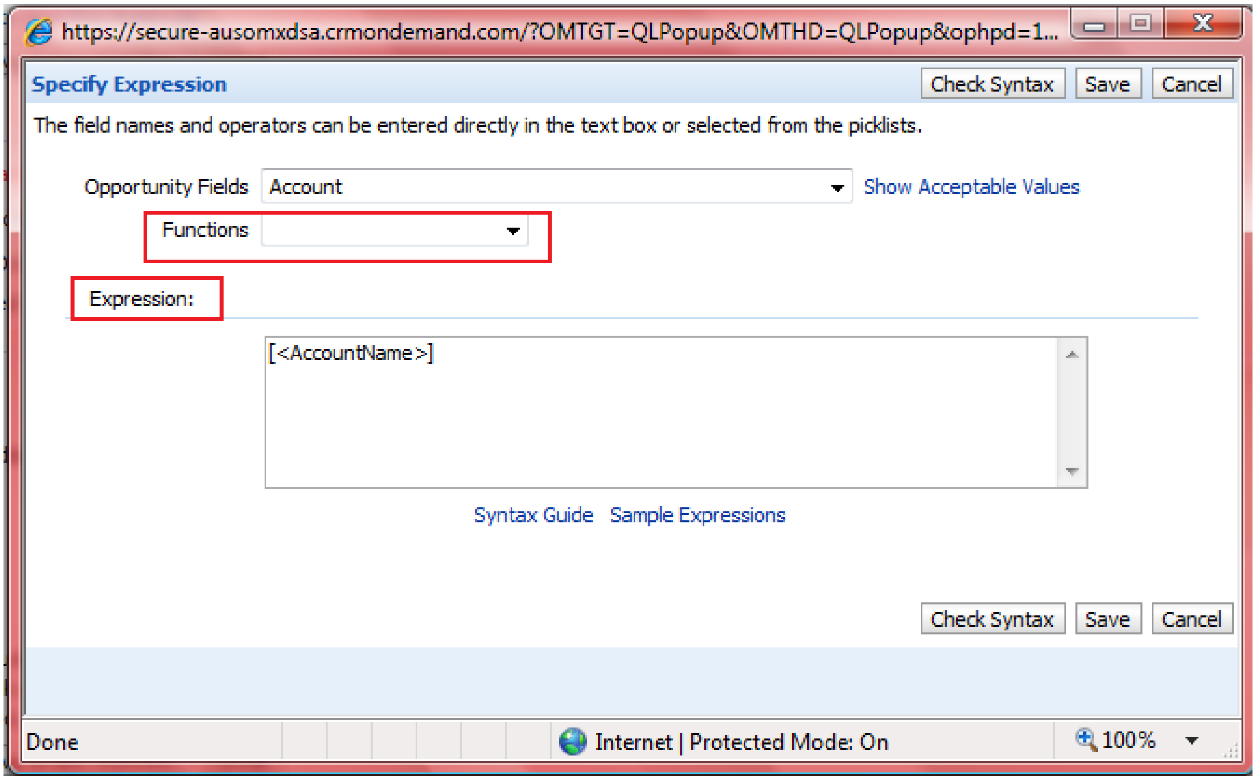


Workflow Name* Test

Record Type* Opportunity

Created By **Jiten B**

Modified By **Jiten B**



https://secure-ausomxdsa.crmondemand.com/?OMTGT=QLPopup&OMTHD=QLPopup&ophpd=1...

Specify Expression

The field names and operators can be entered directly in the text box or selected from the picklists.

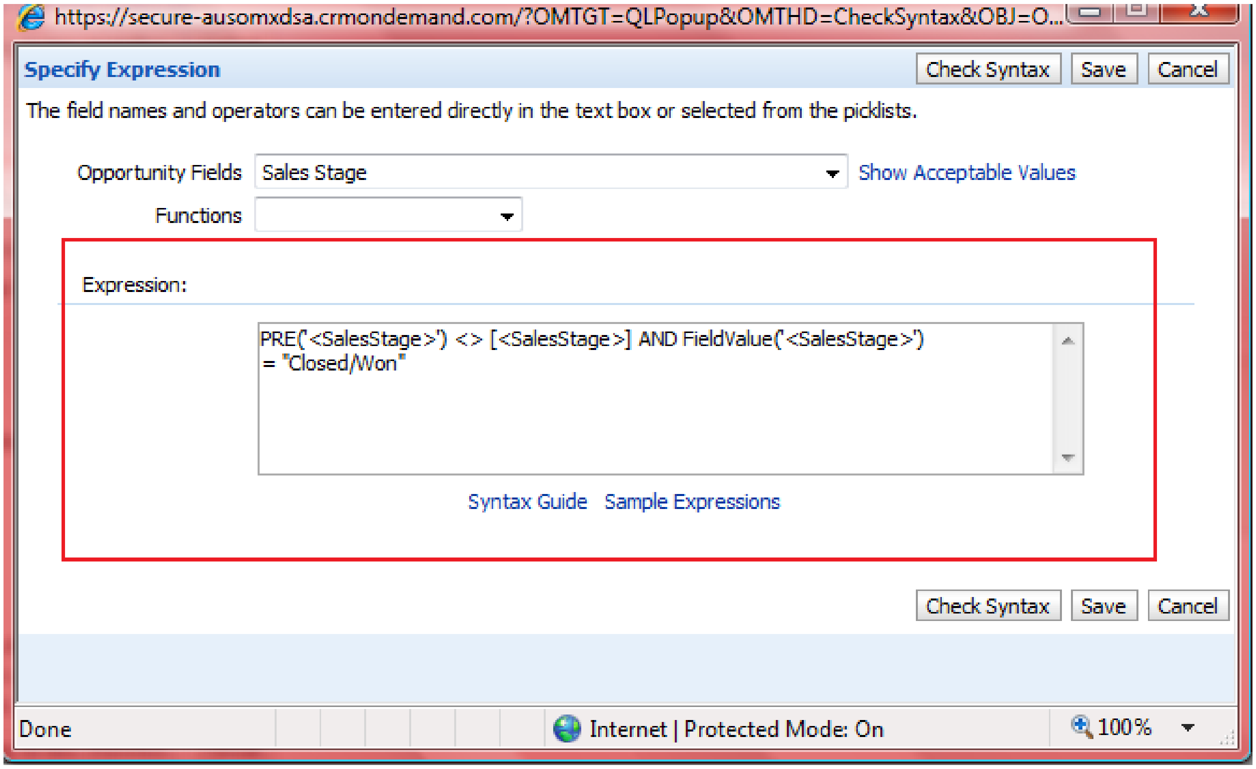
Opportunity Fields: Account

Functions:

Expression:

```
[<AccountName>]
```

Done | Internet | Protected Mode: On | 100%



https://secure-ausomxdsa.crmondemand.com/?OMTGT=QLPopup&OMTHD=CheckSyntax&OBJ=O...

Specify Expression

The field names and operators can be entered directly in the text box or selected from the picklists.

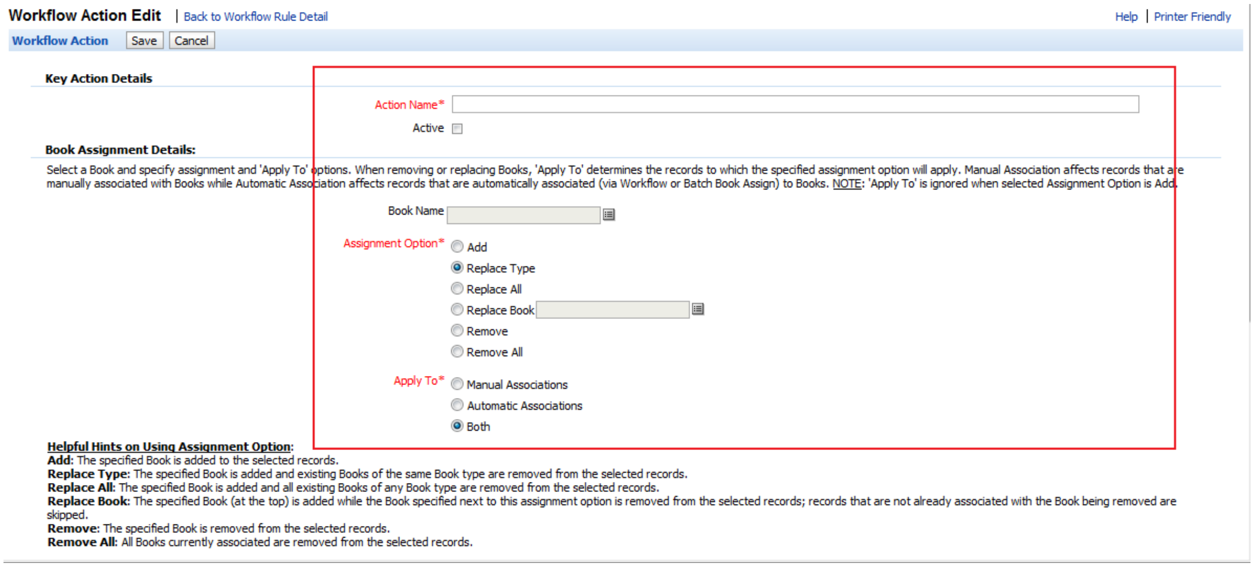
Opportunity Fields: Sales Stage

Functions:

Expression:

```
PRE('<SalesStage>') <> [<SalesStage>] AND FieldValue('<SalesStage>')
= "Closed/Won"
```

Done | Internet | Protected Mode: On | 100%



Workflow Action Edit | Back to Workflow Rule Detail Help | Printer Friendly

Workflow Action Save Cancel

Key Action Details

Action Name*

Active ☐

Book Assignment Details:

Select a Book and specify assignment and 'Apply To' options. When removing or replacing Books, 'Apply To' determines the records to which the specified assignment option will apply. Manual Association affects records that are manually associated with Books while Automatic Association affects records that are automatically associated (via Workflow or Batch Book Assign) to Books. NOTE: 'Apply To' is ignored when selected Assignment Option is Add.

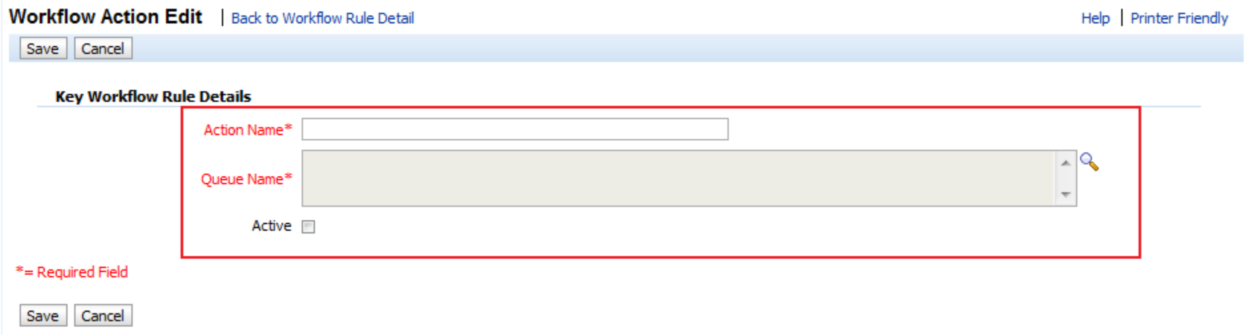
Book Name

Assignment Option*
○ Add
● Replace Type
○ Replace All
○ Replace Book
○ Remove
○ Remove All

Apply To*
○ Manual Associations
○ Automatic Associations
● Both

Helpful Hints on Using Assignment Option:

Add: The specified Book is added to the selected records.
Replace Type: The specified Book is added and existing Books of the same Book type are removed from the selected records.
Replace All: The specified Book is added and all existing Books of any Book type are removed from the selected records.
Replace Book: The specified Book (at the top) is added while the Book specified next to this assignment option is removed from the selected records; records that are not already associated with the Book being removed are skipped.
Remove: The specified Book is removed from the selected records.
Remove All: All Books currently associated are removed from the selected records.



Workflow Action Edit | Back to Workflow Rule Detail Help | Printer Friendly

Save Cancel

Key Workflow Rule Details

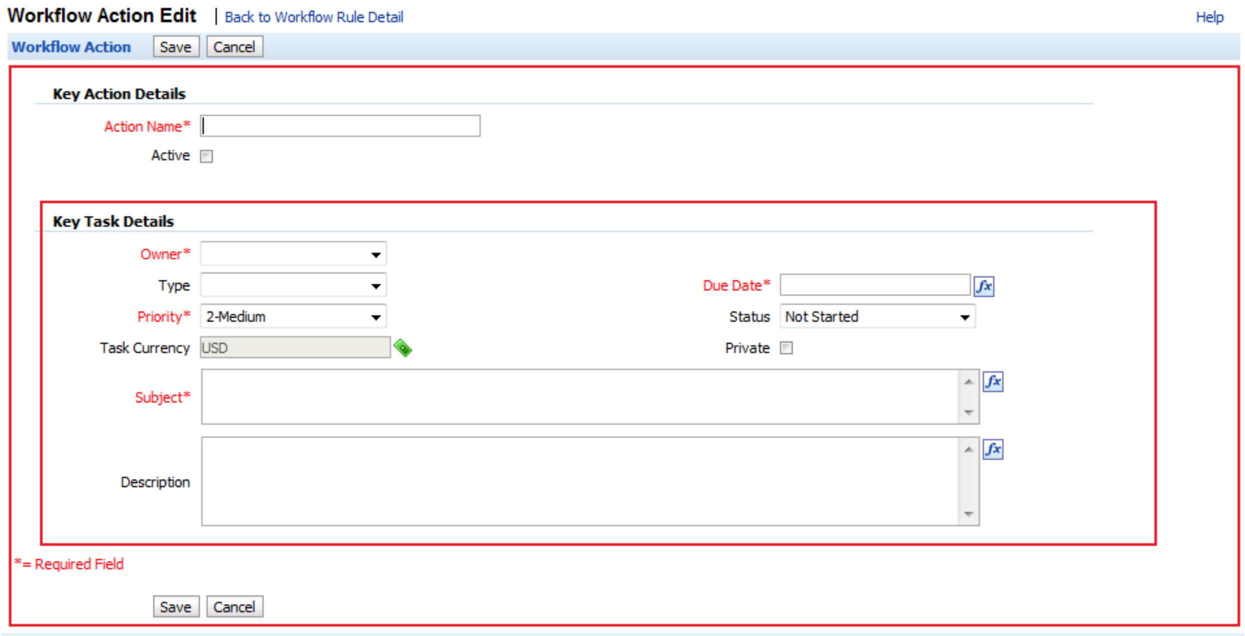
Action Name*

Queue Name*

Active ☐

*= Required Field

Save Cancel



Workflow Action Edit | Back to Workflow Rule Detail Help

Workflow Action Save Cancel

Key Action Details

Action Name*

Active ☐

Key Task Details

Owner*

Type

Due Date*

Priority* 2-Medium

Status Not Started

Task Currency USD

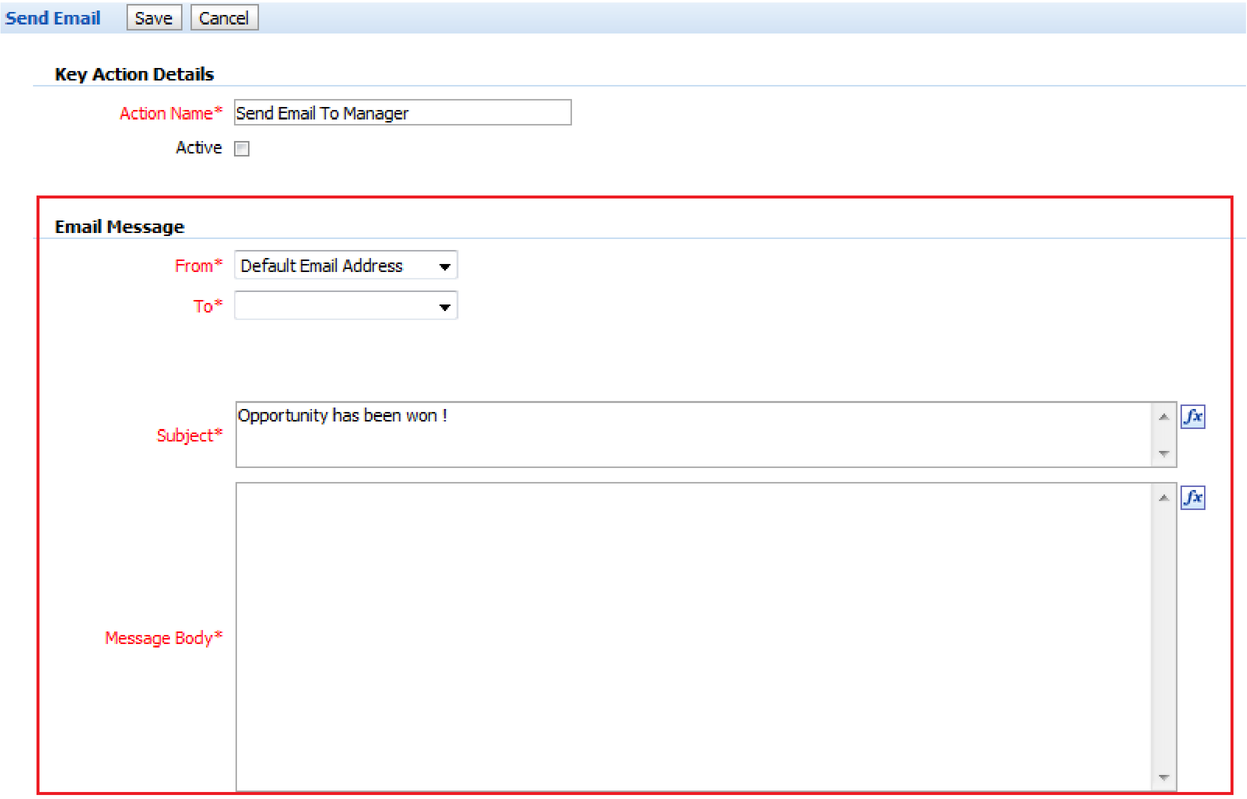
Private ☐

Subject*

Description

*= Required Field

Save Cancel



Key Action Details

Action Name* Send Email To Manager

Active ☐

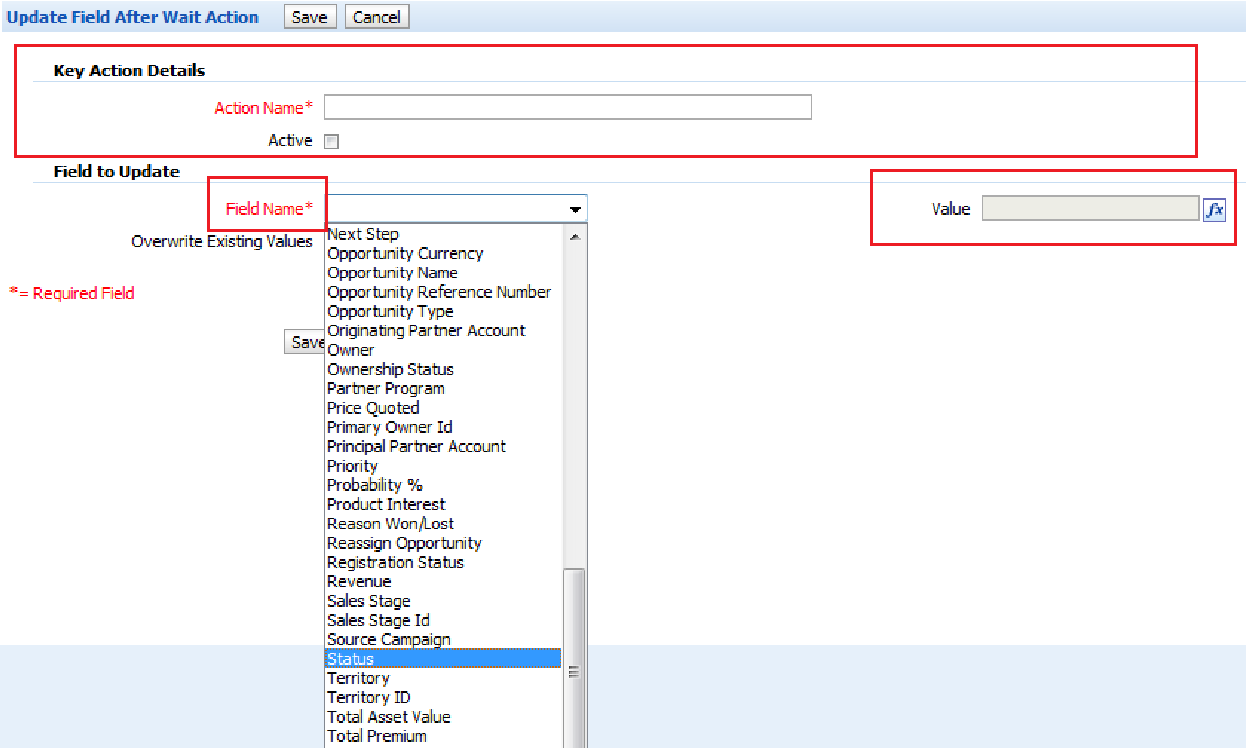
Email Message

From* Default Email Address

To*

Subject* Opportunity has been won !

Message Body*



Key Action Details

Action Name*

Active ☐

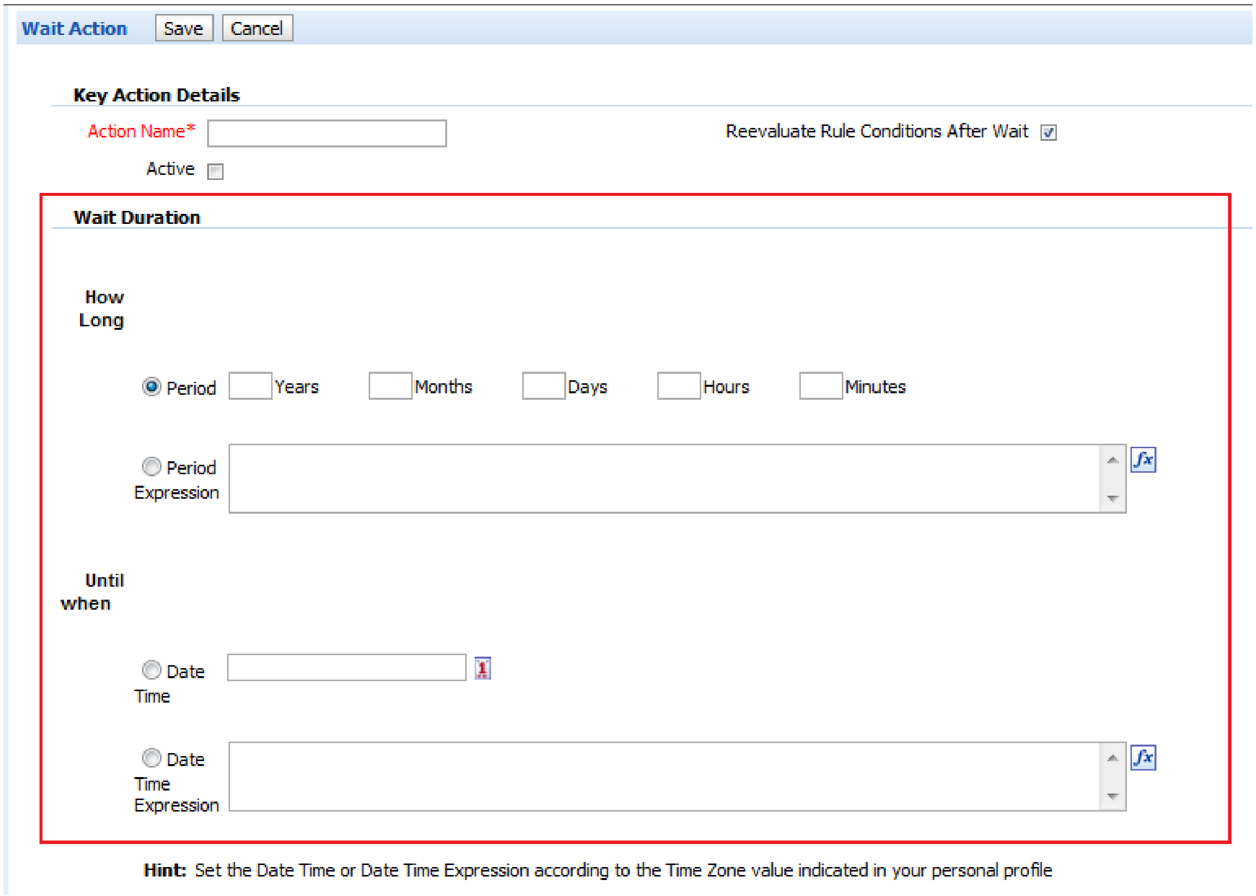
Field to Update

Field Name*

Overwrite Existing Values

Value

*= Required Field



Key Action Details

Action Name*

Reevaluate Rule Conditions After Wait ☑

Active ☐

Wait Duration

How Long

● Period Years Months Days Hours Minutes

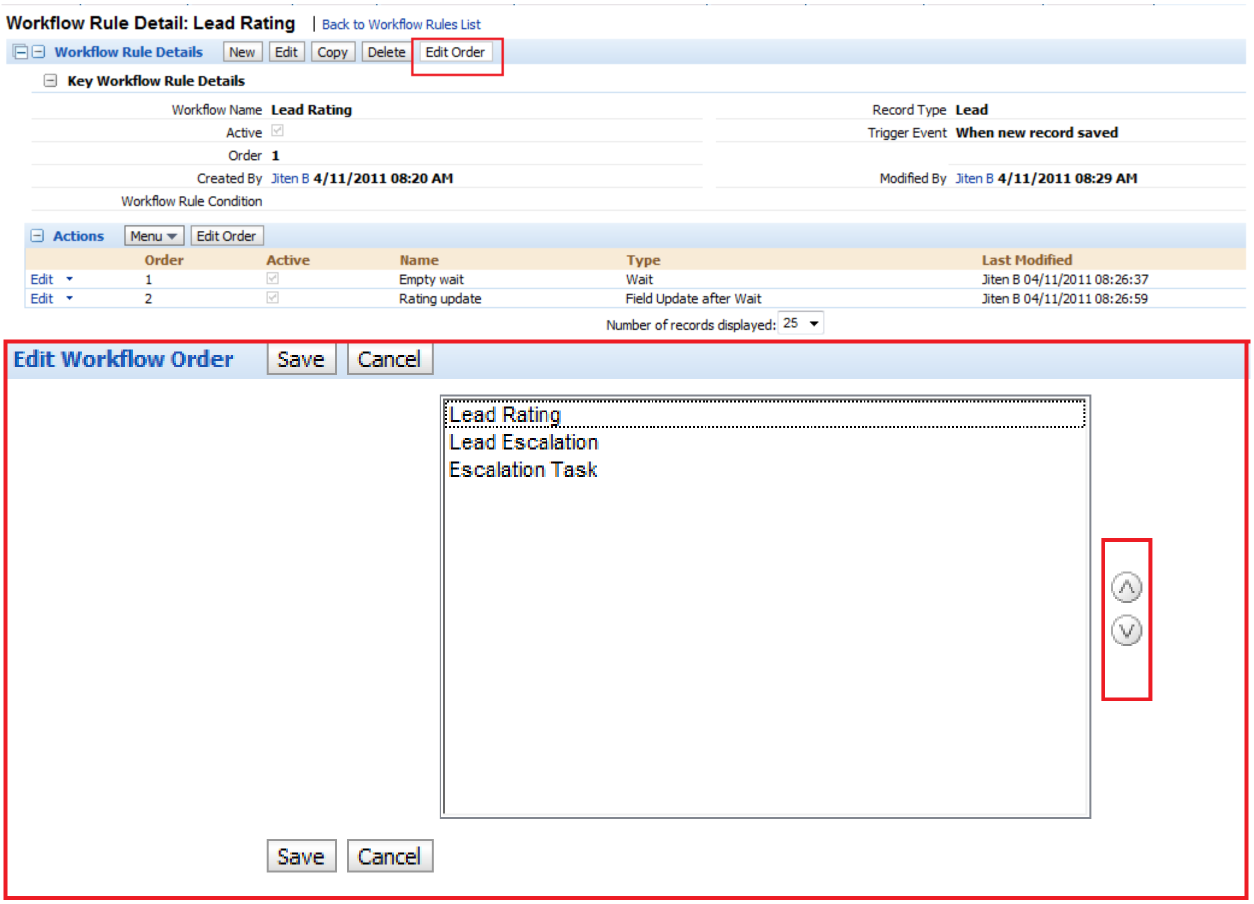
○ Period Expression

Until when

○ Date Time

○ Date Time Expression

Hint: Set the Date Time or Date Time Expression according to the Time Zone value indicated in your personal profile



Workflow Rule Detail: Lead Rating | Back to Workflow Rules List

Key Workflow Rule Details

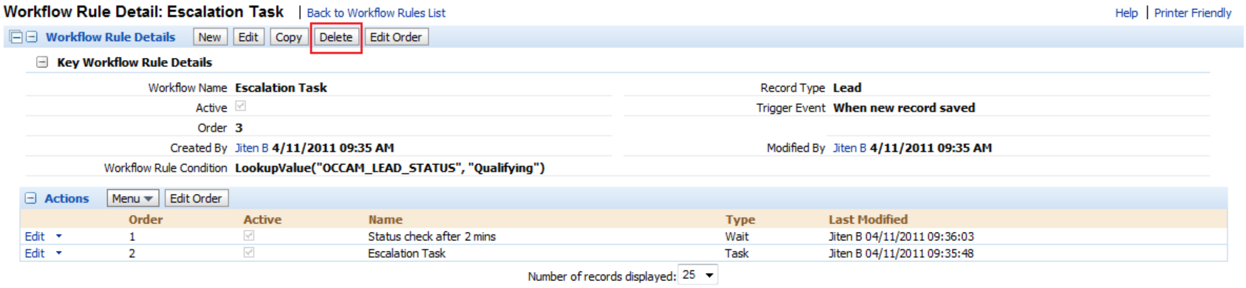
Workflow Name **Lead Rating**
Record Type **Lead**
Active ☑
Trigger Event **When new record saved**
Order **1**
Created By Jiten B **4/11/2011 08:20 AM**
Modified By Jiten B **4/11/2011 08:29 AM**
Workflow Rule Condition

	Order	Active	Name	Type	Last Modified
Edit	1	☑	Empty wait	Wait	Jiten B 04/11/2011 08:26:37
Edit	2	☑	Rating update	Field Update after Wait	Jiten B 04/11/2011 08:26:59

Number of records displayed: 25

Edit Workflow Order

Lead Rating
Lead Escalation
Escalation Task



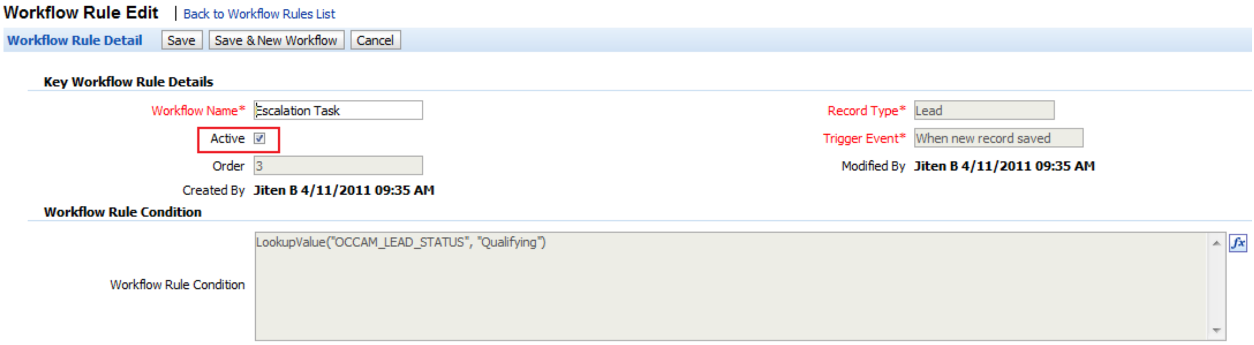
Workflow Rule Detail: Escalation Task | Back to Workflow Rules List

Key Workflow Rule Details

Workflow Name **Escalation Task**
Record Type **Lead**
Active ☑
Trigger Event **When new record saved**
Order **3**
Created By Jiten B **4/11/2011 09:35 AM**
Modified By Jiten B **4/11/2011 09:35 AM**
Workflow Rule Condition **LookupValue("OCCAM_LEAD_STATUS", "Qualifying")**

	Order	Active	Name	Type	Last Modified
Edit	1	☑	Status check after 2 mins	Wait	Jiten B 04/11/2011 09:36:03
Edit	2	☑	Escalation Task	Task	Jiten B 04/11/2011 09:35:48

Number of records displayed: 25



Key Workflow Rule Details

Workflow Name* Escalation Task

Active ☑

Order 3

Created By Jiten B 4/11/2011 09:35 AM

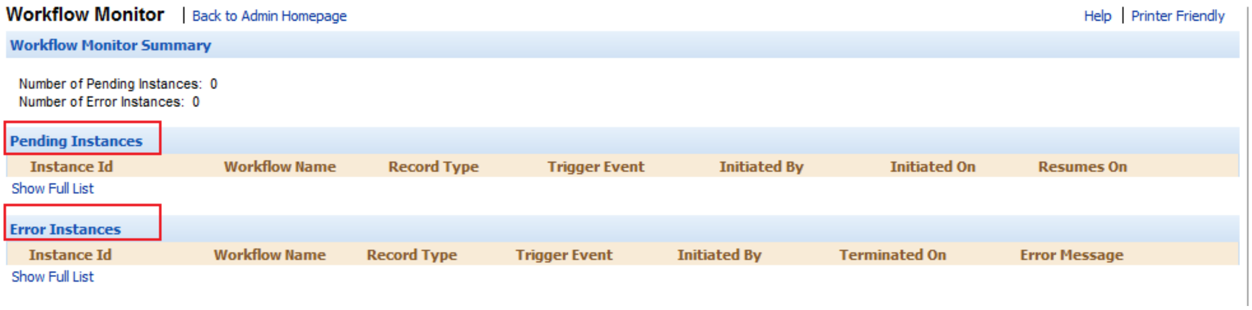
Record Type* Lead

Trigger Event* When new record saved

Modified By Jiten B 4/11/2011 09:35 AM

Workflow Rule Condition

Workflow Rule Condition LookupValue("OCCAM_LEAD_STATUS", "Qualifying")



Number of Pending Instances: 0

Number of Error Instances: 0

Pending Instances

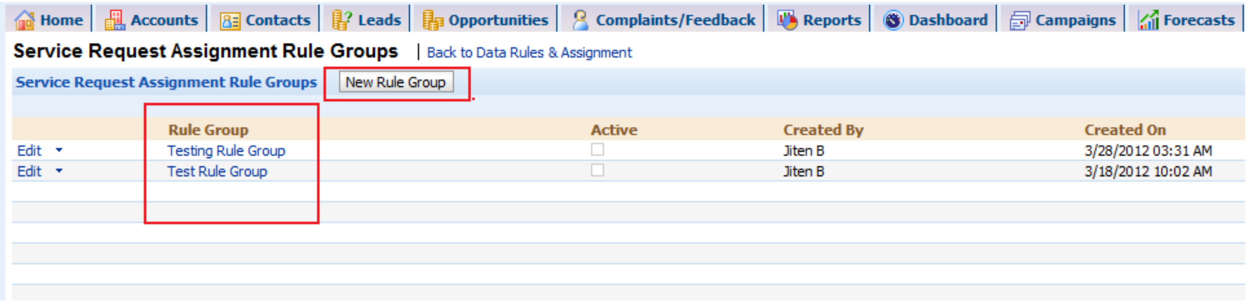
Instance Id	Workflow Name	Record Type	Trigger Event	Initiated By	Initiated On	Resumes On

Show Full List

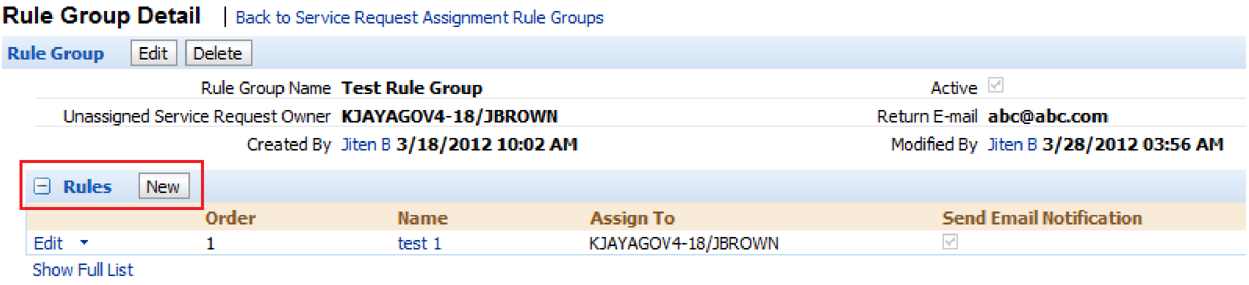
Error Instances

Instance Id	Workflow Name	Record Type	Trigger Event	Initiated By	Terminated On	Error Message

Show Full List



	Rule Group	Active	Created By	Created On
Edit ▾	Testing Rule Group	☐	Jiten B	3/28/2012 03:31 AM
Edit ▾	Test Rule Group	☐	Jiten B	3/18/2012 10:02 AM



Rule Group Name **Test Rule Group**

Active ☑

Unassigned Service Request Owner **KJAYAGOV4-18/JBROWN**

Return E-mail **abc@abc.com**

Created By Jiten B **3/18/2012 10:02 AM**

Modified By Jiten B **3/28/2012 03:56 AM**

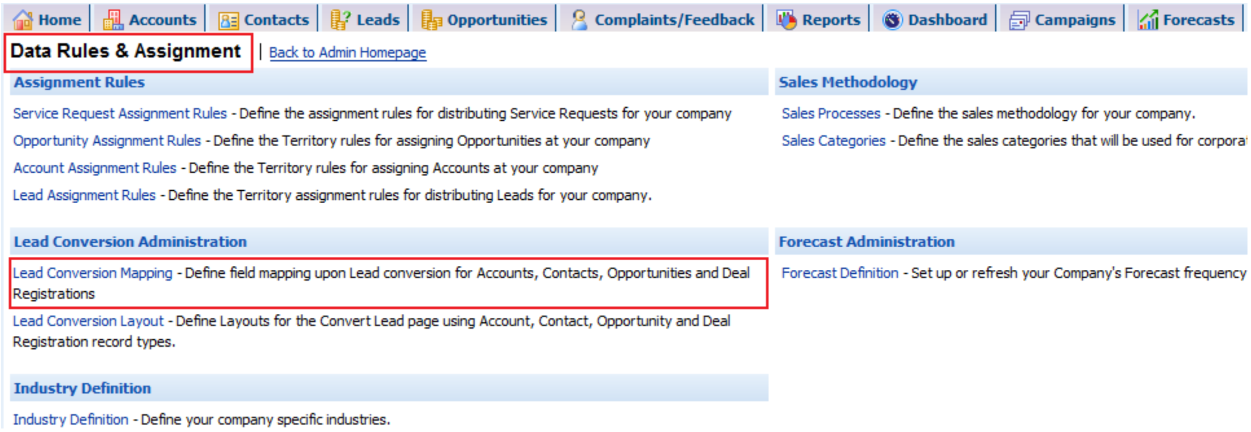
	Order	Name	Assign To	Send Email Notification
Edit ▾	1	test 1	KJAYAGOV4-18/JBROWN	☑

Show Full List

Rule Detail: test 1 | Back to Rule Group Detail

Rule Name	test 1
Order	1
Assign To	KJAYAGOV4-18/JBROWN
Send Email Notification	☑

Field	Condition	Value(s)



Data Rules & Assignment | Back to Admin Homepage

Assignment Rules

Service Request Assignment Rules - Define the assignment rules for distributing Service Requests for your company

Opportunity Assignment Rules - Define the Territory rules for assigning Opportunities at your company

Account Assignment Rules - Define the Territory rules for assigning Accounts at your company

Lead Assignment Rules - Define the Territory assignment rules for distributing Leads for your company.

Lead Conversion Administration

Lead Conversion Mapping - Define field mapping upon Lead conversion for Accounts, Contacts, Opportunities and Deal Registrations

Lead Conversion Layout - Define Layouts for the Convert Lead page using Account, Contact, Opportunity and Deal Registration record types.

Industry Definition

Industry Definition - Define your company specific industries.

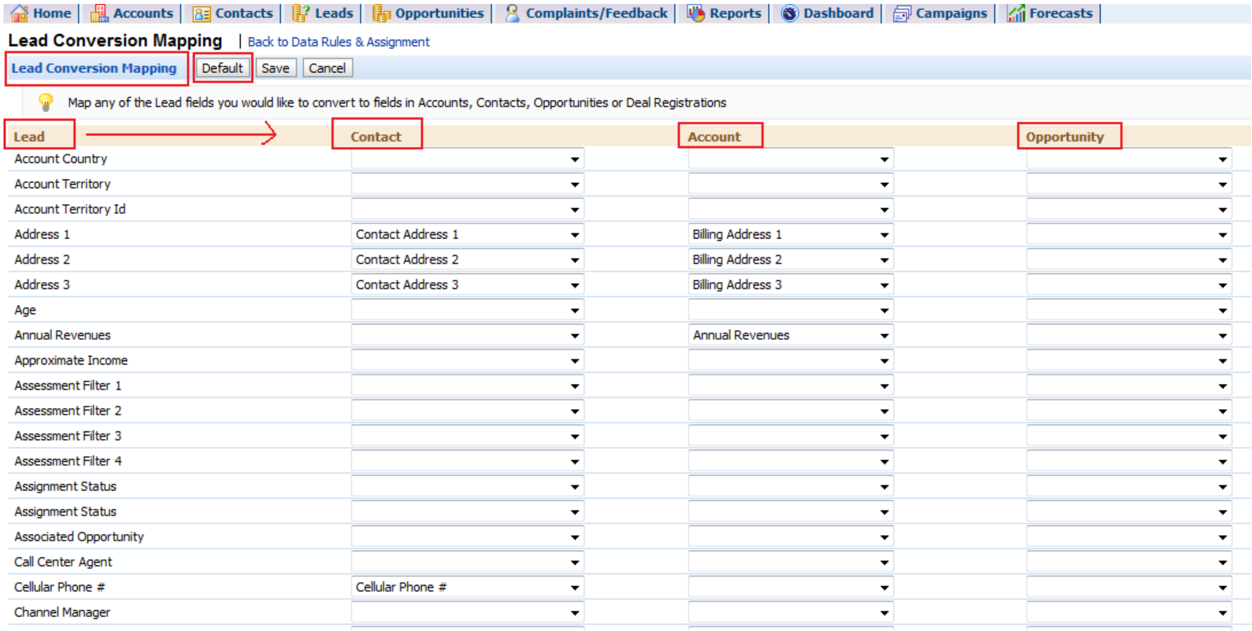
Sales Methodology

Sales Processes - Define the sales methodology for your company.

Sales Categories - Define the sales categories that will be used for corpora

Forecast Administration

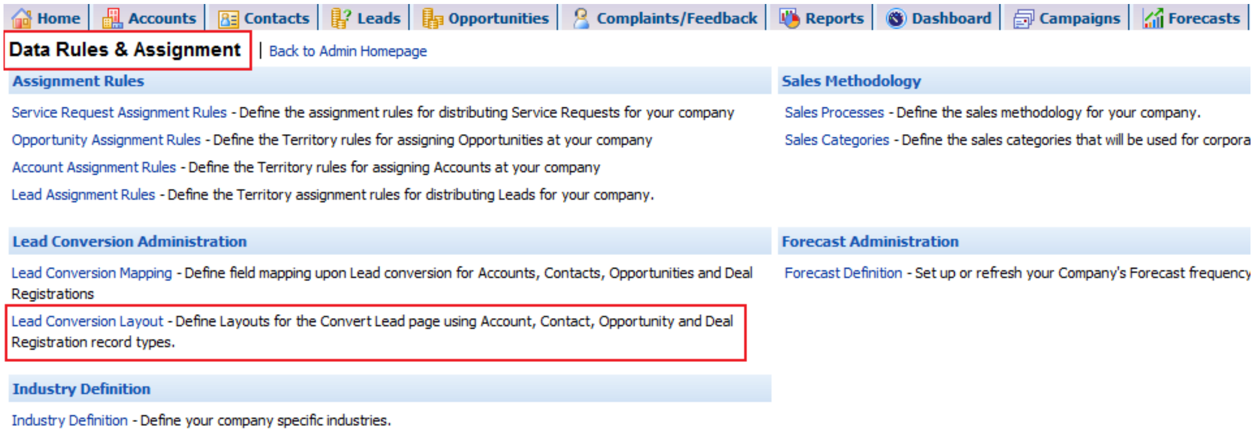
Forecast Definition - Set up or refresh your Company's Forecast frequency



Lead Conversion Mapping | Back to Data Rules & Assignment

Map any of the Lead fields you would like to convert to fields in Accounts, Contacts, Opportunities or Deal Registrations

Lead	Contact	Account	Opportunity
Account Country			
Account Territory			
Account Territory Id			
Address 1	Contact Address 1	Billing Address 1	
Address 2	Contact Address 2	Billing Address 2	
Address 3	Contact Address 3	Billing Address 3	
Age			
Annual Revenues		Annual Revenues	
Approximate Income			
Assessment Filter 1			
Assessment Filter 2			
Assessment Filter 3			
Assessment Filter 4			
Assignment Status			
Assignment Status			
Associated Opportunity			
Call Center Agent			
Cellular Phone #	Cellular Phone #		
Channel Manager			



Data Rules & Assignment

Assignment Rules

Service Request Assignment Rules - Define the assignment rules for distributing Service Requests for your company

Opportunity Assignment Rules - Define the Territory rules for assigning Opportunities at your company

Account Assignment Rules - Define the Territory rules for assigning Accounts at your company

Lead Assignment Rules - Define the Territory assignment rules for distributing Leads for your company.

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Sales Processes - Define the sales methodology for your company.

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Forecast Administration

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Industry Definition

Industry Definition - Define your company specific industries.

Lead Conversion Layout

Layout Name

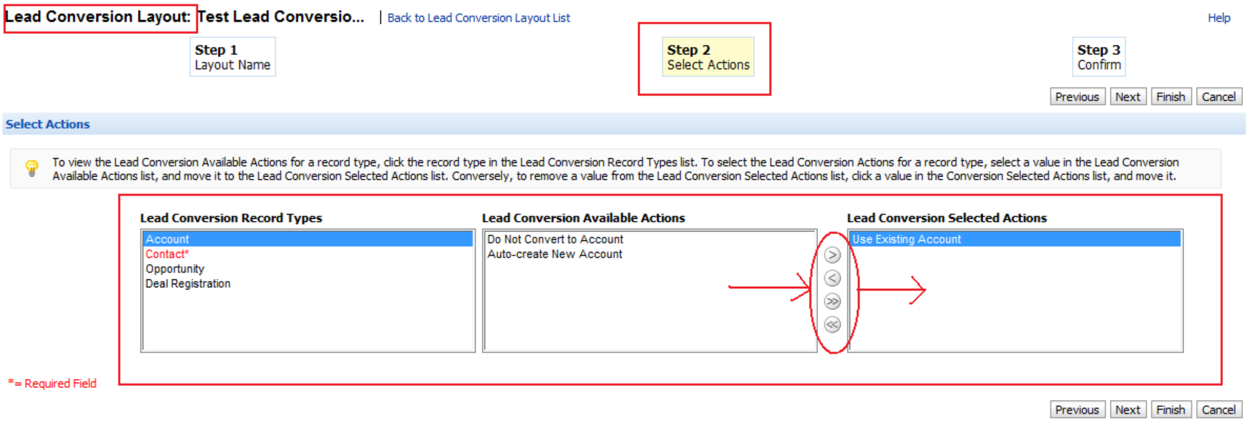
Lead Conversion Layout Name * Test Lead Conversion Layout

Description Sample Layout

Default Lead Conversion Layout ☑

Mark for Translation ☐

*= Required Field



Lead Conversion Layout: Test Lead Conversio...

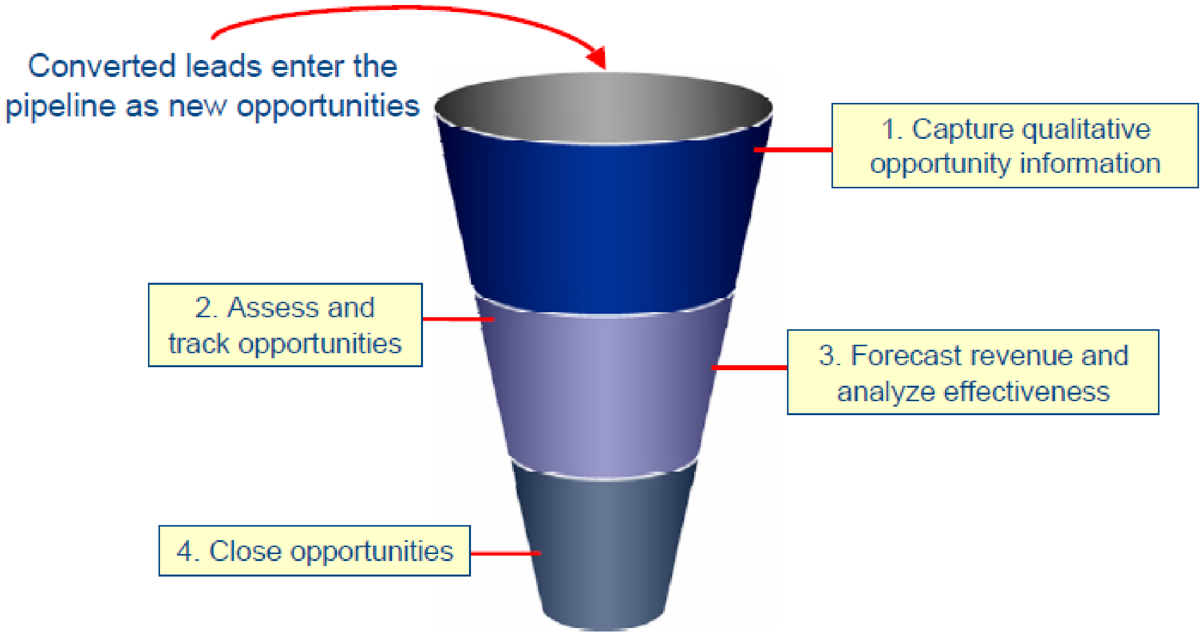
Select Actions

To view the Lead Conversion Available Actions for a record type, click the record type in the Lead Conversion Record Types list. To select the Lead Conversion Actions for a record type, select a value in the Lead Conversion Available Actions list, and move it to the Lead Conversion Selected Actions list. Conversely, to remove a value from the Lead Conversion Selected Actions list, click a value in the Conversion Selected Actions list, and move it.

Lead Conversion Record Types	Lead Conversion Available Actions	Lead Conversion Selected Actions
Account	Do Not Convert to Account	Use Existing Account
Contact*	Auto-create New Account	
Opportunity		
Deal Registration		

*= Required Field

Tracks opportunities through the sales cycle:



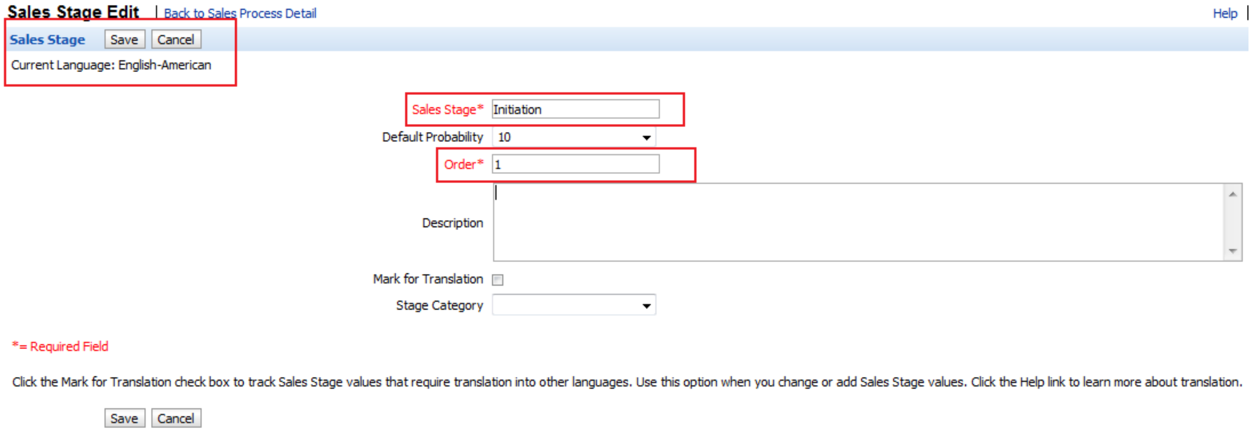
Converted leads enter the pipeline as new opportunities

1. Capture qualitative opportunity information

2. Assess and track opportunities

3. Forecast revenue and analyze effectiveness

4. Close opportunities



Current Language: English-American

Sales Stage* Initiation

Default Probability 10

Order* 1

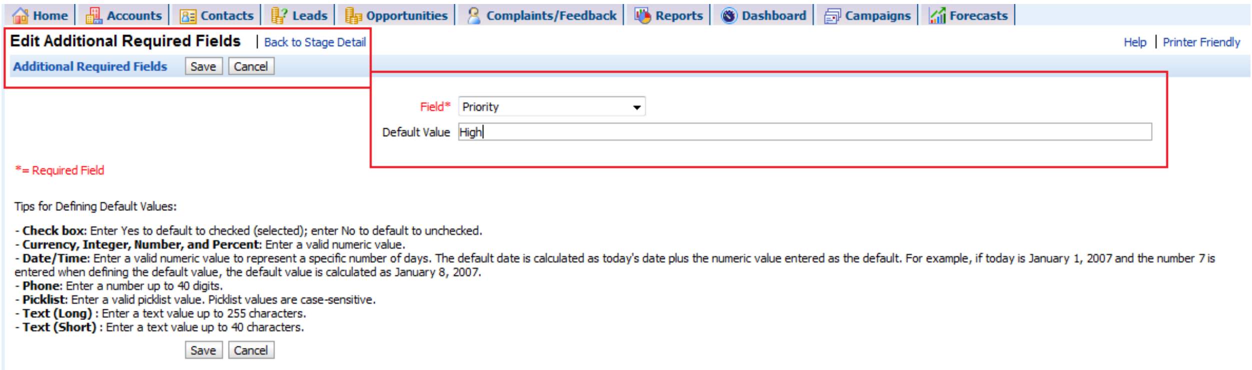
Description

Mark for Translation ☐

Stage Category

*= Required Field

Click the Mark for Translation check box to track Sales Stage values that require translation into other languages. Use this option when you change or add Sales Stage values. Click the Help link to learn more about translation.



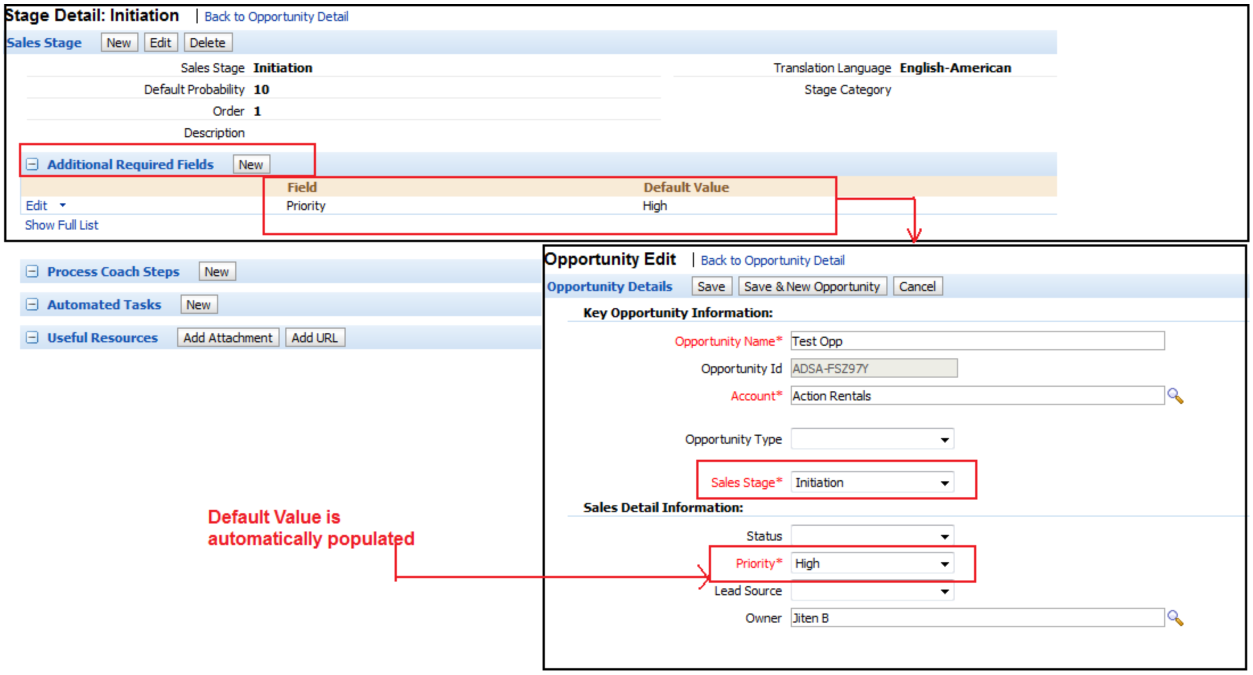
Field* Priority

Default Value High

*= Required Field

Tips for Defining Default Values:

- **Check box:** Enter Yes to default to checked (selected); enter No to default to unchecked.
- **Currency, Integer, Number, and Percent:** Enter a valid numeric value.
- **Date/Time:** Enter a valid numeric value to represent a specific number of days. The default date is calculated as today's date plus the numeric value entered as the default. For example, if today is January 1, 2007 and the number 7 is entered when defining the default value, the default value is calculated as January 8, 2007.
- **Phone:** Enter a number up to 40 digits.
- **Picklist:** Enter a valid picklist value. Picklist values are case-sensitive.
- **Text (Long)** : Enter a text value up to 255 characters.
- **Text (Short)** : Enter a text value up to 40 characters.



Stage Detail: Initiation | Back to Opportunity Detail

Sales Stage **Initiation**

Default Probability **10**

Order **1**

Description

Translation Language **English-American**

Stage Category

	Field	Default Value
Edit	Priority	High

Opportunity Edit | Back to Opportunity Detail

Key Opportunity Information:

Opportunity Name* Test Opp

Opportunity Id ADSA-FSZ97Y

Account* Action Rentals

Opportunity Type

Sales Stage* Initiation

Sales Detail Information:

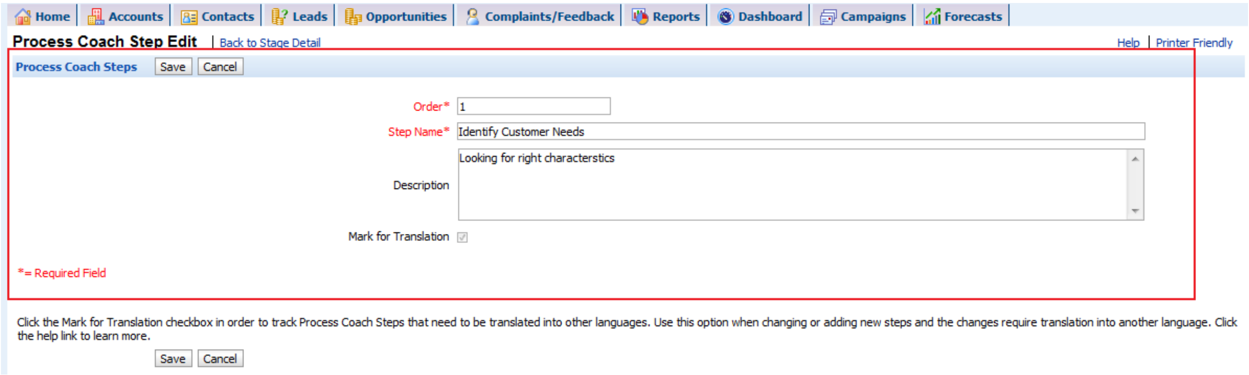
Status

Priority* High

Lead Source

Owner Jiten B

Default Value is automatically populated



Process Coach Step Edit | Back to Stage Detail

Order* 1

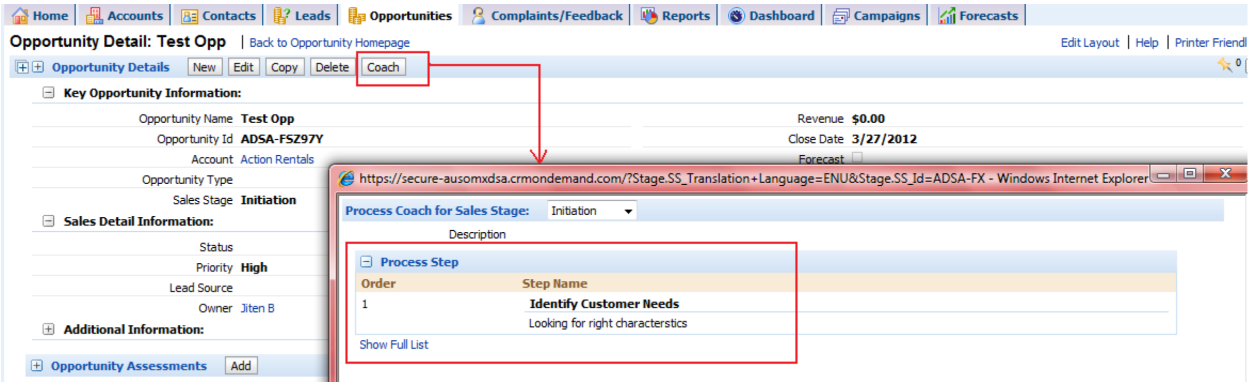
Step Name* Identify Customer Needs

Description Looking for right characterstics

Mark for Translation ☑

*= Required Field

Click the Mark for Translation checkbox in order to track Process Coach Steps that need to be translated into other languages. Use this option when changing or adding new steps and the changes require translation into another language. Click the help link to learn more.



Opportunity Detail: Test Opp | Back to Opportunity Homepage

Key Opportunity Information:

Opportunity Name **Test Opp**

Opportunity Id **ADSA-FSZ97Y**

Account Action Rentals

Opportunity Type

Sales Stage **Initiation**

Revenue **$0.00**

Close Date **3/27/2012**

Forecast ☐

Sales Detail Information:

Status

Priority **High**

Lead Source

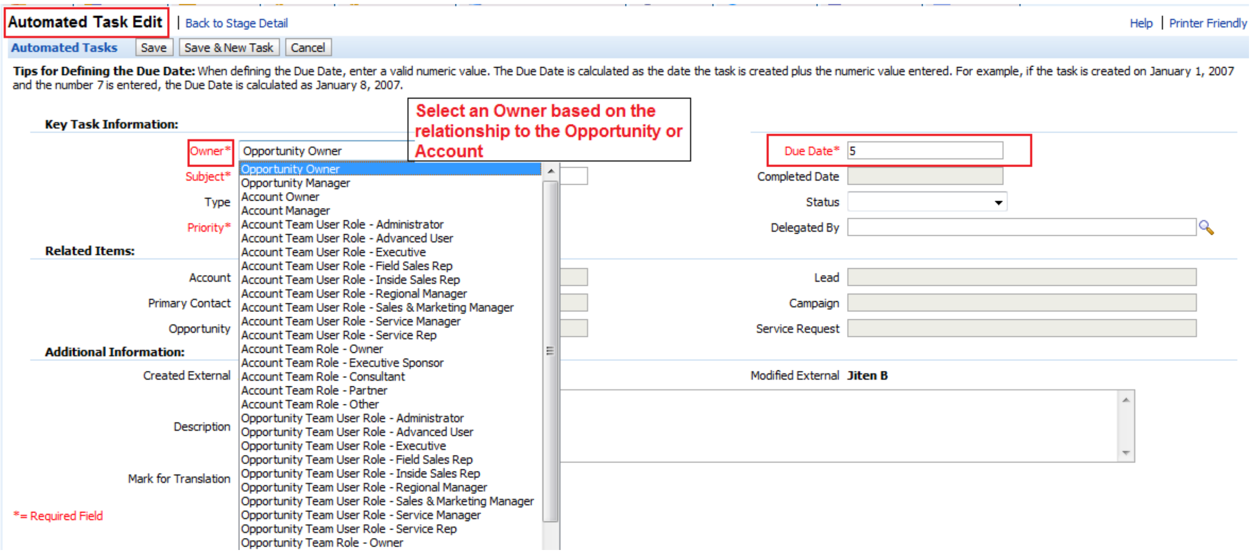
Owner Jiten B

https://secure-ausomxdsa.crmondemand.com/?Stage.SS_Translation+Language=ENU&Stage.SS_Id=ADSA-FX - Windows Internet Explorer

Process Coach for Sales Stage: Initiation

Description

Order	Step Name
1	**Identify Customer Needs** Looking for right characterstics



Tips for Defining the Due Date: When defining the Due Date, enter a valid numeric value. The Due Date is calculated as the date the task is created plus the numeric value entered. For example, if the task is created on January 1, 2007 and the number 7 is entered, the Due Date is calculated as January 8, 2007.

Select an Owner based on the relationship to the Opportunity or Account

Key Task Information:

Owner* Opportunity Owner

Due Date* 5

Subject*

Completed Date

Type

Status

Priority*

Delegated By

- Opportunity Owner
- Opportunity Manager
- Account Owner
- Account Manager
- Account Team User Role - Administrator
- Account Team User Role - Advanced User
- Account Team User Role - Executive
- Account Team User Role - Field Sales Rep
- Account Team User Role - Inside Sales Rep
- Account Team User Role - Regional Manager
- Account Team User Role - Sales & Marketing Manager
- Account Team User Role - Service Manager
- Account Team User Role - Service Rep
- Account Team Role - Owner
- Account Team Role - Executive Sponsor
- Account Team Role - Consultant
- Account Team Role - Partner
- Account Team Role - Other
- Opportunity Team User Role - Administrator
- Opportunity Team User Role - Advanced User
- Opportunity Team User Role - Executive
- Opportunity Team User Role - Field Sales Rep
- Opportunity Team User Role - Inside Sales Rep
- Opportunity Team User Role - Regional Manager
- Opportunity Team User Role - Sales & Marketing Manager
- Opportunity Team User Role - Service Manager
- Opportunity Team User Role - Service Rep
- Opportunity Team Role - Owner

Related Items:

Account

Lead

Primary Contact

Campaign

Opportunity

Service Request

Additional Information:

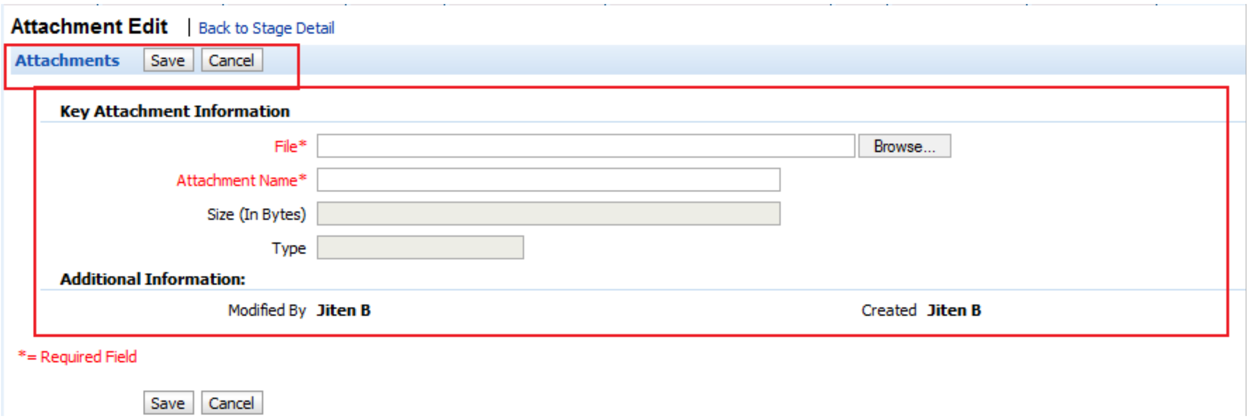
Created External

Modified External **Jiten B**

Description

Mark for Translation

*= Required Field



Key Attachment Information

File*

Attachment Name*

Size (In Bytes)

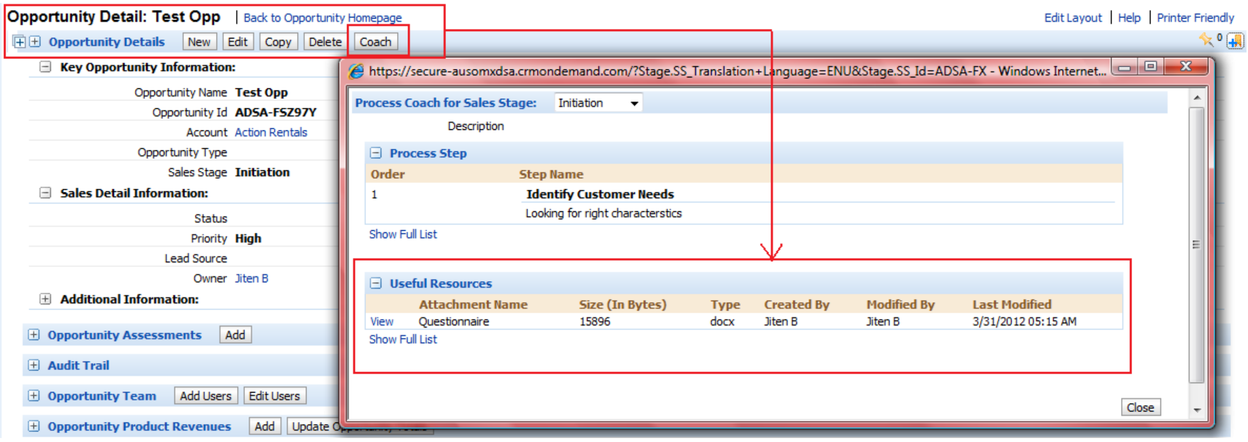
Type

Additional Information:

Modified By **Jiten B**

Created **Jiten B**

*= Required Field



Key Opportunity Information:

Opportunity Name **Test Opp**

Opportunity Id **ADSA-FSZ97Y**

Account Action Rentals

Opportunity Type

Sales Stage **Initiation**

Sales Detail Information:

Status

Priority **High**

Lead Source

Owner Jiten B

Additional Information:

https://secure-ausomxdsa.crmondemand.com/?Stage.SS_Translation+Language=ENU&Stage.SS_Id=ADSA-FX - Windows Internet...

Process Coach for Sales Stage: Initiation

Description

Process Step

Order	Step Name
1	**Identify Customer Needs** Looking for right characterstics

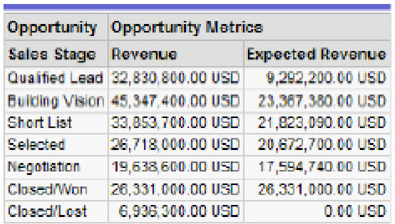
Show Full List

Useful Resources

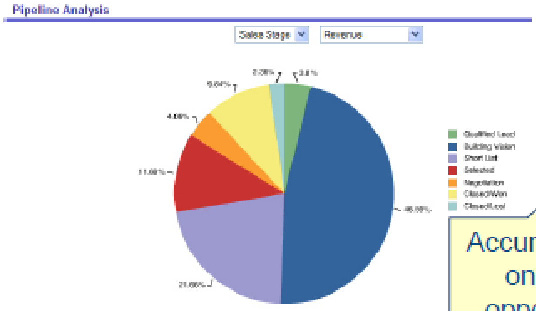
	Attachment Name	Size (In Bytes)	Type	Created By	Modified By	Last Modified
View	Questionnaire	15896	docx	Jiten B	Jiten B	3/31/2012 05:15 AM

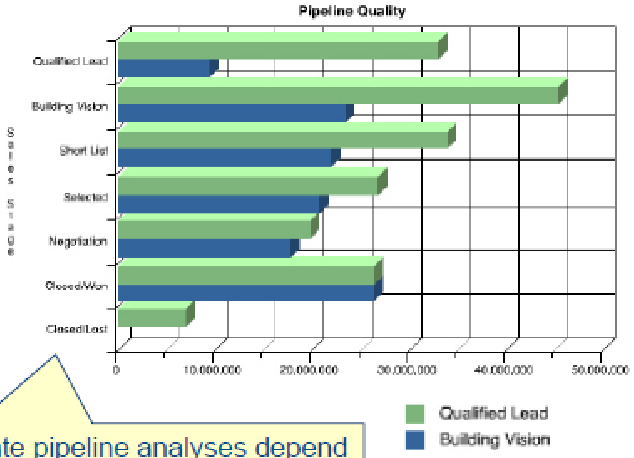
Show Full List

Describe the distribution of opportunities in the various sales stages

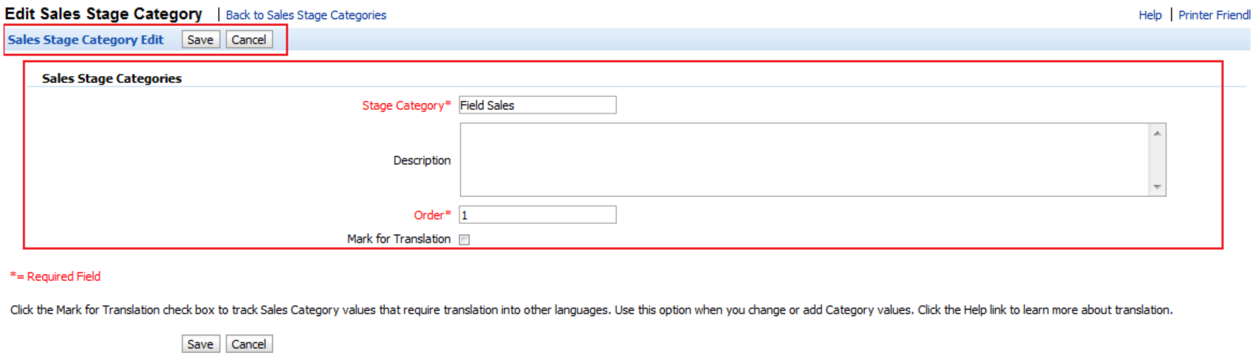


Opportunity	Opportunity Metrics	
Sales Stage	Revenue	Expected Revenue
Qualified Lead	32,830,800.00 USD	9,292,200.00 USD
Building Vision	45,347,400.00 USD	23,367,380.00 USD
Short List	33,853,700.00 USD	21,823,090.00 USD
Selected	26,718,000.00 USD	20,672,700.00 USD
Negotiation	19,638,600.00 USD	17,594,740.00 USD
Closed/Won	26,331,000.00 USD	26,331,000.00 USD
Closed/Lost	6,936,300.00 USD	0.00 USD





Accurate pipeline analyses depend on salespeople keeping their opportunity sales stages current



Edit Sales Stage Category | Back to Sales Stage Categories

Sales Stage Categories

Stage Category* Field Sales

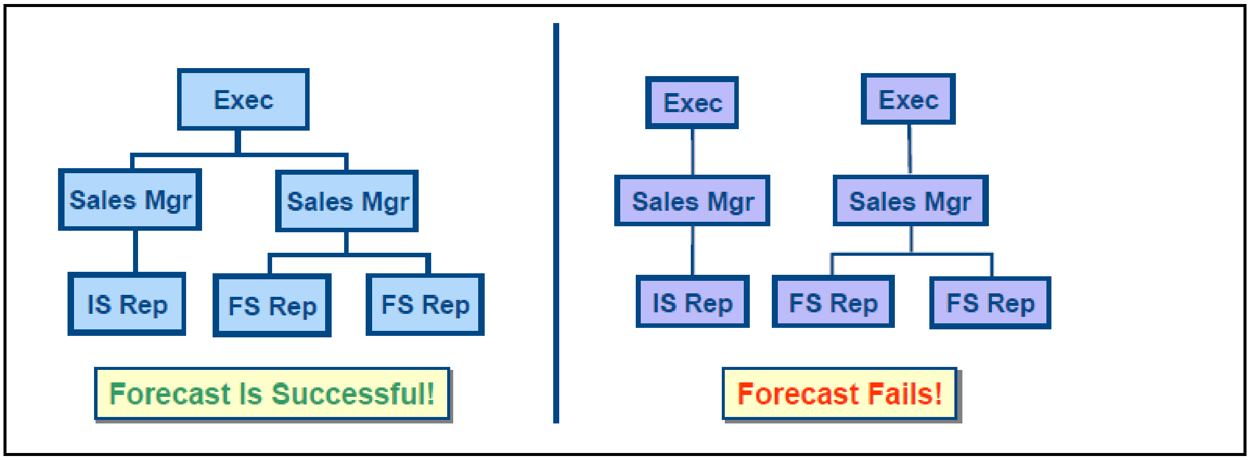
Description

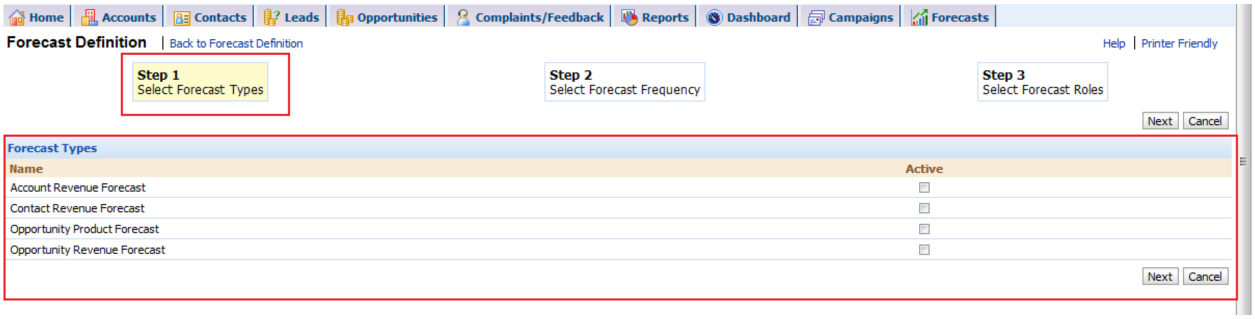
Order* 1

Mark for Translation ☐

*= Required Field

Click the Mark for Translation check box to track Sales Category values that require translation into other languages. Use this option when you change or add Category values. Click the Help link to learn more about translation.





Forecast Definition | Back to Forecast Definition

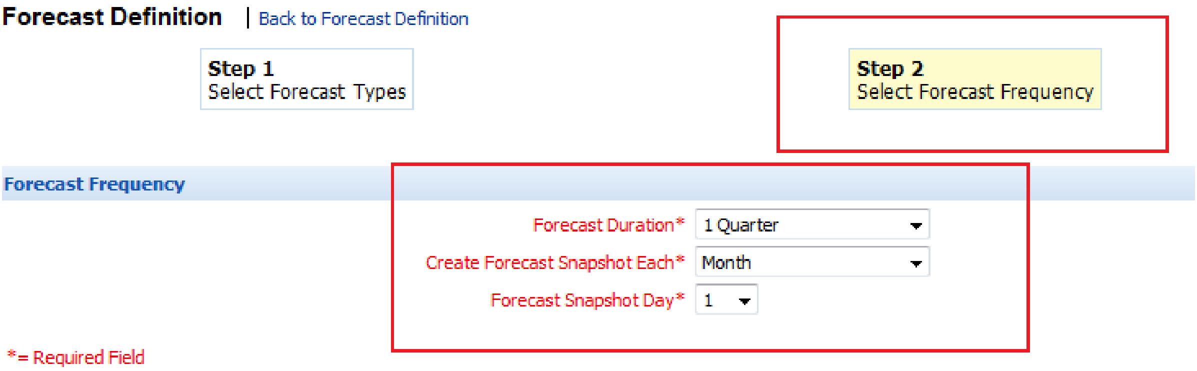
Step 1 Select Forecast Types

Step 2 Select Forecast Frequency

Step 3 Select Forecast Roles

Forecast Types

Name	Active
Account Revenue Forecast	☐
Contact Revenue Forecast	☐
Opportunity Product Forecast	☐
Opportunity Revenue Forecast	☐



Forecast Definition | Back to Forecast Definition

Step 1 Select Forecast Types

Step 2 Select Forecast Frequency

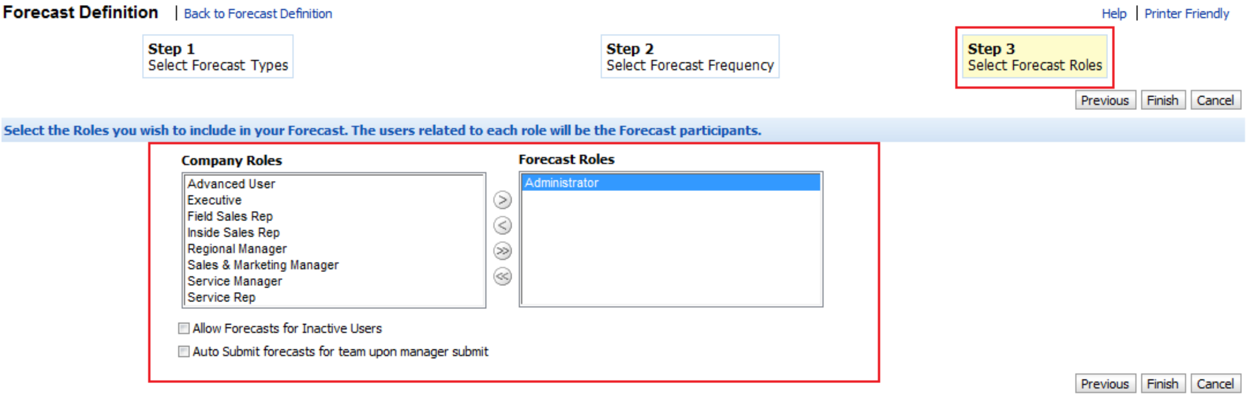
Forecast Frequency

Forecast Duration* 1 Quarter

Create Forecast Snapshot Each* Month

Forecast Snapshot Day* 1

*= Required Field



Forecast Definition | Back to Forecast Definition

Step 1 Select Forecast Types

Step 2 Select Forecast Frequency

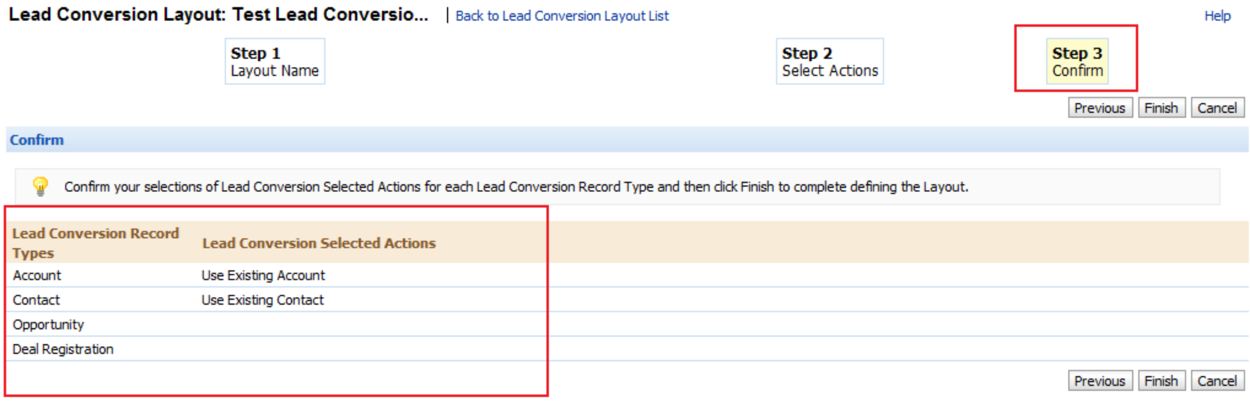
Step 3 Select Forecast Roles

Select the Roles you wish to include in your Forecast. The users related to each role will be the Forecast participants.

Company Roles	Forecast Roles
Advanced User Executive Field Sales Rep Inside Sales Rep Regional Manager Sales & Marketing Manager Service Manager Service Rep	Administrator

☐ Allow Forecasts for Inactive Users

☐ Auto Submit forecasts for team upon manager submit



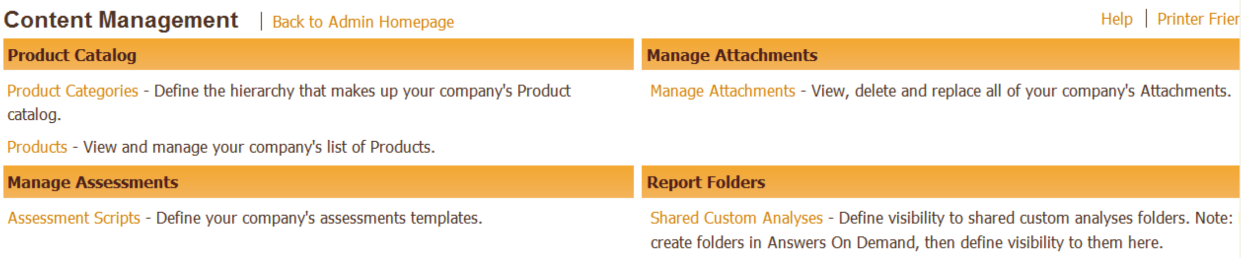
Lead Conversion Layout: Test Lead Conversio... | Back to Lead Conversion Layout List

Confirm

Confirm your selections of Lead Conversion Selected Actions for each Lead Conversion Record Type and then click Finish to complete defining the Layout.

Lead Conversion Record Types	Lead Conversion Selected Actions
Account	Use Existing Account
Contact	Use Existing Contact
Opportunity	
Deal Registration	

Chapter 07 Images



Content Management | Back to Admin Homepage

Product Catalog

Product Categories - Define the hierarchy that makes up your company's Product catalog.

Products - View and manage your company's list of Products.

Manage Assessments

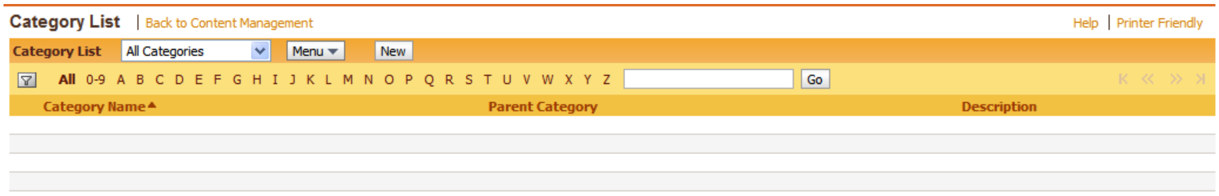
Assessment Scripts - Define your company's assessments templates.

Manage Attachments

Manage Attachments - View, delete and replace all of your company's Attachments.

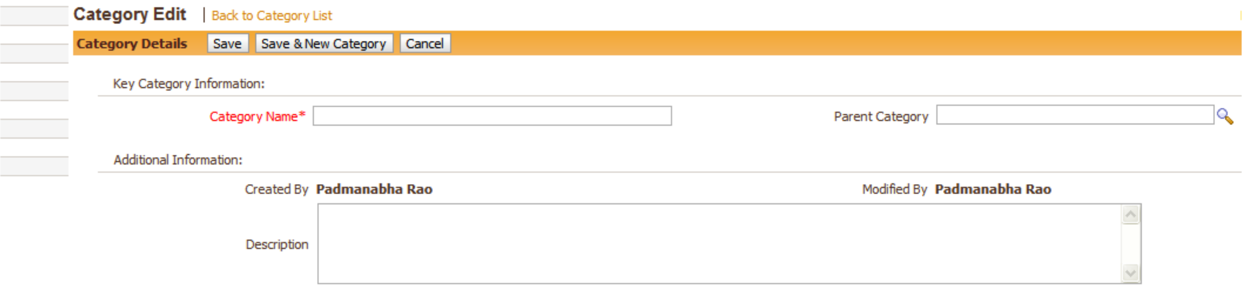
Report Folders

Shared Custom Analyses - Define visibility to shared custom analyses folders. Note: create folders in Answers On Demand, then define visibility to them here.



Category List | Back to Content Management

Category Name	Parent Category	Description



Category Edit | Back to Category List

Key Category Information:

Category Name*

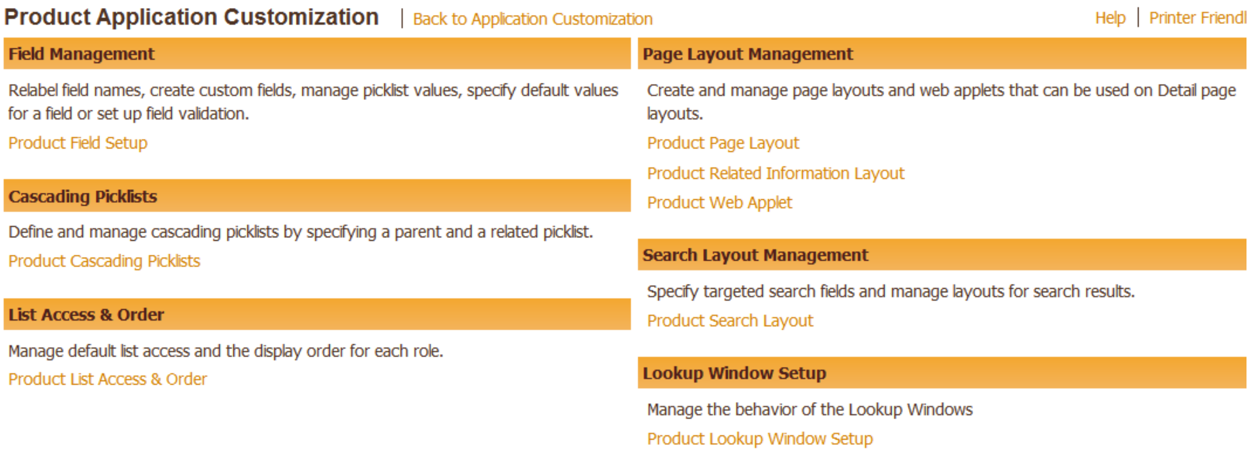
Parent Category

Additional Information:

Created By **Padmanabha Rao**

Modified By **Padmanabha Rao**

Description



Product Application Customization

Back to Application Customization | Help | Printer Friendl

Field Management

Relabel field names, create custom fields, manage picklist values, specify default values for a field or set up field validation.

Product Field Setup

Cascading Picklists

Define and manage cascading picklists by specifying a parent and a related picklist.

Product Cascading Picklists

List Access & Order

Manage default list access and the display order for each role.

Product List Access & Order

Page Layout Management

Create and manage page layouts and web applets that can be used on Detail page layouts.

Product Page Layout

Product Related Information Layout

Product Web Applet

Search Layout Management

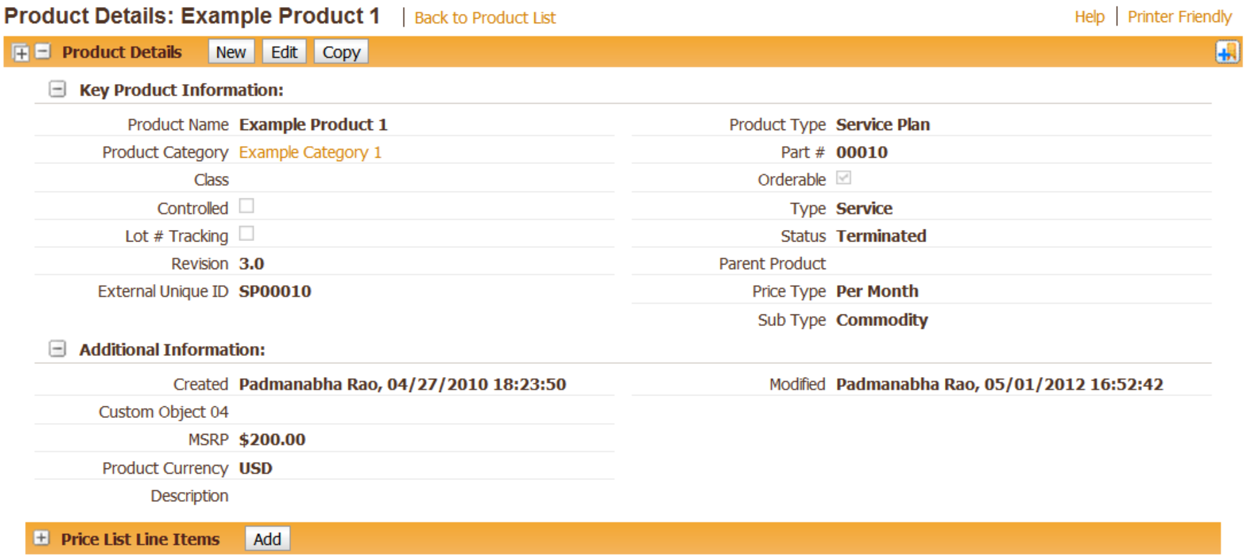
Specify targeted search fields and manage layouts for search results.

Product Search Layout

Lookup Window Setup

Manage the behavior of the Lookup Windows

Product Lookup Window Setup



Product Details: Example Product 1

Back to Product List | Help | Printer Friendly

Product Details

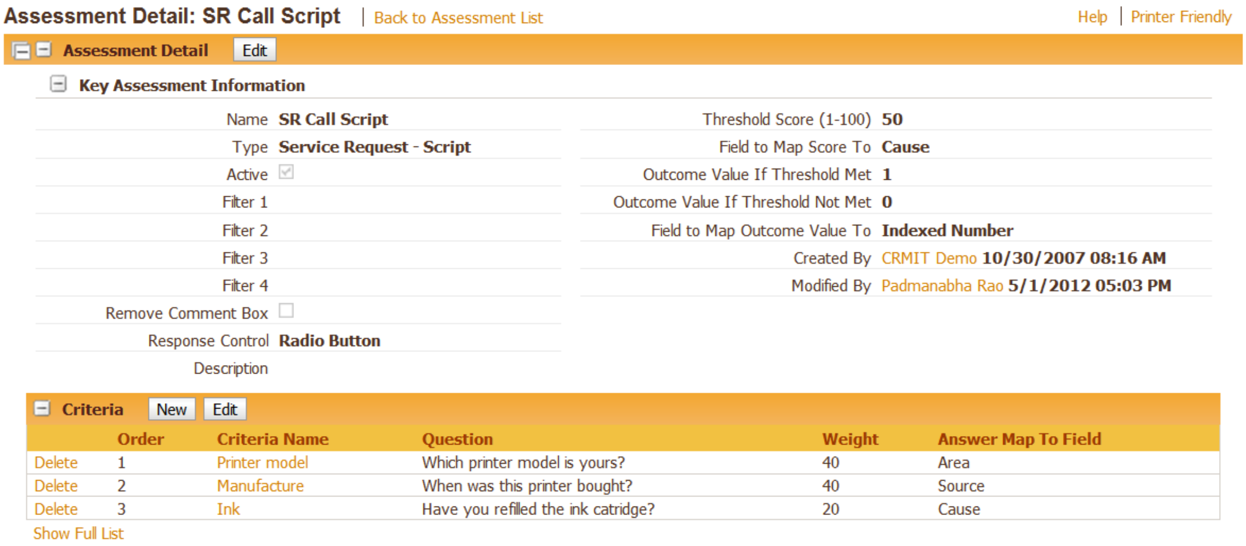
Key Product Information:

Product Name	**Example Product 1**	Product Type	**Service Plan**
Product Category	Example Category 1	Part #	**00010**
Class		Orderable	☑
Controlled	☐	Type	**Service**
Lot # Tracking	☐	Status	**Terminated**
Revision	**3.0**	Parent Product	
External Unique ID	**SP00010**	Price Type	**Per Month**
		Sub Type	**Commodity**

Additional Information:

Created	**Padmanabha Rao, 04/27/2010 18:23:50**	Modified	**Padmanabha Rao, 05/01/2012 16:52:42**
Custom Object 04			
MSRP	**$200.00**		
Product Currency	**USD**		
Description			

Price List Line Items



Assessment Detail: SR Call Script | Back to Assessment List

Assessment Detail

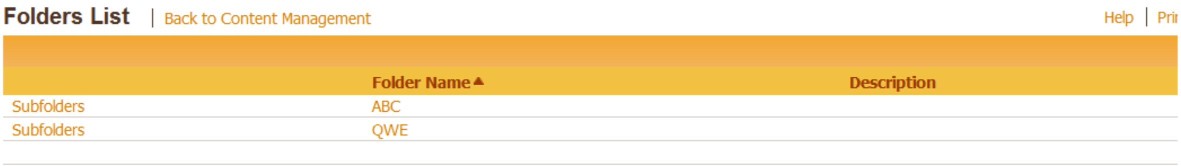
Key Assessment Information

Name	**SR Call Script**	Threshold Score (1-100)	**50**
Type	**Service Request - Script**	Field to Map Score To	**Cause**
Active	☑	Outcome Value If Threshold Met	**1**
Filter 1		Outcome Value If Threshold Not Met	**0**
Filter 2		Field to Map Outcome Value To	**Indexed Number**
Filter 3		Created By	CRMIT Demo **10/30/2007 08:16 AM**
Filter 4		Modified By	Padmanabha Rao **5/1/2012 05:03 PM**
Remove Comment Box	☐		
Response Control	**Radio Button**		
Description			

Criteria

	Order	Criteria Name	Question	Weight	Answer Map To Field
Delete	1	Printer model	Which printer model is yours?	40	Area
Delete	2	Manufacture	When was this printer bought?	40	Source
Delete	3	Ink	Have you refilled the ink catridge?	20	Cause

Show Full List



Folders List | Back to Content Management

	Folder Name ▲	Description
Subfolders	ABC	
Subfolders	QWE	

Folder Details: ABC | Back to Folders List

Folder Details

Define folder visibility by associating one or more user roles to folder. Visibility is public until first role is associated to folder. Admin role has visibility to folder at all times.

Key Folder Information

Folder Name **ABC** Parent Folder

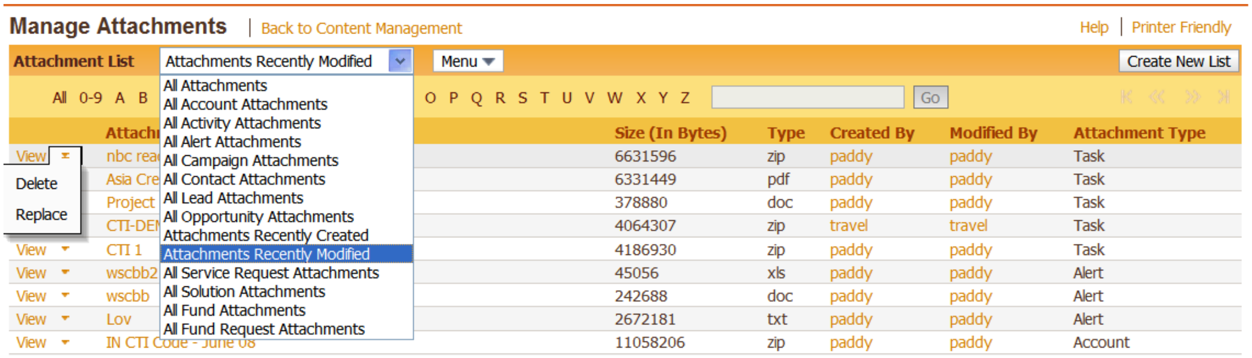
Additional Information

Description

Associated Roles

	Role Name
Remove	Inside Sales Rep

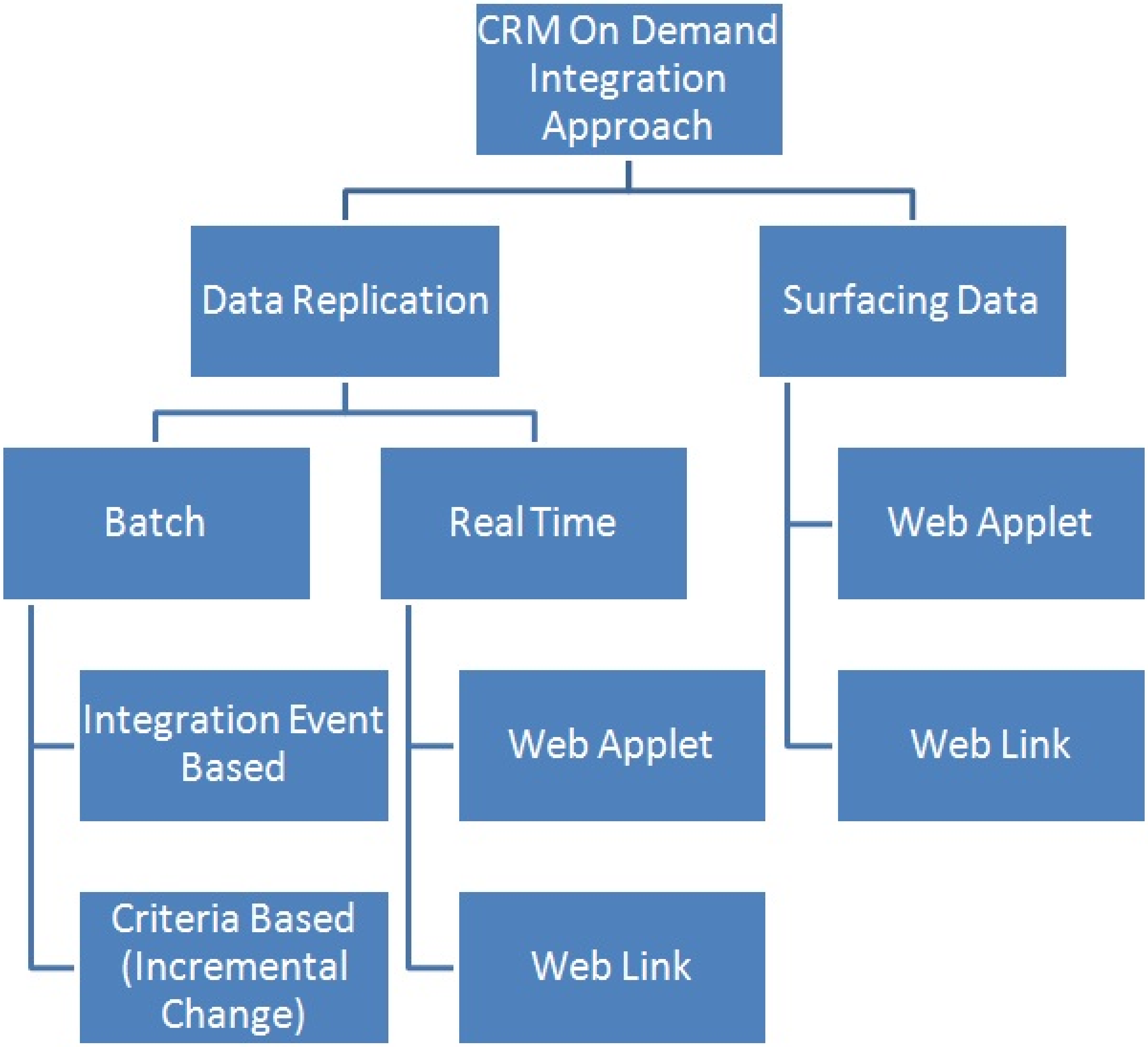
Show Full List

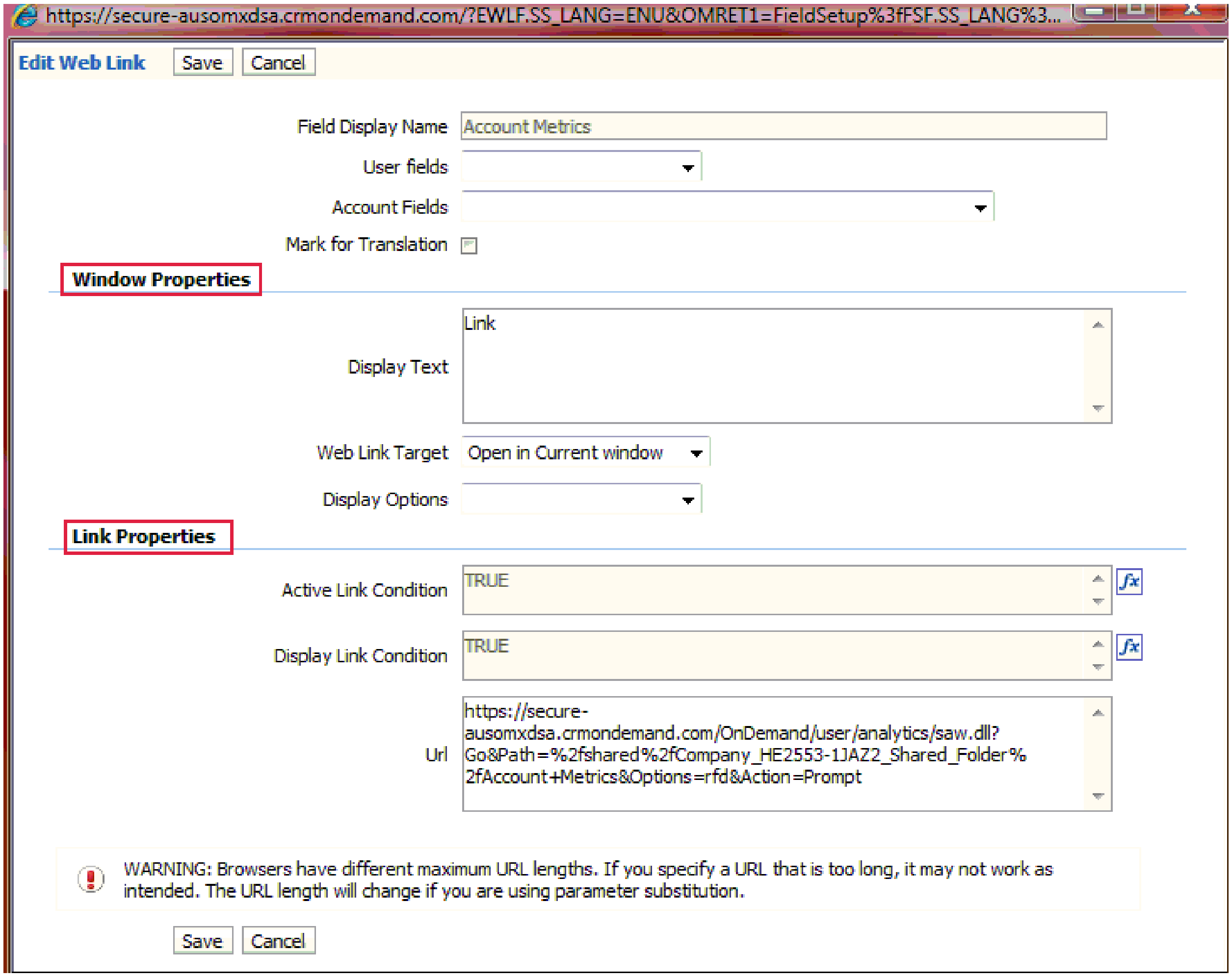


Manage Attachments | Back to Content Management

	Attachi	Size (In Bytes)	Type	Created By	Modified By	Attachment Type
View	nbc rea	6631596	zip	paddy	paddy	Task
	Asia Cre	6331449	pdf	paddy	paddy	Task
	Project	378880	doc	paddy	paddy	Task
	CTI-DEI	4064307	zip	travel	travel	Task
View	CTI 1	4186930	zip	paddy	paddy	Task
View	wscbb2	45056	xls	paddy	paddy	Alert
View	wscbb	242688	doc	paddy	paddy	Alert
View	Lov	2672181	txt	paddy	paddy	Alert
View	IN CTI Code - June 08	11058206	zip	paddy	paddy	Account

Chapter 08 Images





Field Display Name: Account Metrics

User fields:

Account Fields:

Mark for Translation ☐

Display Text: Link

Web Link Target: Open in Current window

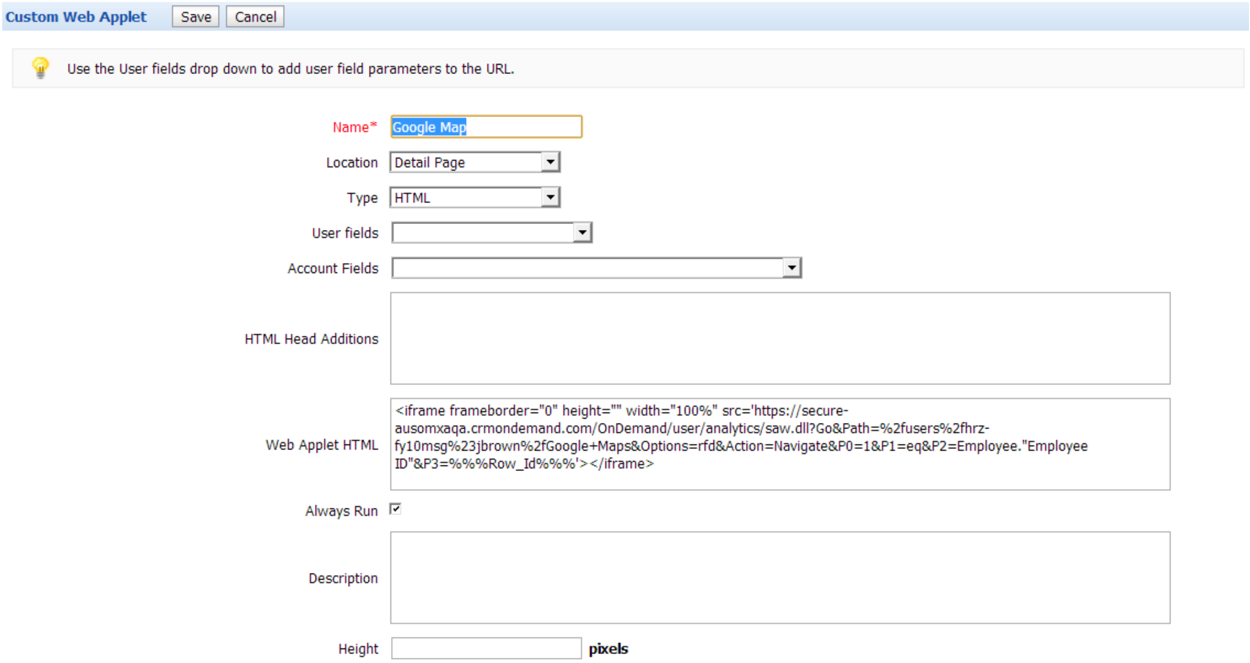
Display Options:

Active Link Condition: TRUE

Display Link Condition: TRUE

Url: https://secure-ausomxdsa.crmondemand.com/OnDemand/user/analytics/saw.dll?Go&Path=%2fshared%2fCompany_HE2553-1JAZ2_Shared_Folder%2fAccount+Metrics&Options=rfd&Action=Prompt

WARNING: Browsers have different maximum URL lengths. If you specify a URL that is too long, it may not work as intended. The URL length will change if you are using parameter substitution.



Use the User fields drop down to add user field parameters to the URL.

Name*: Google Map

Location: Detail Page

Type: HTML

User fields:

Account Fields:

HTML Head Additions:

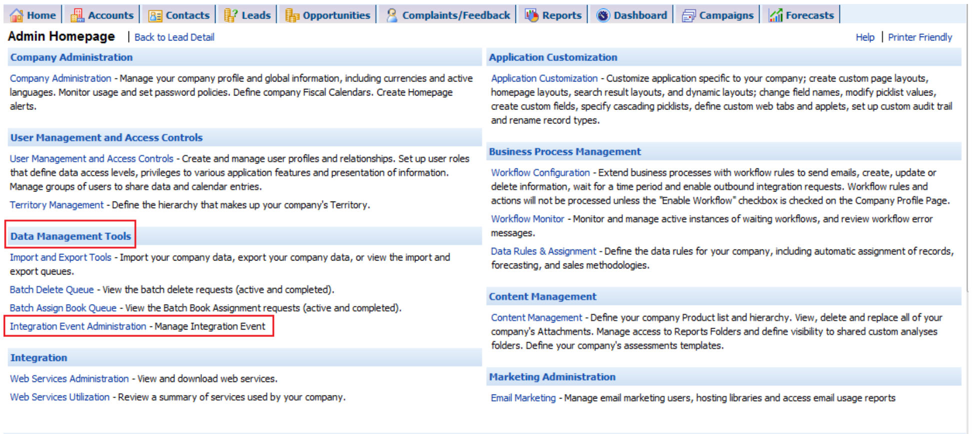
Web Applet HTML:

```
<iframe frameborder="0" height="" width="100%" src='https://secure-
ausomxaqa.crmondemand.com/OnDemand/user/analytics/saw.dll?Go&Path=%2fusers%2fhrz-
fy10msg%23jbrown%2fGoogle+Maps&Options=rfd&Action=Navigate&P0=1&P1=eq&P2=Employee."Employee
ID"&P3=%%%Row_Id%%%'></iframe>
```

Always Run ☑

Description:

Height: pixels



Admin Homepage | Back to Lead Detail

Company Administration

Company Administration - Manage your company profile and global information, including currencies and active languages. Monitor usage and set password policies. Define company Fiscal Calendars. Create Homepage alerts.

User Management and Access Controls

User Management and Access Controls - Create and manage user profiles and relationships. Set up user roles that define data access levels, privileges to various application features and presentation of information. Manage groups of users to share data and calendar entries.

Territory Management - Define the hierarchy that makes up your company's Territory.

Data Management Tools

Import and Export Tools - Import your company data, export your company data, or view the import and export queues.

Batch Delete Queue - View the batch delete requests (active and completed).

Batch Assign Book Queue - View the Batch Book Assignment requests (active and completed).

Integration Event Administration - Manage Integration Event

Integration

Web Services Administration - View and download web services.

Web Services Utilization - Review a summary of services used by your company.

Application Customization

Application Customization - Customize application specific to your company; create custom page layouts, homepage layouts, search result layouts, and dynamic layouts; change field names, modify picklist values, create custom fields, specify cascading picklists, define custom web tabs and applets, set up custom audit trail and rename record types.

Business Process Management

Workflow Configuration - Extend business processes with workflow rules to send emails, create, update or delete information, wait for a time period and enable outbound integration requests. Workflow rules and actions will not be processed unless the "Enable Workflow" checkbox is checked on the Company Profile Page.

Workflow Monitor - Monitor and manage active instances of waiting workflows, and review workflow error messages.

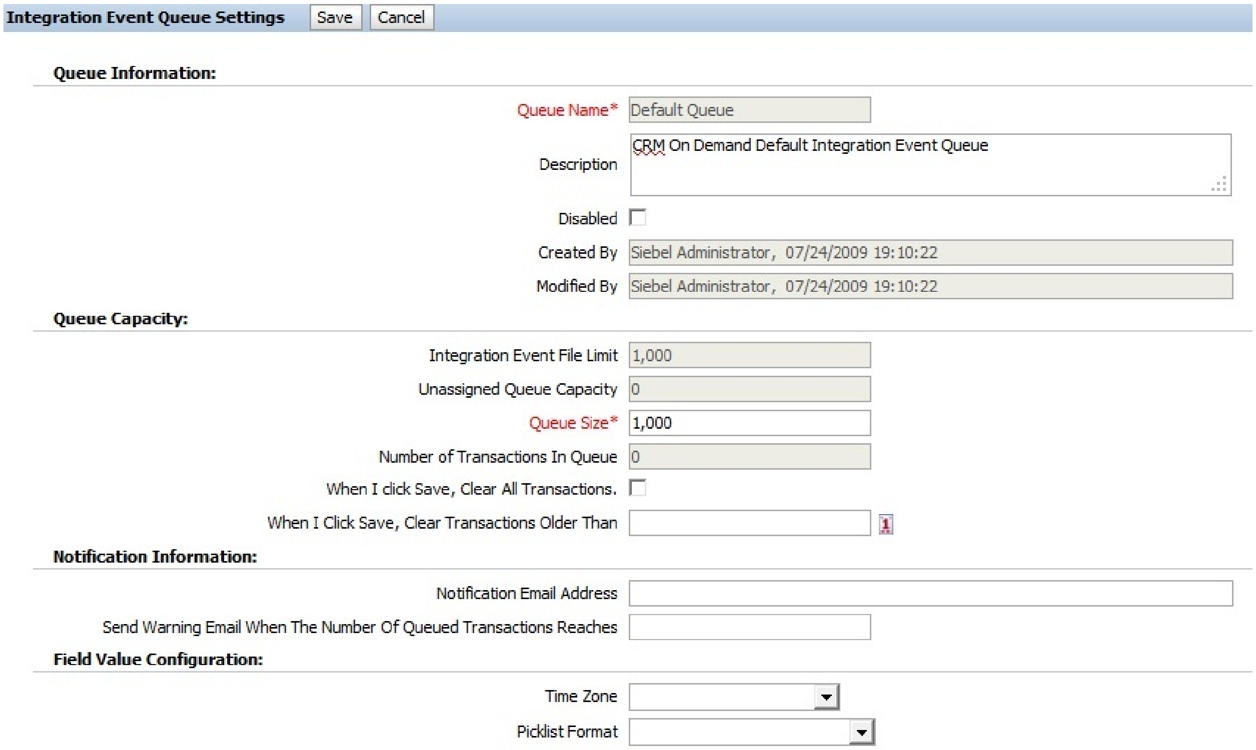
Data Rules & Assignment - Define the data rules for your company, including automatic assignment of records, forecasting, and sales methodologies.

Content Management

Content Management - Define your company Product list and hierarchy. View, delete and replace all of your company's Attachments. Manage access to Reports Folders and define visibility to shared custom analyses folders. Define your company's assessments templates.

Marketing Administration

Email Marketing - Manage email marketing users, hosting libraries and access email usage reports



Integration Event Queue Settings

Queue Information:

Queue Name* Default Queue

Description CRM On Demand Default Integration Event Queue

Disabled ☐

Created By Siebel Administrator, 07/24/2009 19:10:22

Modified By Siebel Administrator, 07/24/2009 19:10:22

Queue Capacity:

Integration Event File Limit 1,000

Unassigned Queue Capacity 0

Queue Size* 1,000

Number of Transactions In Queue 0

When I click Save, Clear All Transactions. ☐

When I Click Save, Clear Transactions Older Than

Notification Information:

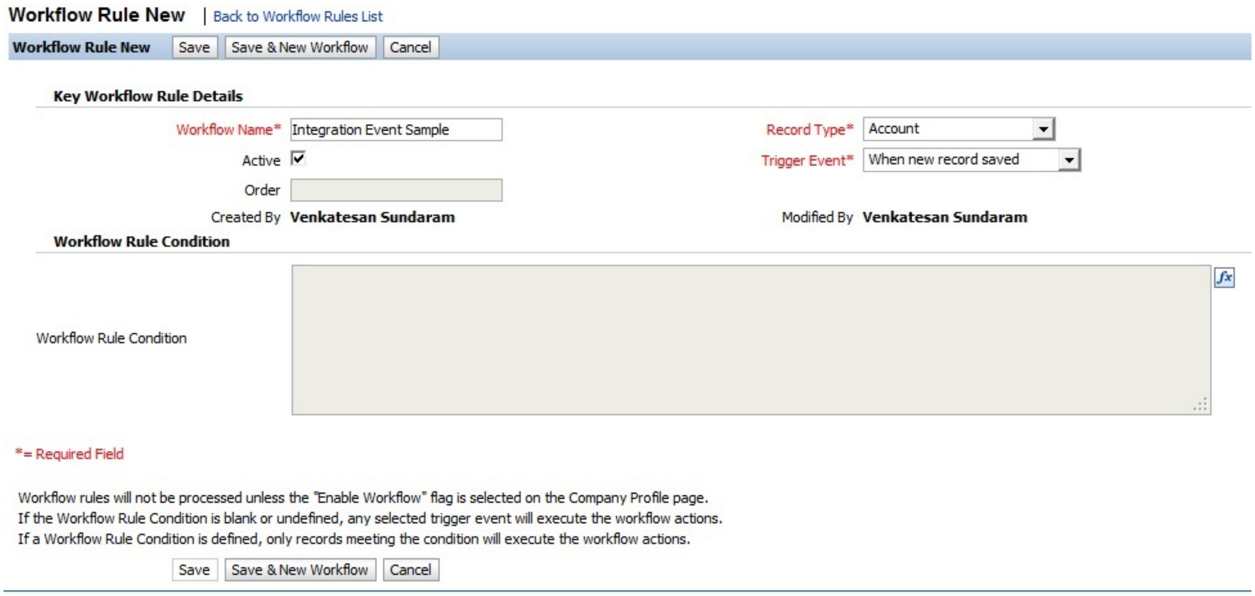
Notification Email Address

Send Warning Email When The Number Of Queued Transactions Reaches

Field Value Configuration:

Time Zone

Picklist Format



Key Workflow Rule Details

Workflow Name* Integration Event Sample

Active ☑

Order

Created By **Venkatesan Sundaram**

Record Type* Account

Trigger Event* When new record saved

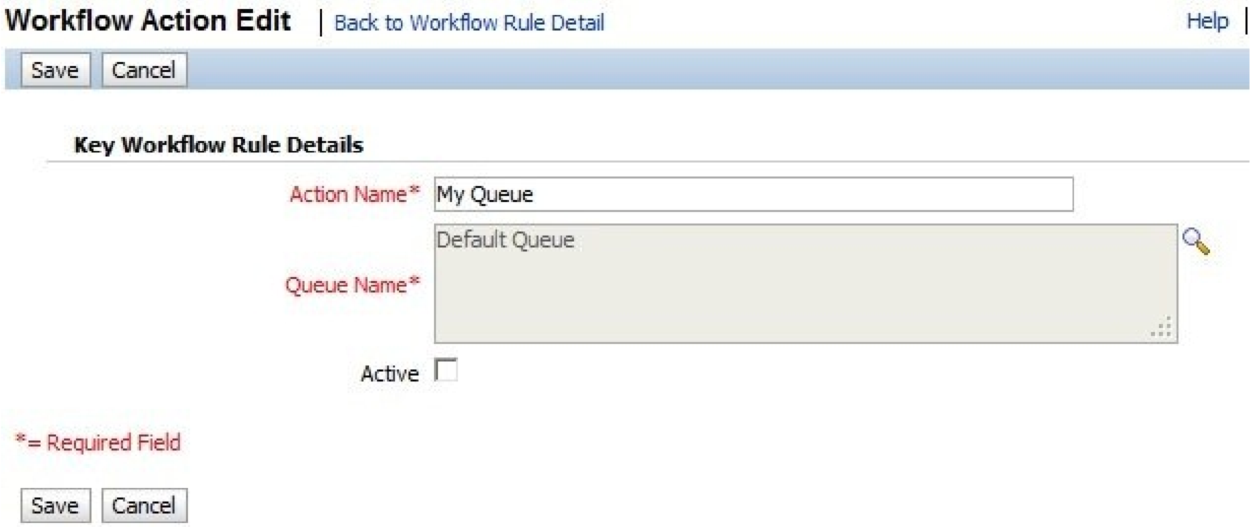
Modified By **Venkatesan Sundaram**

Workflow Rule Condition

Workflow Rule Condition

*= Required Field

Workflow rules will not be processed unless the "Enable Workflow" flag is selected on the Company Profile page.
If the Workflow Rule Condition is blank or undefined, any selected trigger event will execute the workflow actions.
If a Workflow Rule Condition is defined, only records meeting the condition will execute the workflow actions.



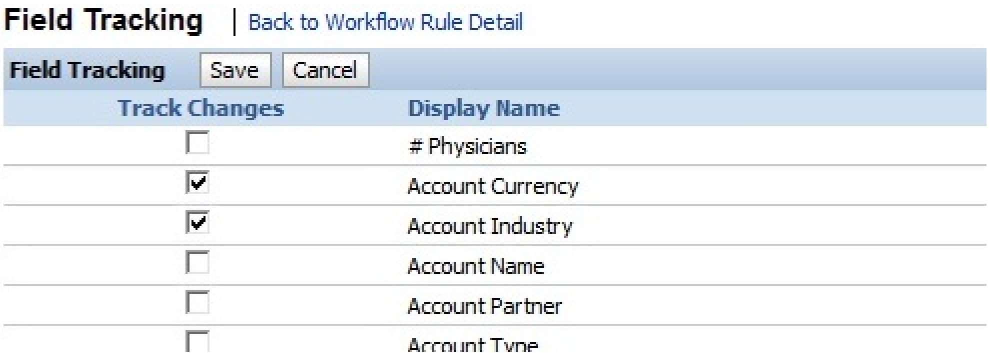
Key Workflow Rule Details

Action Name* My Queue

Queue Name* Default Queue

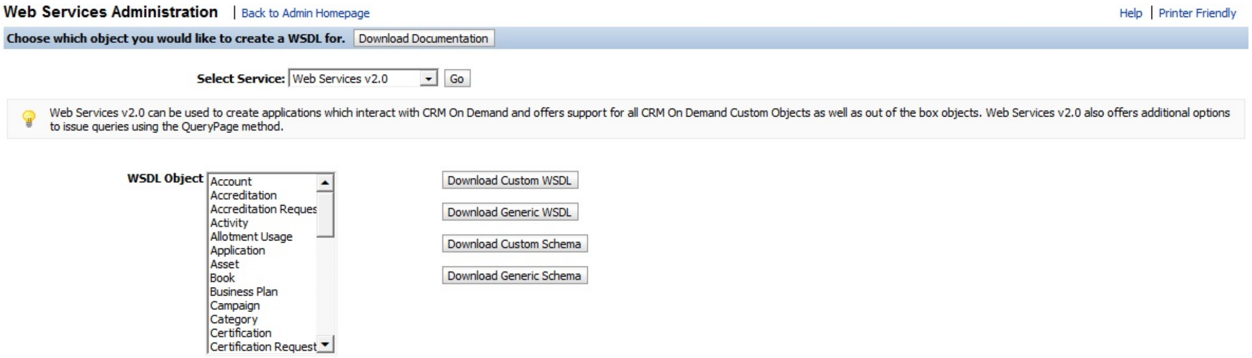
Active ☐

*= Required Field



Track Changes	Display Name
☐	# Physicians
☑	Account Currency
☑	Account Industry
☐	Account Name
☐	Account Partner
☐	Account Type

☑	Integration: Web Services	Enable Web Services Access	Enable the ability to send Web services requests.
☑	Integration: Web Services	Manage Access to Web Services	Manage access to Enable Web Services Access privilege.

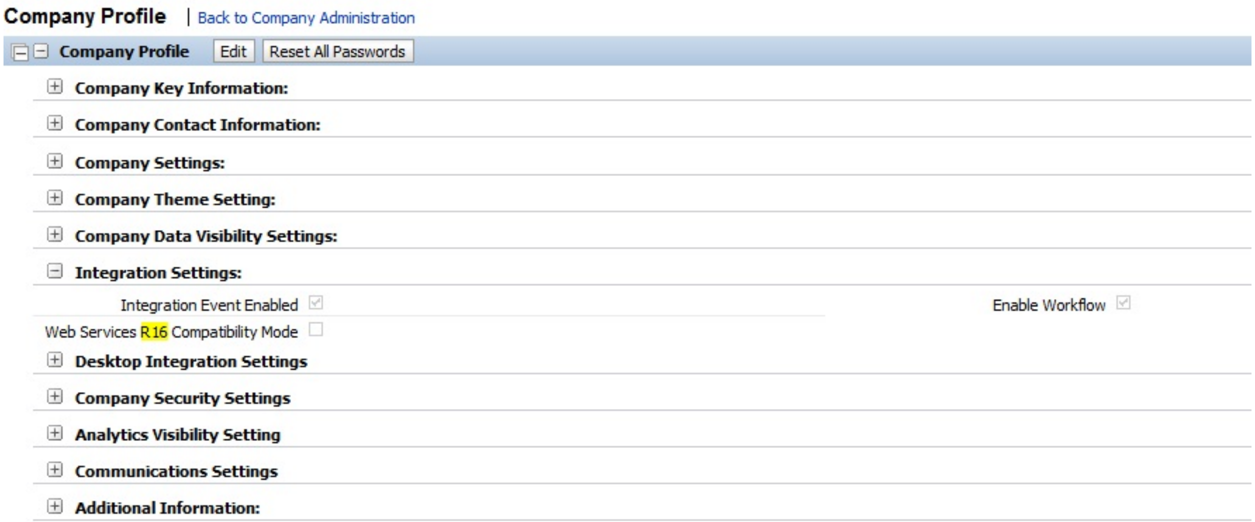


Choose which object you would like to create a WSDL for.

Select Service: Web Services v2.0

Web Services v2.0 can be used to create applications which interact with CRM On Demand and offers support for all CRM On Demand Custom Objects as well as out of the box objects. Web Services v2.0 also offers additional options to issue queries using the QueryPage method.

WSDL Object
- Account
- Accreditation
- Accreditation Reques
- Activity
- Allotment Usage
- Application
- Asset
- Book
- Business Plan
- Campaign
- Category
- Certification
- Certification Request



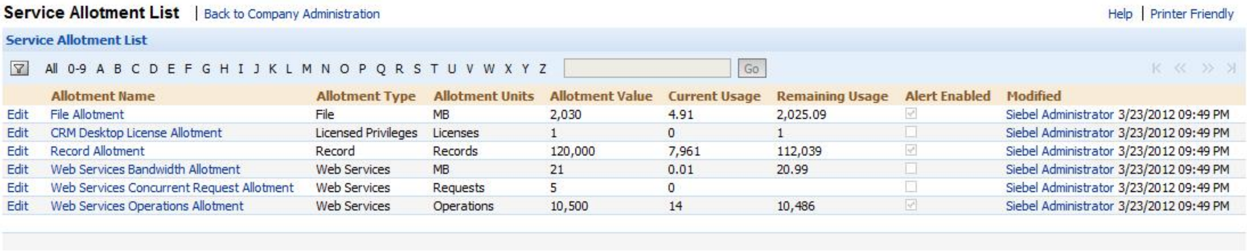
Company Profile

- **Company Key Information:**
- **Company Contact Information:**
- **Company Settings:**
- **Company Theme Setting:**
- **Company Data Visibility Settings:**
- **Integration Settings:**

Integration Event Enabled ☑ Enable Workflow ☑

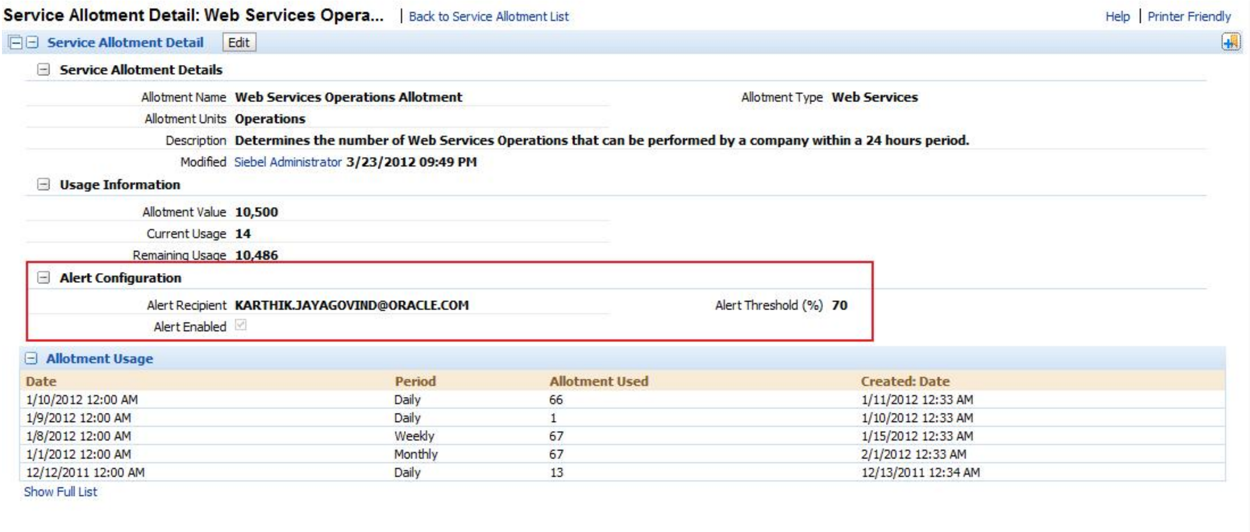
Web Services R16 Compatibility Mode ☐

- **Desktop Integration Settings**
- **Company Security Settings**
- **Analytics Visibility Setting**
- **Communications Settings**
- **Additional Information:**



Service Allotment List

	Allotment Name	Allotment Type	Allotment Units	Allotment Value	Current Usage	Remaining Usage	Alert Enabled	Modified
Edit	File Allotment	File	MB	2,030	4.91	2,025.09	☑	Siebel Administrator 3/23/2012 09:49 PM
Edit	CRM Desktop License Allotment	Licensed Privileges	Licenses	1	0	1	☐	Siebel Administrator 3/23/2012 09:49 PM
Edit	Record Allotment	Record	Records	120,000	7,961	112,039	☑	Siebel Administrator 3/23/2012 09:49 PM
Edit	Web Services Bandwidth Allotment	Web Services	MB	21	0.01	20.99	☐	Siebel Administrator 3/23/2012 09:49 PM
Edit	Web Services Concurrent Request Allotment	Web Services	Requests	5	0		☐	Siebel Administrator 3/23/2012 09:49 PM
Edit	Web Services Operations Allotment	Web Services	Operations	10,500	14	10,486	☑	Siebel Administrator 3/23/2012 09:49 PM



Service Allotment Details

Allotment Name **Web Services Operations Allotment**
Allotment Type **Web Services**
Allotment Units **Operations**
Description **Determines the number of Web Services Operations that can be performed by a company within a 24 hours period.**
Modified Siebel Administrator **3/23/2012 09:49 PM**

Usage Information

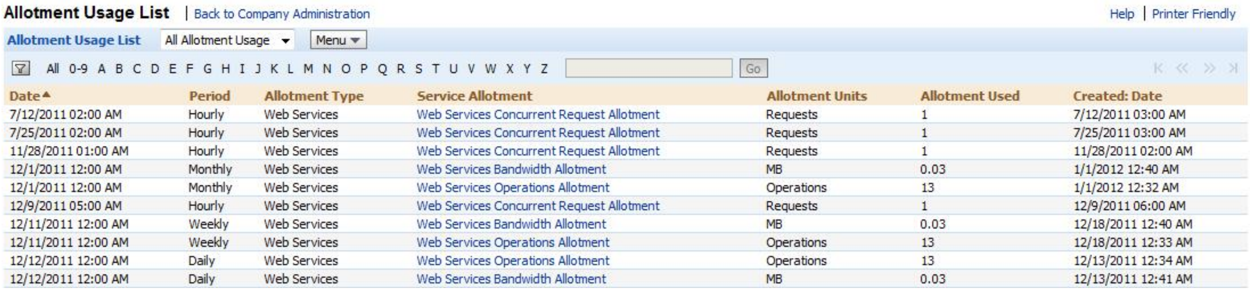
Allotment Value **10,500**
Current Usage **14**
Remaining Usage **10,486**

Alert Configuration

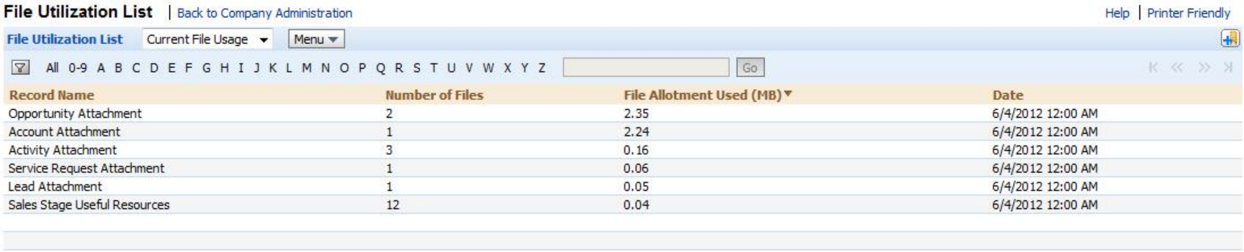
Alert Recipient **KARTHIK.JAYAGOVIND@ORACLE.COM**
Alert Threshold (%) **70**
Alert Enabled ☑

Allotment Usage

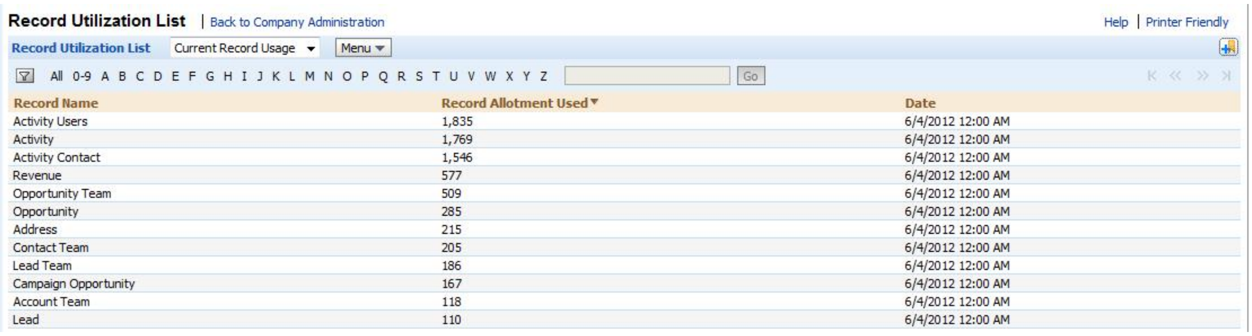
Date	Period	Allotment Used	Created: Date
1/10/2012 12:00 AM	Daily	66	1/11/2012 12:33 AM
1/9/2012 12:00 AM	Daily	1	1/10/2012 12:33 AM
1/8/2012 12:00 AM	Weekly	67	1/15/2012 12:33 AM
1/1/2012 12:00 AM	Monthly	67	2/1/2012 12:33 AM
12/12/2011 12:00 AM	Daily	13	12/13/2011 12:34 AM



Date	Period	Allotment Type	Service Allotment	Allotment Units	Allotment Used	Created: Date
7/12/2011 02:00 AM	Hourly	Web Services	Web Services Concurrent Request Allotment	Requests	1	7/12/2011 03:00 AM
7/25/2011 02:00 AM	Hourly	Web Services	Web Services Concurrent Request Allotment	Requests	1	7/25/2011 03:00 AM
11/28/2011 01:00 AM	Hourly	Web Services	Web Services Concurrent Request Allotment	Requests	1	11/28/2011 02:00 AM
12/1/2011 12:00 AM	Monthly	Web Services	Web Services Bandwidth Allotment	MB	0.03	1/1/2012 12:40 AM
12/1/2011 12:00 AM	Monthly	Web Services	Web Services Operations Allotment	Operations	13	1/1/2012 12:32 AM
12/9/2011 05:00 AM	Hourly	Web Services	Web Services Concurrent Request Allotment	Requests	1	12/9/2011 06:00 AM
12/11/2011 12:00 AM	Weekly	Web Services	Web Services Bandwidth Allotment	MB	0.03	12/18/2011 12:40 AM
12/11/2011 12:00 AM	Weekly	Web Services	Web Services Operations Allotment	Operations	13	12/18/2011 12:33 AM
12/12/2011 12:00 AM	Daily	Web Services	Web Services Operations Allotment	Operations	13	12/13/2011 12:34 AM
12/12/2011 12:00 AM	Daily	Web Services	Web Services Bandwidth Allotment	MB	0.03	12/13/2011 12:41 AM



Record Name	Number of Files	File Allotment Used (MB)	Date
Opportunity Attachment	2	2.35	6/4/2012 12:00 AM
Account Attachment	1	2.24	6/4/2012 12:00 AM
Activity Attachment	3	0.16	6/4/2012 12:00 AM
Service Request Attachment	1	0.06	6/4/2012 12:00 AM
Lead Attachment	1	0.05	6/4/2012 12:00 AM
Sales Stage Useful Resources	12	0.04	6/4/2012 12:00 AM



Record Name	Record Allotment Used	Date
Activity Users	1,835	6/4/2012 12:00 AM
Activity	1,769	6/4/2012 12:00 AM
Activity Contact	1,546	6/4/2012 12:00 AM
Revenue	577	6/4/2012 12:00 AM
Opportunity Team	509	6/4/2012 12:00 AM
Opportunity	285	6/4/2012 12:00 AM
Address	215	6/4/2012 12:00 AM
Contact Team	205	6/4/2012 12:00 AM
Lead Team	186	6/4/2012 12:00 AM
Campaign Opportunity	167	6/4/2012 12:00 AM
Account Team	118	6/4/2012 12:00 AM
Lead	110	6/4/2012 12:00 AM

Chapter 09 Images


RM ON DEMAND
Training and Support
Admin
My Setup
Deleted Items
Help
Sign Out
Calendar
Campaigns
Leads
Opportunities
Accounts
Contacts
Service
Reports
Dashboard

Reports Homepage | Book: Padmanabha Rao (CRM...

Custom Reports and Analyses

My Analyses - View Private Analyses.
Shared Custom Analyses - View Custom Shared Analyses.
Design Analyses - Create a new analysis, edit an existing analysis, or manage analysis properties.

Quick Lists

Opportunities By Account - View a list of all of your Opportunities by account.
Opportunities By Sales Stage - View a list of all of your opportunities by Sales Stage.
Activities By Opportunity - Create and evaluate a list of all of your activities by opportunity.
Accounts By Sales Rep - View a list of all of your Accounts by Sales Representative.
Contact Mailing List - View and print a mailing list of all of your contacts by account.
Employee List - View a full list of your company's On Demand users.

Pipeline Analysis

Pipeline Analysis - Perform comprehensive analysis on your pipeline to identify opportunities and challenges.
Opportunity Revenue Analysis - Perform quick analysis on your Opportunity Revenue.
Pipeline Quality Analysis - Evaluate the quality of your deals and identify key deals that can be targeted and closed quickly.
Team Pipeline Analysis - Perform comprehensive deal analysis by subordinate.
Top 10 Opportunities - View and analyze your top deals.
Historical Pipeline Analysis - Perform comprehensive historical analysis to evaluate current performance vs. past expectations.
Historical Expected Revenue Quarterly Analysis - Compare historical expected revenue achievements against current achievements.
Historical Opportunity Revenue Quarterly Analysis - Compare historical opportunity revenue achievements against current achievements.
Quarterly Closed Revenue Analysis - Compare closed revenue achievements from last quarter against current achievements.
Opportunity vs. Expected Revenue vs. Closed Revenue - Get immediate insight in one view into your quarterly revenue performance.
Sales Stage History Analysis - Analyze pipeline velocity and other sales stage history metrics.

Sales Effectiveness

Top Performers List - View, analyze, and identify your top performers across regions, industries, and so on.
Quarterly Sales Effectiveness Analysis - Perform quarter-to-quarter sales effectiveness analysis by subordinate.
Team Sales Effectiveness Analysis - Perform incisive sales effectiveness analysis by subordinate.
Team Activity Analysis - Analyze comprehensive team activity to improve team productivity.
Team Win Rate Analysis - Evaluate team win rate effectiveness.
Team Average Sales Cycle Analysis - Analyze team Average Sales Cycle effectiveness.

Customers

Number of Accounts Opportunity Analysis - Analyze your total number of accounts with opportunities by different demographics.
Number of Accounts Analysis - Analyze your total number of accounts by different demographics.
Contact Analysis by Opportunity - Analyze your total number of contacts with opportunities by multiple criteria.
Contact Analysis by Account - Analyze your total number of contacts by account criteria.
Top 10 Customers - View and analyze your top accounts.
Account Analysis - Perform comprehensive analysis on your accounts and customers.
Closed Revenue by Account Analysis - Analyze closed revenue achievements by account demographics.

Service

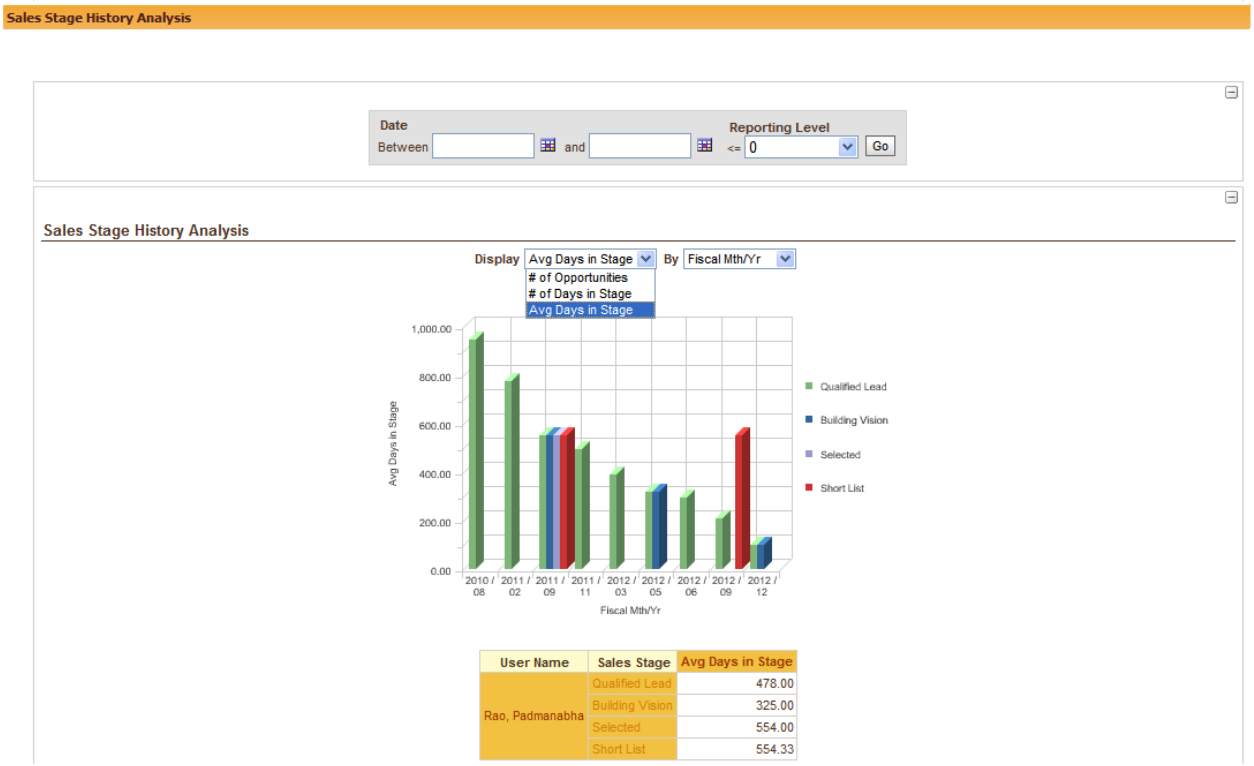
Service Analysis - Identify key service problems and track service trends in your area.
Service Report List - Review a list of your key service requests. Data is refreshed daily.
Current Service Request Aging Analysis - Analyze and manage the aging of your service requests.
Open Service Request Analysis - Evaluate and analyze your open service requests.
Number of Service Request Analysis - Evaluate and analyze your total number of service requests.
Team Service Analysis - Perform comprehensive service analysis by subordinate.

Marketing Effectiveness

Active Campaign Status - Analyze performance metrics for active campaigns.
Completed Campaign Results - Graph and compare specific performance metrics for completed campaigns.
Campaign Effectiveness by Campaign Name - Evaluate selected performance metrics for completed campaigns.
Campaign Effectiveness by Campaign Type - Evaluate selected performance metrics by Campaign Type for completed campaigns.
Lead Followup Analysis - Analyze lead aging, lead followup, and lead status trends.
Lead Source Analysis - Analyze lead volume trends by lead source.
Opportunity Source Analysis by Close Date - Track lead source trends for opportunities based upon opportunity close date.
Opportunity Source Analysis by Create Date - Track lead source trends for opportunities based upon opportunity create date.
Projected Revenue - Estimate future closed revenue based on past performance metrics.

Usage Tracking

Application Object Usage Analysis - Analyze object usage in your application.
User Adoption Analysis - Analyze user adoption of your application.
Setup and Configuration Overview - View summary of application setup and configuration details for your company.
User Logins By Role - View and analyze user logins by role.
User Logins By Top 25 Users - View and analyze your top user logins.
Top 10 Page Views - View and analyze the performance of top page views of your application.
Analytics Performance - Analyze the performance of your reporting and analytic queries and dashboards.

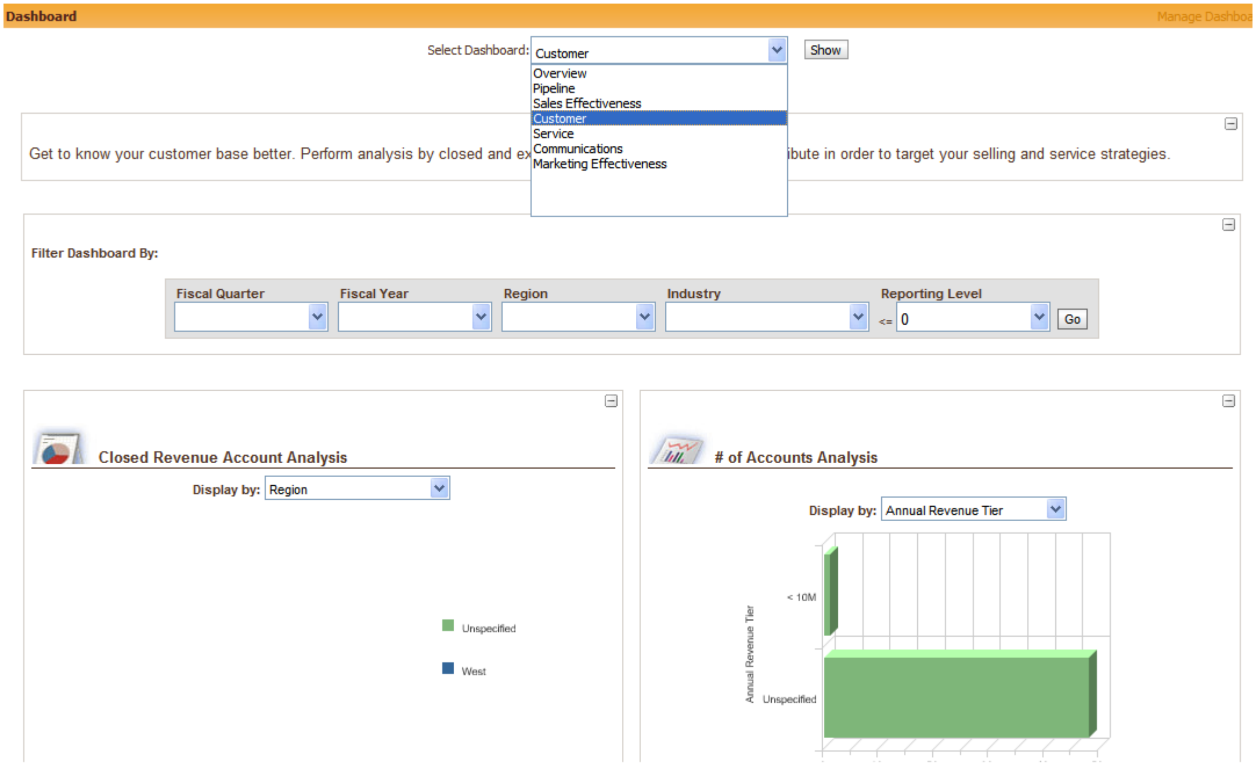


Sales Stage History Analysis

Reporting Level <= 0

Display: Avg Days in Stage By: Fiscal Mth/Yr

User Name	Sales Stage	Avg Days in Stage
Rao, Padmanabha	Qualified Lead	478.00
	Building Vision	325.00
	Selected	554.00
	Short List	554.33



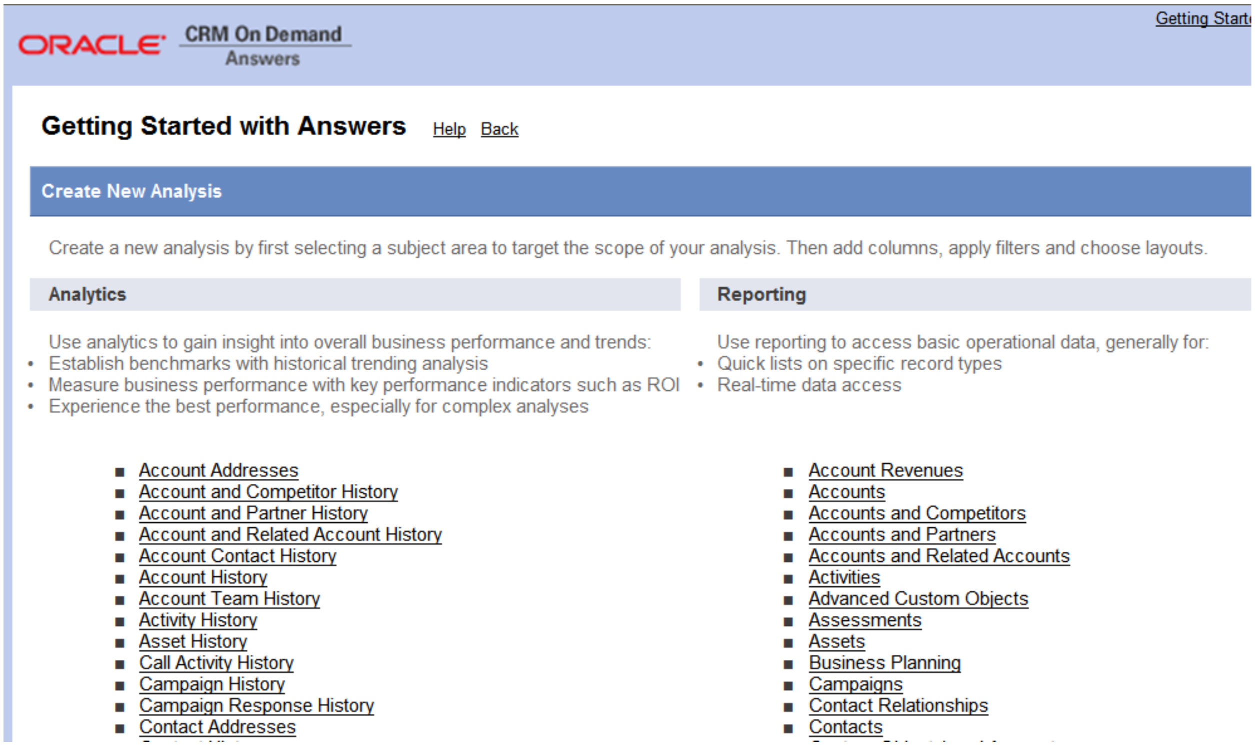
Select Dashboard: Customer

Get to know your customer base better. Perform analysis by closed and ex ibute in order to target your selling and service strategies.

Reporting Level <= 0

Display by: Region

Display by: Annual Revenue Tier



Getting Started with Answers

Create New Analysis

Create a new analysis by first selecting a subject area to target the scope of your analysis. Then add columns, apply filters and choose layouts.

Analytics

Use analytics to gain insight into overall business performance and trends:

- Establish benchmarks with historical trending analysis
- Measure business performance with key performance indicators such as ROI
- Experience the best performance, especially for complex analyses

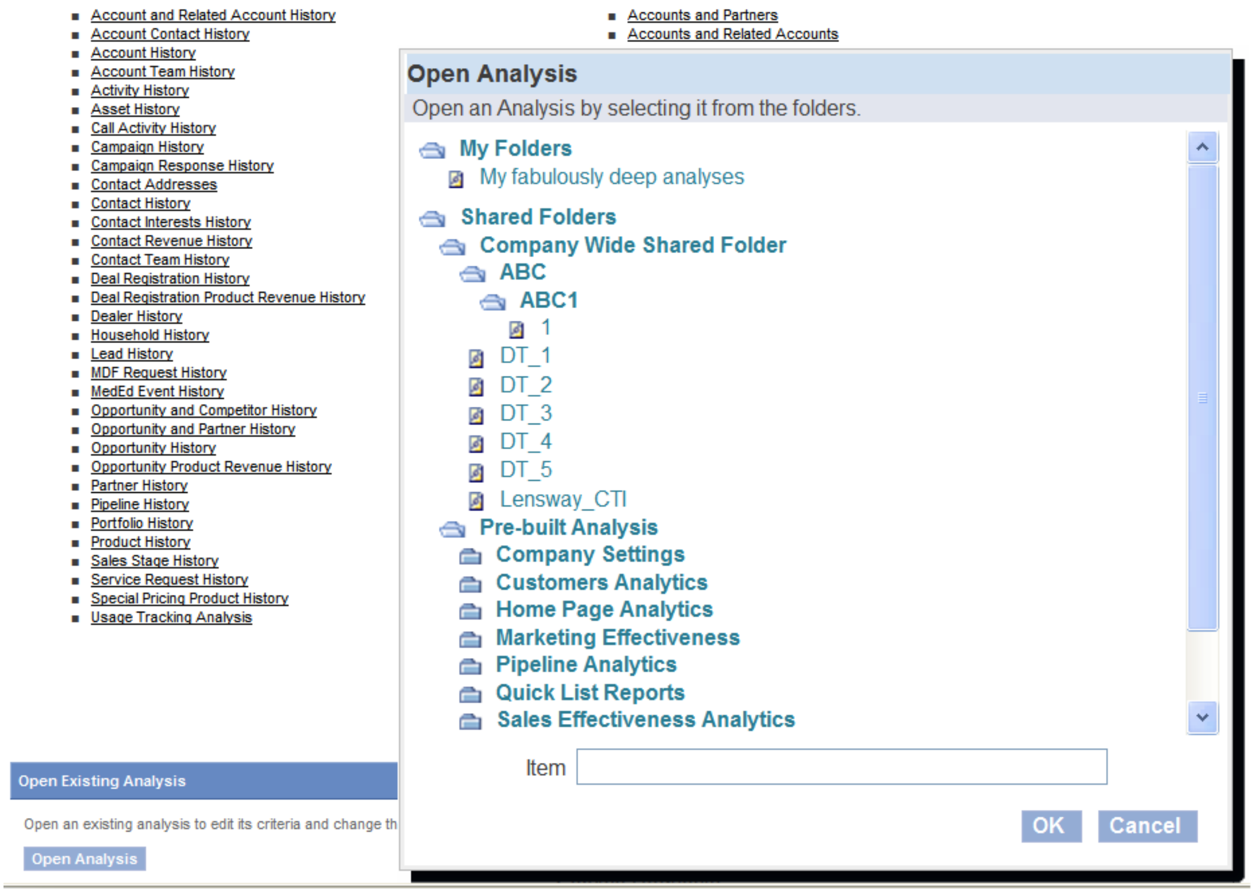
- Account Addresses
- Account and Competitor History
- Account and Partner History
- Account and Related Account History
- Account Contact History
- Account History
- Account Team History
- Activity History
- Asset History
- Call Activity History
- Campaign History
- Campaign Response History
- Contact Addresses

Reporting

Use reporting to access basic operational data, generally for:

- Quick lists on specific record types
- Real-time data access

- Account Revenues
- Accounts
- Accounts and Competitors
- Accounts and Partners
- Accounts and Related Accounts
- Activities
- Advanced Custom Objects
- Assessments
- Assets
- Business Planning
- Campaigns
- Contact Relationships
- Contacts



- Account and Related Account History
- Account Contact History
- Account History
- Account Team History
- Activity History
- Asset History
- Call Activity History
- Campaign History
- Campaign Response History
- Contact Addresses
- Contact History
- Contact Interests History
- Contact Revenue History
- Contact Team History
- Deal Registration History
- Deal Registration Product Revenue History
- Dealer History
- Household History
- Lead History
- MDF Request History
- MedEd Event History
- Opportunity and Competitor History
- Opportunity and Partner History
- Opportunity History
- Opportunity Product Revenue History
- Partner History
- Pipeline History
- Portfolio History
- Product History
- Sales Stage History
- Service Request History
- Special Pricing Product History
- Usage Tracking Analysis

- Accounts and Partners
- Accounts and Related Accounts

Open Analysis

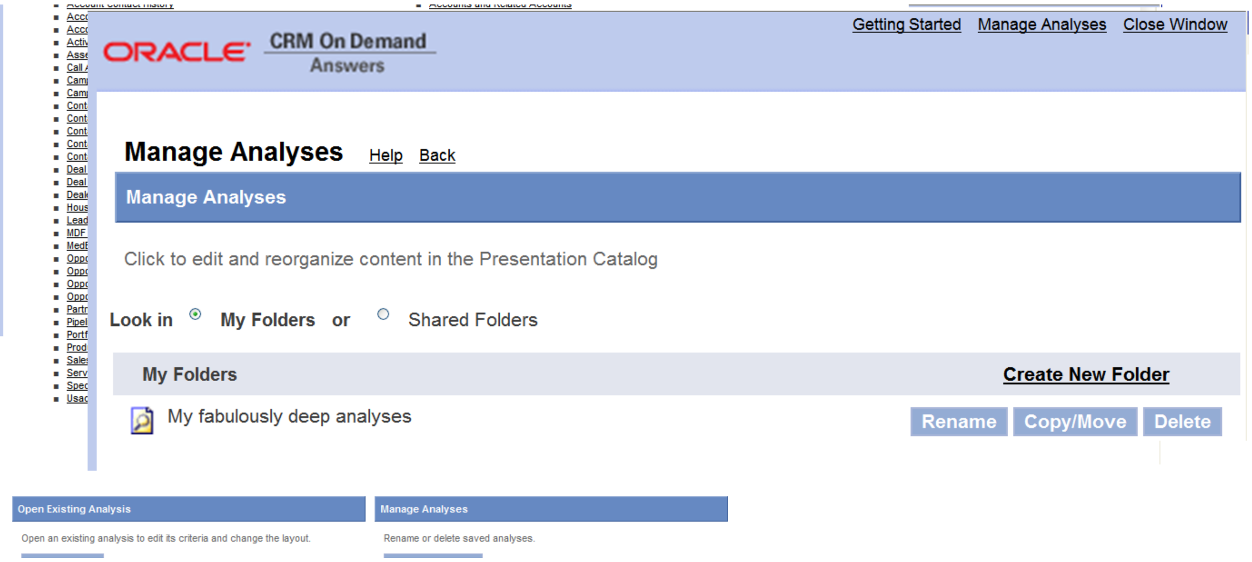
Open an Analysis by selecting it from the folders.

- My Folders
  - My fabulously deep analyses
- Shared Folders
  - Company Wide Shared Folder
    - ABC
      - ABC1
        - 1
      - DT_1
      - DT_2
      - DT_3
      - DT_4
      - DT_5
      - Lensway_CTI
  - Pre-built Analysis
    - Company Settings
    - Customers Analytics
    - Home Page Analytics
    - Marketing Effectiveness
    - Pipeline Analytics
    - Quick List Reports
    - Sales Effectiveness Analytics

Item

Open Existing Analysis

Open an existing analysis to edit its criteria and change th



Manage Analyses

Manage Analyses

Click to edit and reorganize content in the Presentation Catalog

Look in ● My Folders or ○ Shared Folders

My Folders

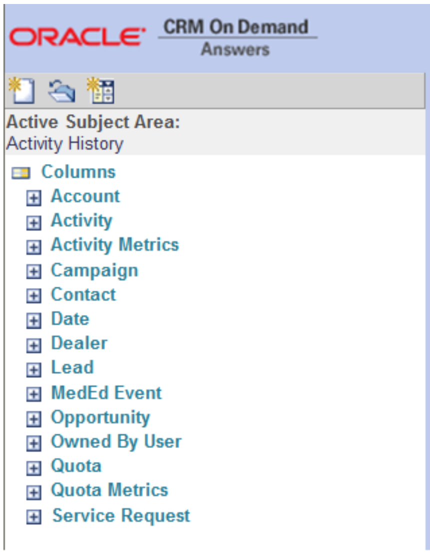
My fabulously deep analyses

Open Existing Analysis

Open an existing analysis to edit its criteria and change the layout.

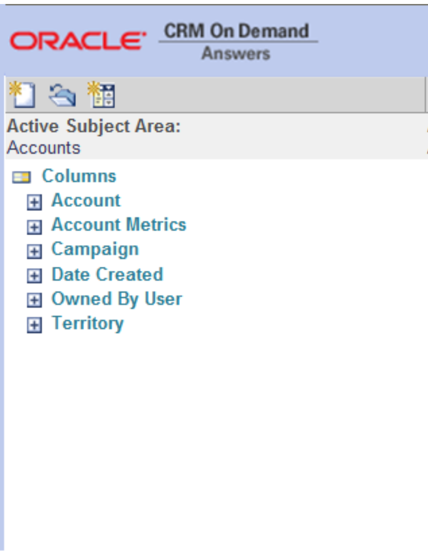
Manage Analyses

Rename or delete saved analyses.



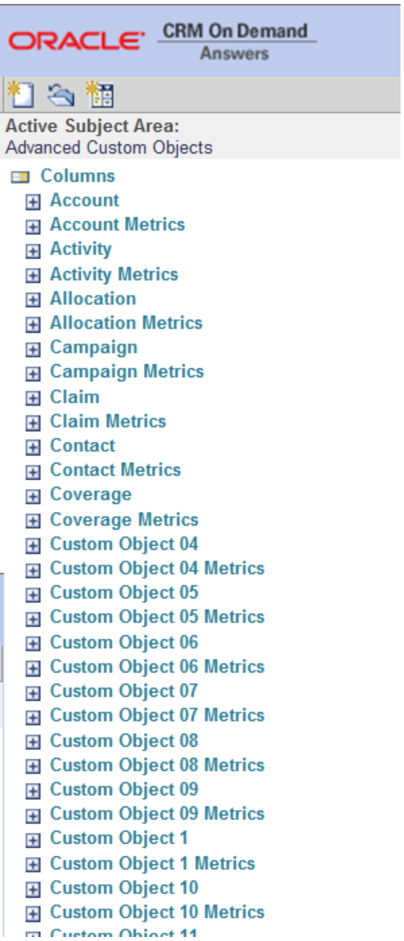
Active Subject Area:
Activity History

- Columns
  - Account
  - Activity
  - Activity Metrics
  - Campaign
  - Contact
  - Date
  - Dealer
  - Lead
  - MedEd Event
  - Opportunity
  - Owned By User
  - Quota
  - Quota Metrics
  - Service Request



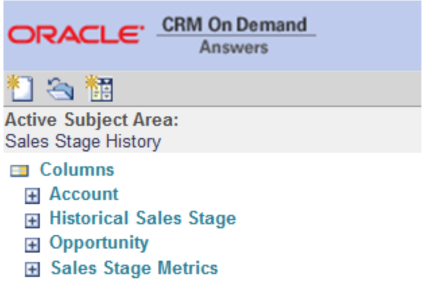
Active Subject Area:
Accounts

- Columns
  - Account
  - Account Metrics
  - Campaign
  - Date Created
  - Owned By User
  - Territory



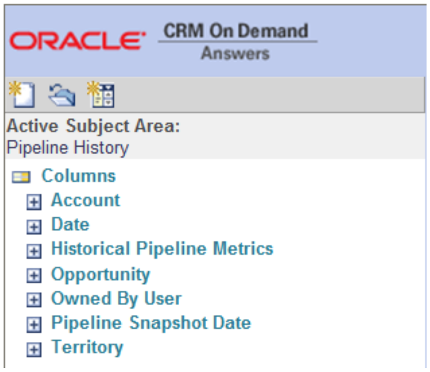
Active Subject Area:
Advanced Custom Objects

- Columns
  - Account
  - Account Metrics
  - Activity
  - Activity Metrics
  - Allocation
  - Allocation Metrics
  - Campaign
  - Campaign Metrics
  - Claim
  - Claim Metrics
  - Contact
  - Contact Metrics
  - Coverage
  - Coverage Metrics
  - Custom Object 04
  - Custom Object 04 Metrics
  - Custom Object 05
  - Custom Object 05 Metrics
  - Custom Object 06
  - Custom Object 06 Metrics
  - Custom Object 07
  - Custom Object 07 Metrics
  - Custom Object 08
  - Custom Object 08 Metrics
  - Custom Object 09
  - Custom Object 09 Metrics
  - Custom Object 1
  - Custom Object 1 Metrics
  - Custom Object 10
  - Custom Object 10 Metrics
  - Custom Object 11



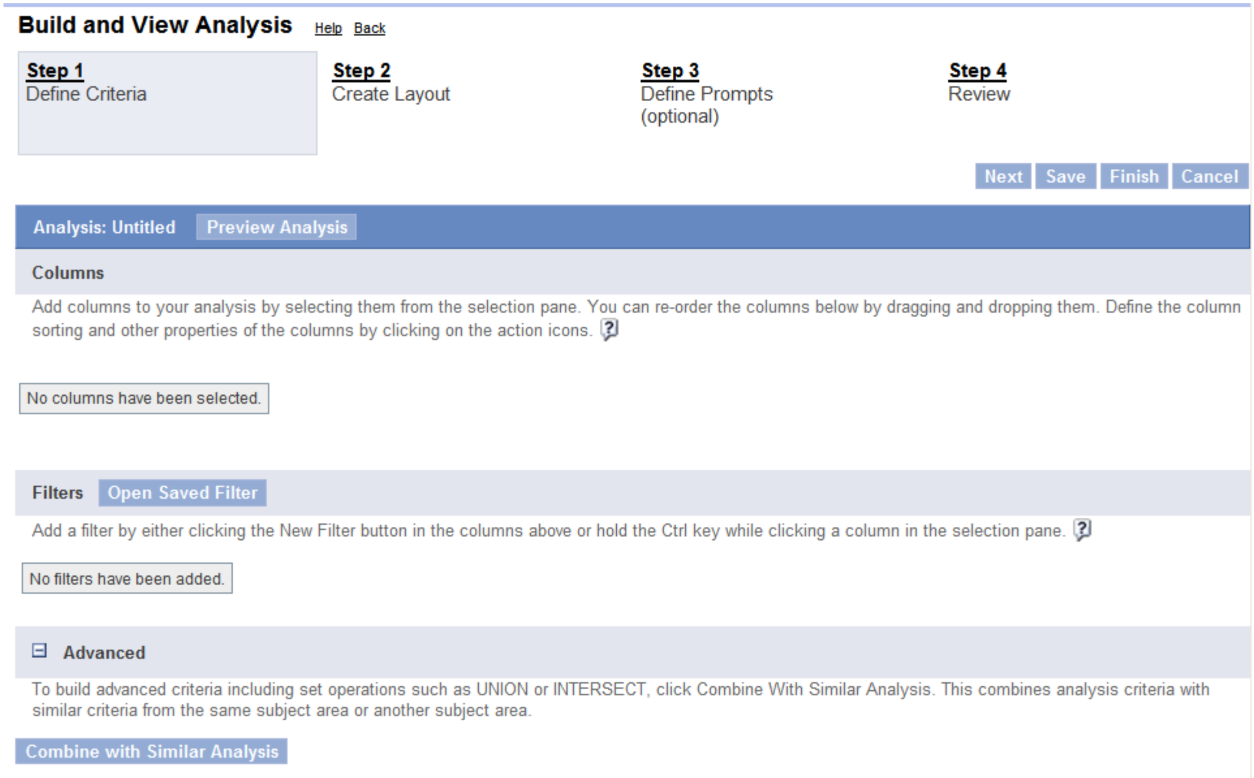
Active Subject Area:
Sales Stage History

- Columns
  - Account
  - Historical Sales Stage
  - Opportunity
  - Sales Stage Metrics



Active Subject Area:
Pipeline History

- Columns
  - Account
  - Date
  - Historical Pipeline Metrics
  - Opportunity
  - Owned By User
  - Pipeline Snapshot Date
  - Territory



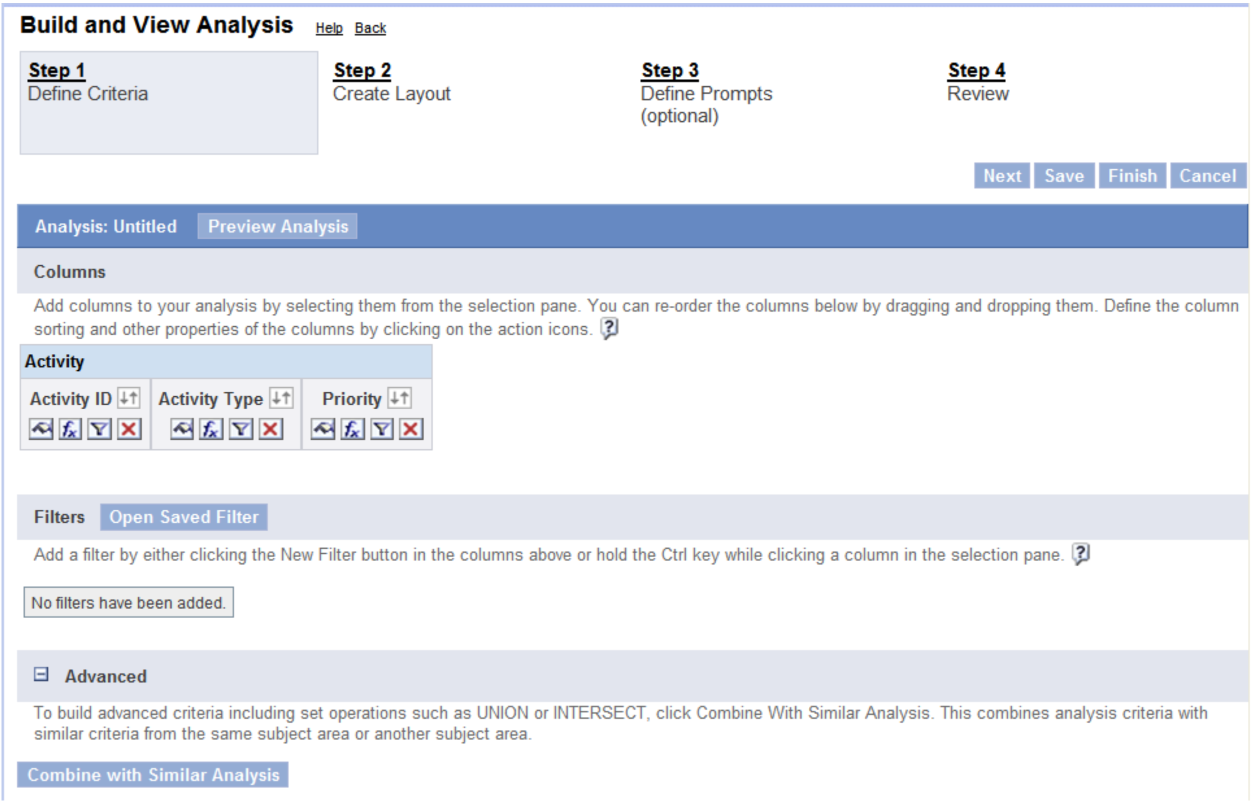
Add columns to your analysis by selecting them from the selection pane. You can re-order the columns below by dragging and dropping them. Define the column sorting and other properties of the columns by clicking on the action icons.

No columns have been selected.

Add a filter by either clicking the New Filter button in the columns above or hold the Ctrl key while clicking a column in the selection pane.

No filters have been added.

To build advanced criteria including set operations such as UNION or INTERSECT, click Combine With Similar Analysis. This combines analysis criteria with similar criteria from the same subject area or another subject area.

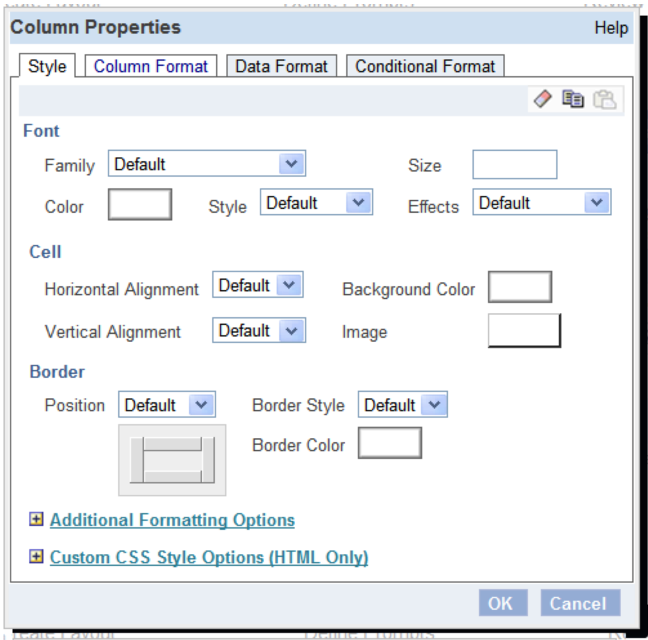


Add columns to your analysis by selecting them from the selection pane. You can re-order the columns below by dragging and dropping them. Define the column sorting and other properties of the columns by clicking on the action icons.

Add a filter by either clicking the New Filter button in the columns above or hold the Ctrl key while clicking a column in the selection pane.

No filters have been added.

To build advanced criteria including set operations such as UNION or INTERSECT, click Combine With Similar Analysis. This combines analysis criteria with similar criteria from the same subject area or another subject area.



Family: Default

Size:

Color:

Style: Default

Effects: Default

Horizontal Alignment: Default

Background Color:

Vertical Alignment: Default

Image:

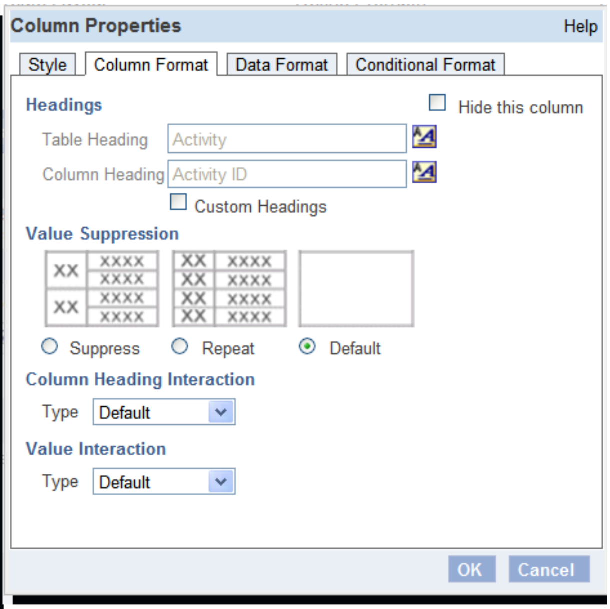
Position: Default

Border Style: Default

Border Color:

⊞ Additional Formatting Options

⊞ Custom CSS Style Options (HTML Only)



☐ Hide this column

Table Heading: Activity

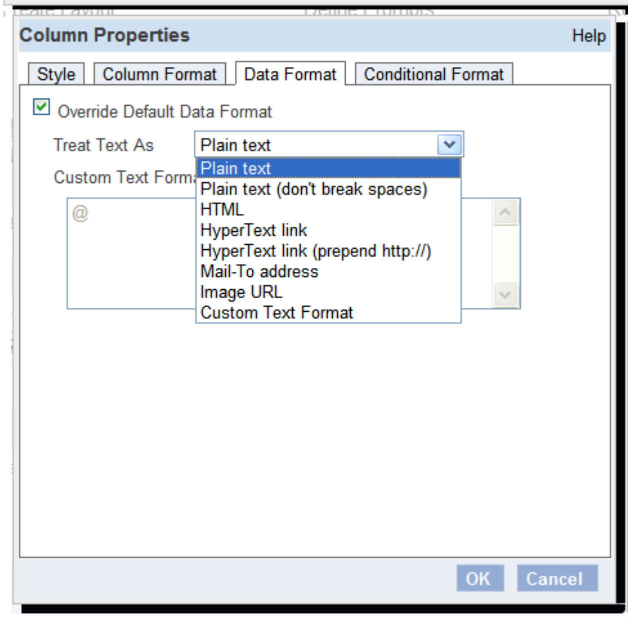
Column Heading: Activity ID

☐ Custom Headings

○ Suppress ○ Repeat ● Default

Column Heading Interaction – Type: Default

Value Interaction – Type: Default



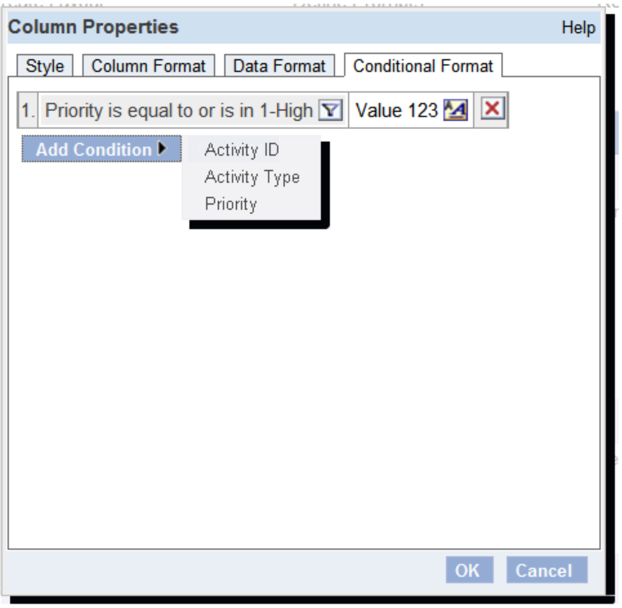
☑ Override Default Data Format

Treat Text As: Plain text

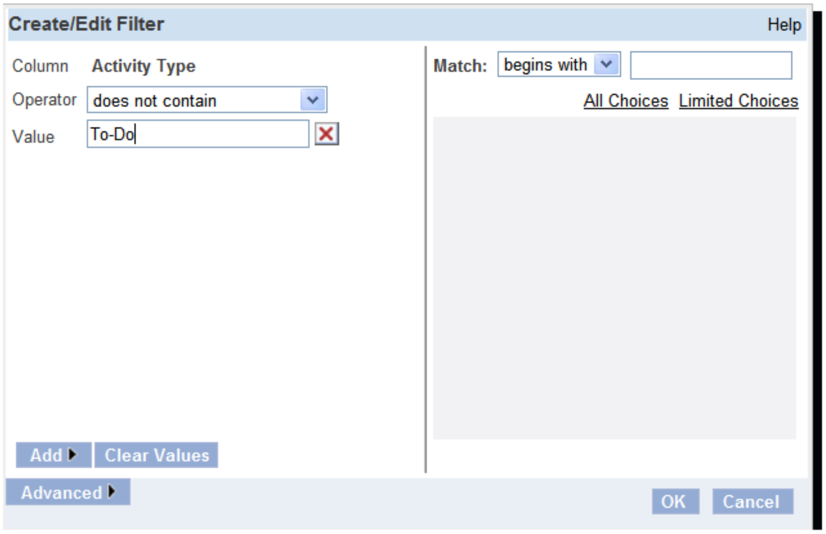
Custom Text Form

@

- Plain text
- Plain text (don't break spaces)
- HTML
- HyperText link
- HyperText link (prepend http://)
- Mail-To address
- Image URL
- Custom Text Format



1. Priority is equal to or is in 1-High Value 123



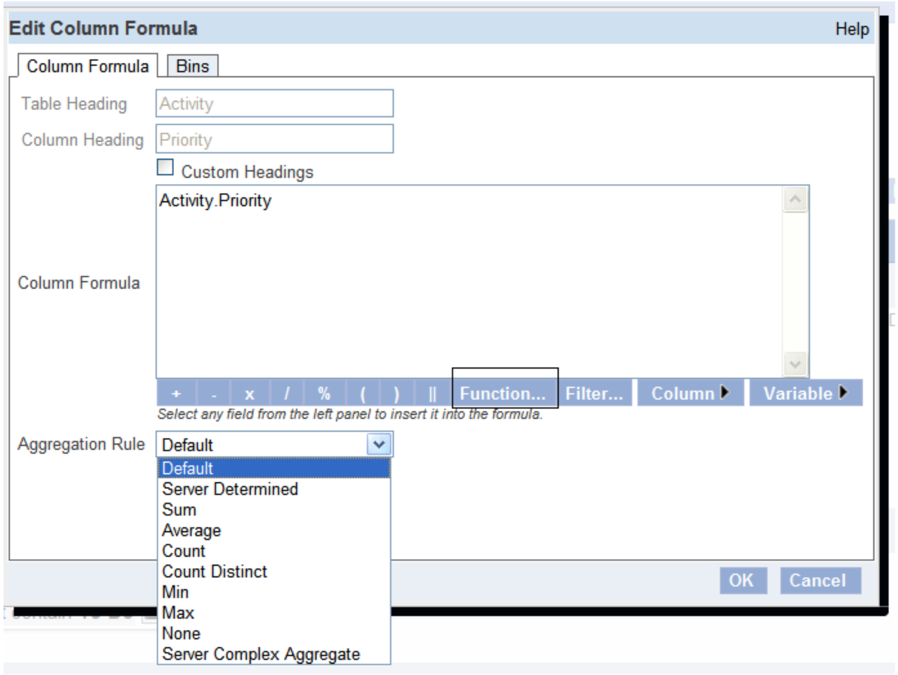
Create/Edit Filter

Column: Activity Type

Operator: does not contain

Value: To-Do

Match: begins with



Edit Column Formula

Table Heading: Activity

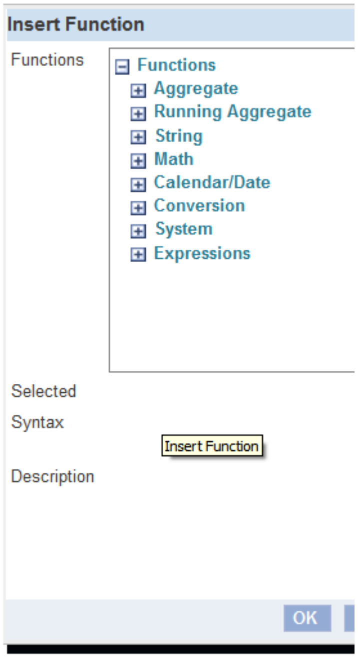
Column Heading: Priority

☐ Custom Headings

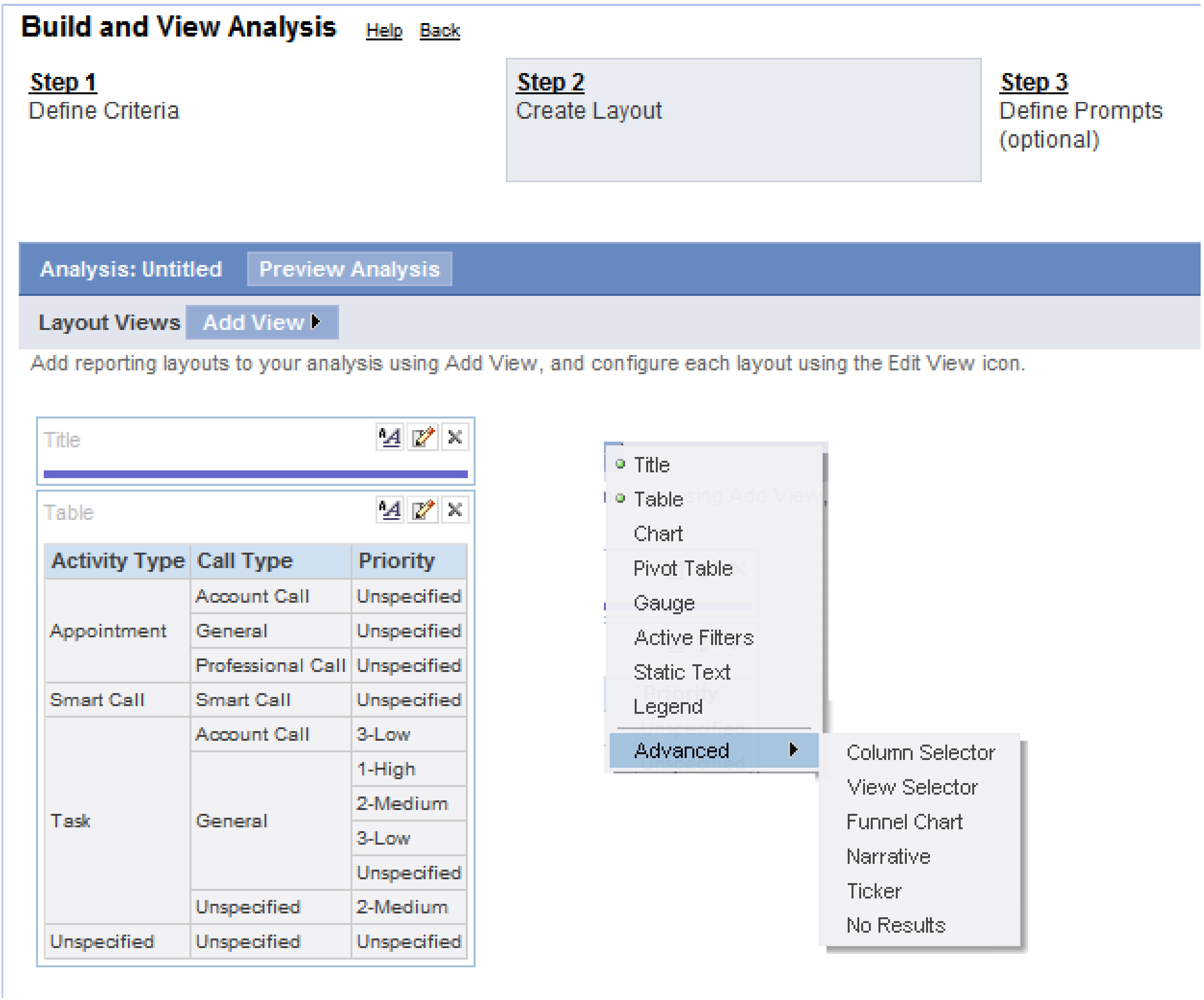
Column Formula: Activity.Priority

Select any field from the left panel to insert it into the formula.

Aggregation Rule: Default

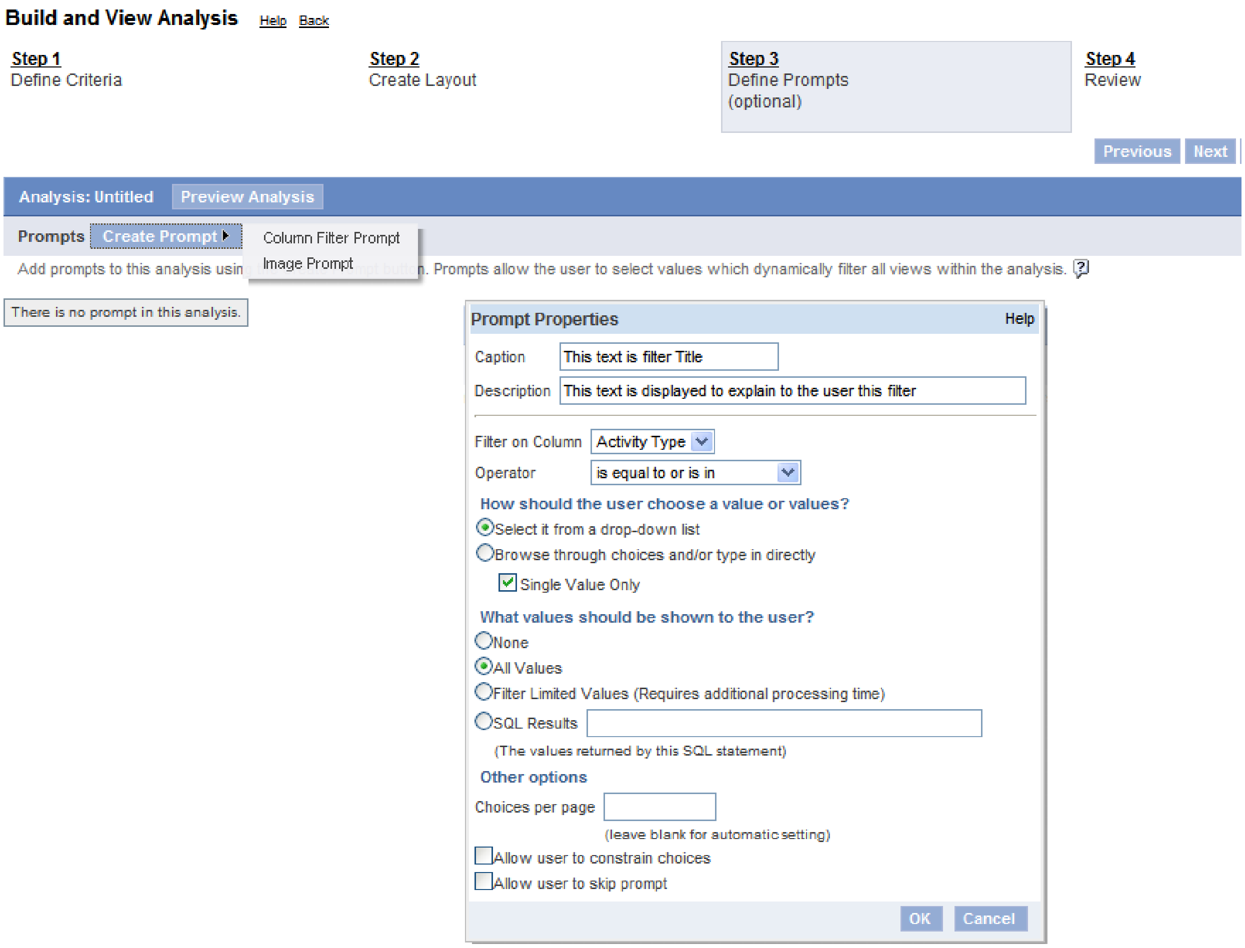


Insert Function



Add reporting layouts to your analysis using Add View, and configure each layout using the Edit View icon.

Activity Type	Call Type	Priority
Appointment	Account Call	Unspecified
	General	Unspecified
	Professional Call	Unspecified
Smart Call	Smart Call	Unspecified
Task	Account Call	3-Low
	General	1-High
		2-Medium
		3-Low
		Unspecified
	Unspecified	2-Medium
Unspecified	Unspecified	Unspecified



Build and View Analysis Help Back

Step 1 Define Criteria

Step 2 Create Layout

Step 3 Define Prompts (optional)

Step 4 Review

Previous Next

Analysis: Untitled Preview Analysis

Prompts Create Prompt ▸
- Column Filter Prompt
- Image Prompt

Add prompts to this analysis usin n. Prompts allow the user to select values which dynamically filter all views within the analysis.

There is no prompt in this analysis.

Prompt Properties Help

Caption: This text is filter Title

Description: This text is displayed to explain to the user this filter

Filter on Column: Activity Type

Operator: is equal to or is in

How should the user choose a value or values?

● Select it from a drop-down list
○ Browse through choices and/or type in directly
☑ Single Value Only

What values should be shown to the user?

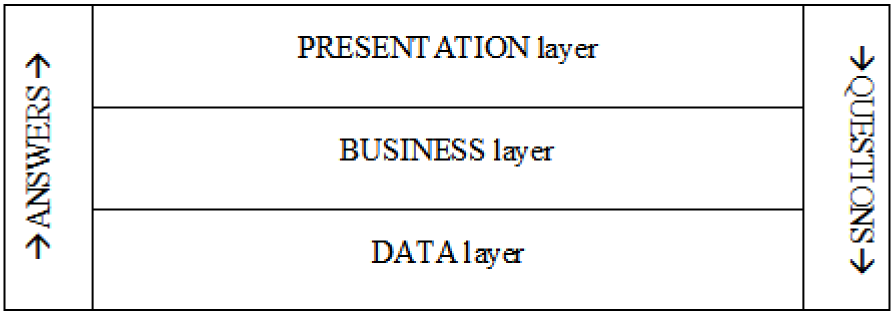
○ None
● All Values
○ Filter Limited Values (Requires additional processing time)
○ SQL Results
(The values returned by this SQL statement)

Other options

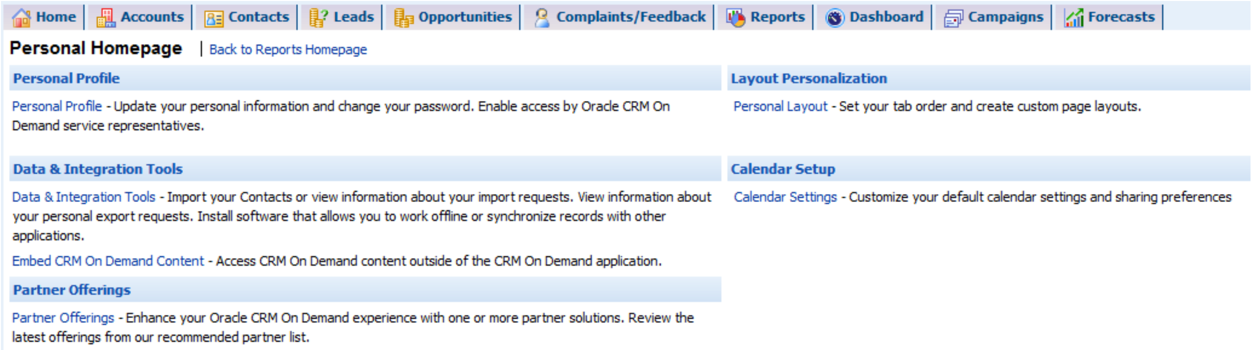
Choices per page
(leave blank for automatic setting)

☐ Allow user to constrain choices
☐ Allow user to skip prompt

OK Cancel



Chapter 10 Images



Personal Homepage | Back to Reports Homepage

Personal Profile

Personal Profile - Update your personal information and change your password. Enable access by Oracle CRM On Demand service representatives.

Data & Integration Tools

Data & Integration Tools - Import your Contacts or view information about your import requests. View information about your personal export requests. Install software that allows you to work offline or synchronize records with other applications.

Embed CRM On Demand Content - Access CRM On Demand content outside of the CRM On Demand application.

Partner Offerings

Partner Offerings - Enhance your Oracle CRM On Demand experience with one or more partner solutions. Review the latest offerings from our recommended partner list.

Layout Personalization

Personal Layout - Set your tab order and create custom page layouts.

Calendar Setup

Calendar Settings - Customize your default calendar settings and sharing preferences

Data & Integration Tools | Back to Personal Homepage

Personal Import and Export Tools

Import Your Contacts - Import your Contacts into Oracle CRM On Demand using the Import Assistant. To review information about importing Contacts, click the Help link.

Import Request Queue - View information about your pending and completed import requests.

Export Request Queue - View information about your pending and completed export requests.

Oracle PIM Sync On Demand

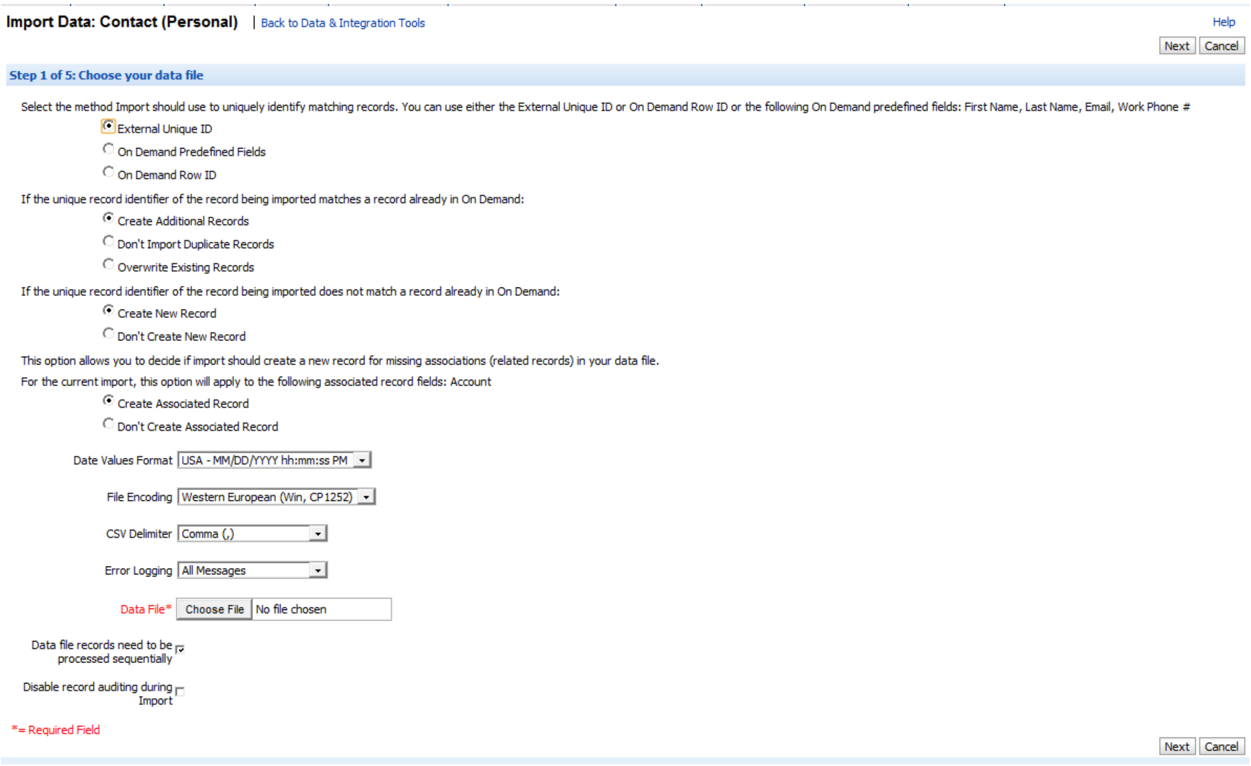
Oracle PIM Sync On Demand - Install software that allows you to synchronize your Oracle CRM On Demand Appointments, Contacts, and Tasks with Microsoft Outlook, Palm OS, and Lotus Notes.

Oracle Outlook Email Integration On Demand

Oracle Outlook Email Integration On Demand - Install software that allows you to add emails to Oracle CRM On Demand directly from Microsoft Outlook. You can link emails to Account, Contact, Lead, Opportunity, or Service Request records in Oracle CRM On Demand.

Oracle Offline On Demand

Oracle Offline On Demand - Install software that allows you to work offline. You can review, edit, and create Accounts, Contacts, Opportunities, tasks, and appointments while disconnected from the network.



Import Data: Contact (Personal) | Back to Data & Integration Tools

Step 1 of 5: Choose your data file

Select the method Import should use to uniquely identify matching records. You can use either the External Unique ID or On Demand Row ID or the following On Demand predefined fields: First Name, Last Name, Email, Work Phone #

- ● External Unique ID
- ○ On Demand Predefined Fields
- ○ On Demand Row ID

If the unique record identifier of the record being imported matches a record already in On Demand:

- ● Create Additional Records
- ○ Don't Import Duplicate Records
- ○ Overwrite Existing Records

If the unique record identifier of the record being imported does not match a record already in On Demand:

- ● Create New Record
- ○ Don't Create New Record

This option allows you to decide if import should create a new record for missing associations (related records) in your data file.

For the current import, this option will apply to the following associated record fields: Account

- ● Create Associated Record
- ○ Don't Create Associated Record

Date Values Format: USA - MM/DD/YYYY hh:mm:ss PM

File Encoding: Western European (Win, CP1252)

CSV Delimiter: Comma (,)

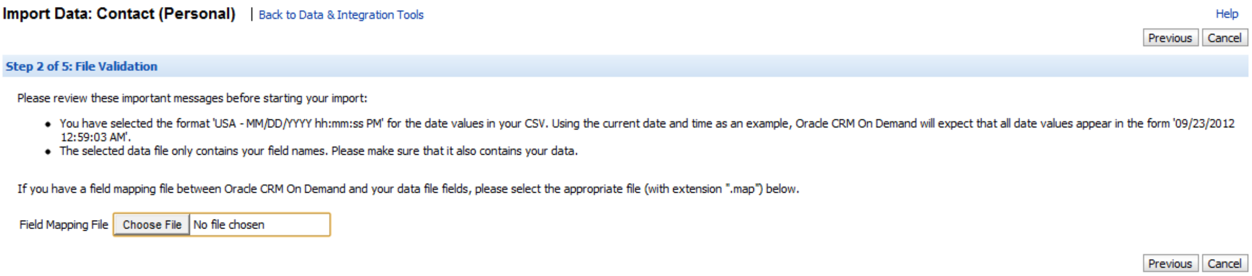
Error Logging: All Messages

Data File*: No file chosen

Data file records need to be processed sequentially ☑

Disable record auditing during Import ☐

*= Required Field



Import Data: Contact (Personal) | Back to Data & Integration Tools

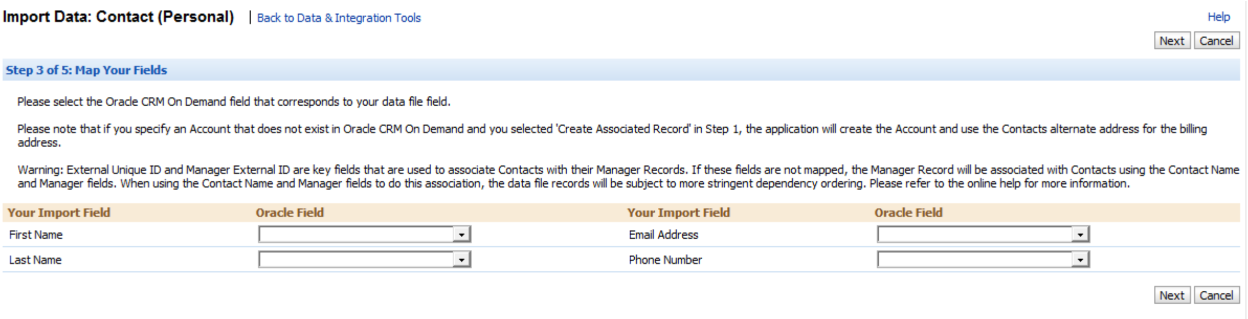
Step 2 of 5: File Validation

Please review these important messages before starting your import:

- You have selected the format 'USA - MM/DD/YYYY hh:mm:ss PM' for the date values in your CSV. Using the current date and time as an example, Oracle CRM On Demand will expect that all date values appear in the form '09/23/2012 12:59:03 AM'.
- The selected data file only contains your field names. Please make sure that it also contains your data.

If you have a field mapping file between Oracle CRM On Demand and your data file fields, please select the appropriate file (with extension ".map") below.

Field Mapping File: No file chosen



Import Data: Contact (Personal) | Back to Data & Integration Tools

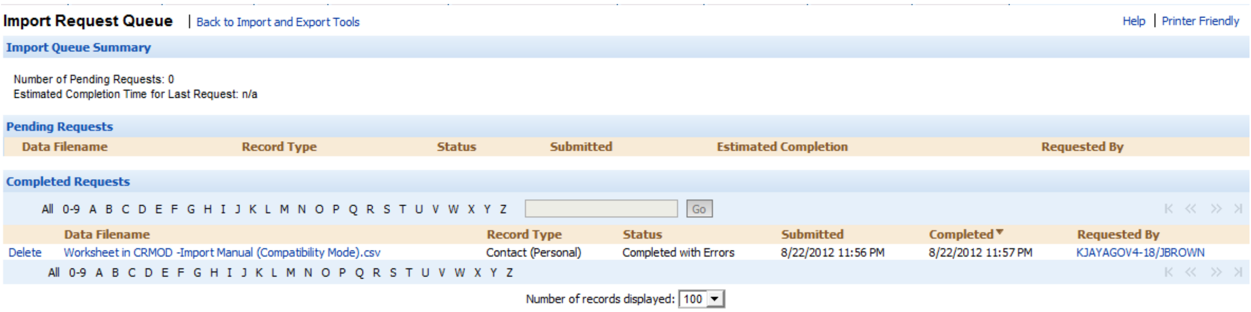
Step 3 of 5: Map Your Fields

Please select the Oracle CRM On Demand field that corresponds to your data file field.

Please note that if you specify an Account that does not exist in Oracle CRM On Demand and you selected 'Create Associated Record' in Step 1, the application will create the Account and use the Contacts alternate address for the billing address.

Warning: External Unique ID and Manager External ID are key fields that are used to associate Contacts with their Manager Records. If these fields are not mapped, the Manager Record will be associated with Contacts using the Contact Name and Manager fields. When using the Contact Name and Manager fields to do this association, the data file records will be subject to more stringent dependency ordering. Please refer to the online help for more information.

Your Import Field	Oracle Field	Your Import Field	Oracle Field
First Name		Email Address	
Last Name		Phone Number	



Import Request Queue | Back to Import and Export Tools

Import Queue Summary

Number of Pending Requests: 0
Estimated Completion Time for Last Request: n/a

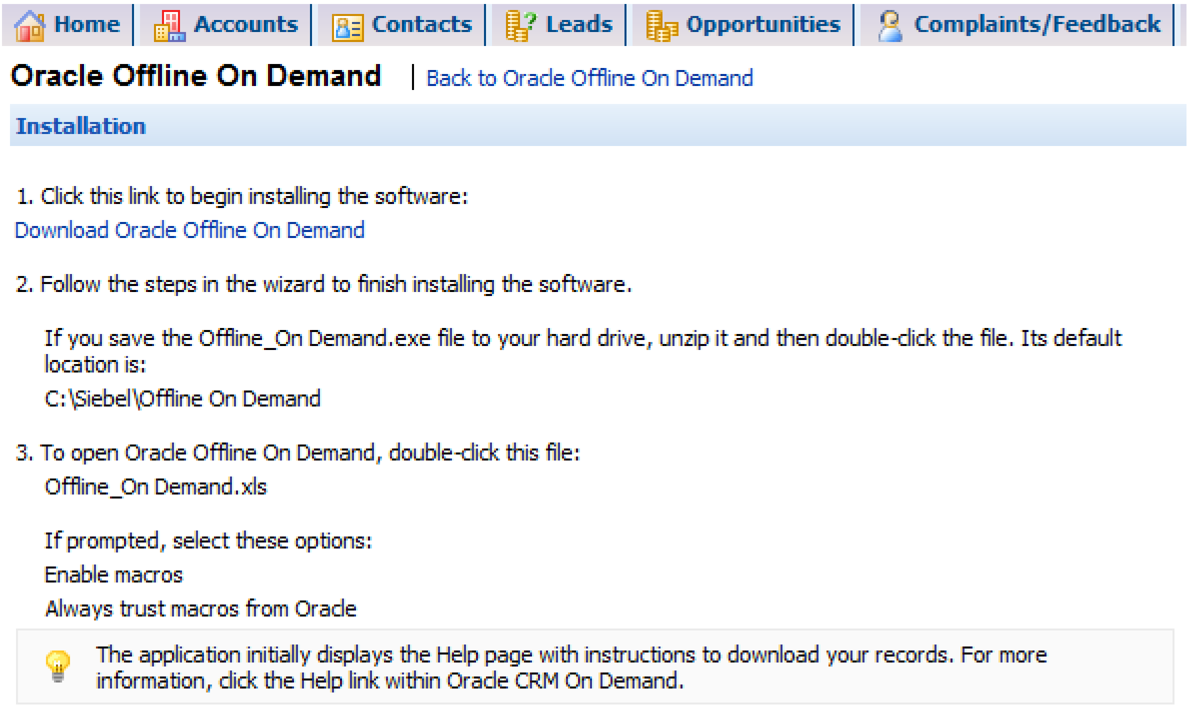
Pending Requests

Data Filename	Record Type	Status	Submitted	Estimated Completion	Requested By

Completed Requests

	Data Filename	Record Type	Status	Submitted	Completed	Requested By
Delete	Worksheet in CRMOD -Import Manual (Compatibility Mode).csv	Contact (Personal)	Completed with Errors	8/22/2012 11:56 PM	8/22/2012 11:57 PM	KJAYAGOV4-18/JBROWN

Number of records displayed: 100



Oracle Offline On Demand | Back to Oracle Offline On Demand

Installation

1. Click this link to begin installing the software:
Download Oracle Offline On Demand

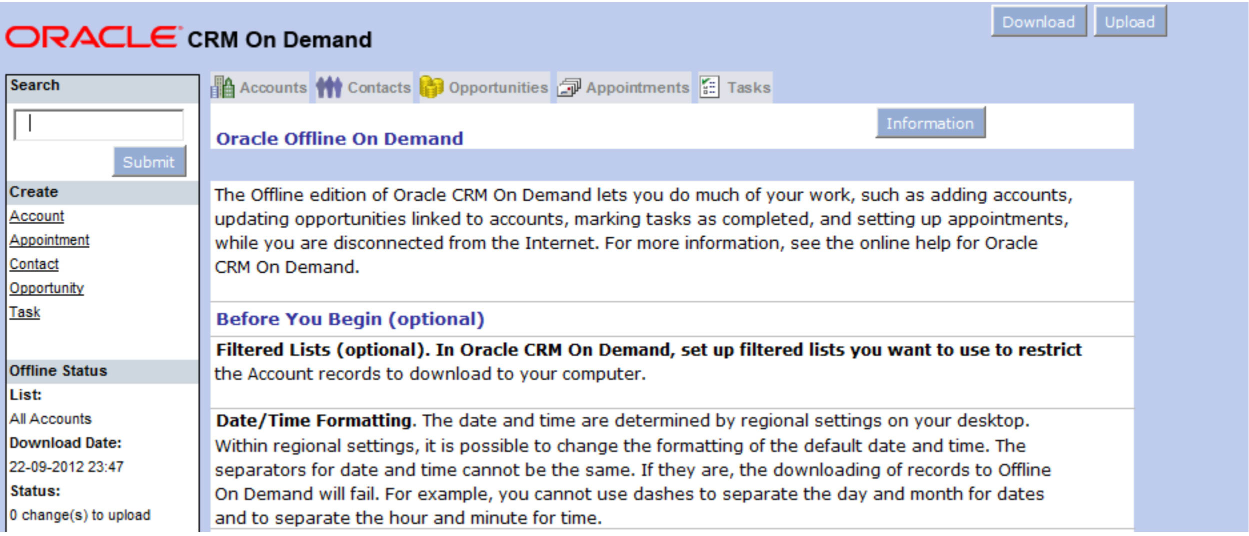
2. Follow the steps in the wizard to finish installing the software.

If you save the Offline_On Demand.exe file to your hard drive, unzip it and then double-click the file. Its default location is:
C:\Siebel\Offline On Demand

3. To open Oracle Offline On Demand, double-click this file:
Offline_On Demand.xls

If prompted, select these options:
Enable macros
Always trust macros from Oracle

The application initially displays the Help page with instructions to download your records. For more information, click the Help link within Oracle CRM On Demand.



Offline Status
List: All Accounts
Download Date: 22-09-2012 23:47
Status: 0 change(s) to upload

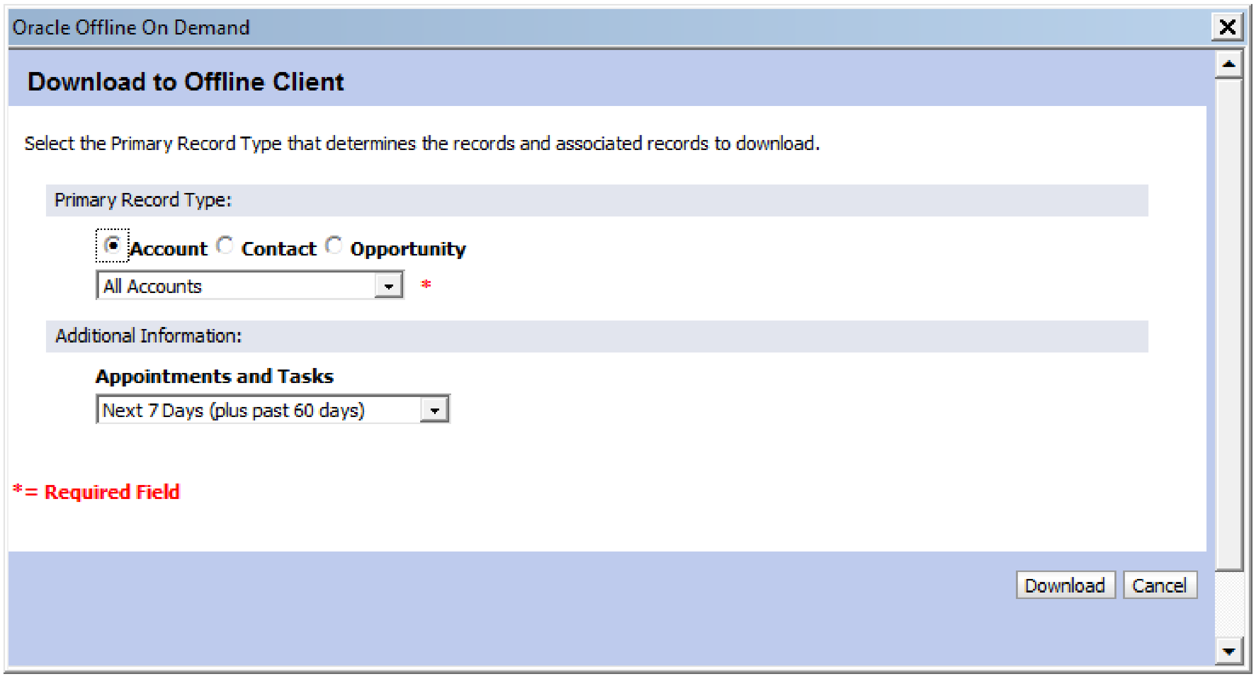
Oracle Offline On Demand

The Offline edition of Oracle CRM On Demand lets you do much of your work, such as adding accounts, updating opportunities linked to accounts, marking tasks as completed, and setting up appointments, while you are disconnected from the Internet. For more information, see the online help for Oracle CRM On Demand.

Before You Begin (optional)

Filtered Lists (optional). In Oracle CRM On Demand, set up filtered lists you want to use to restrict the Account records to download to your computer.

Date/Time Formatting. The date and time are determined by regional settings on your desktop. Within regional settings, it is possible to change the formatting of the default date and time. The separators for date and time cannot be the same. If they are, the downloading of records to Offline On Demand will fail. For example, you cannot use dashes to separate the day and month for dates and to separate the hour and minute for time.



Download to Offline Client

Select the Primary Record Type that determines the records and associated records to download.

Primary Record Type:

● **Account** ○ **Contact** ○ **Opportunity**

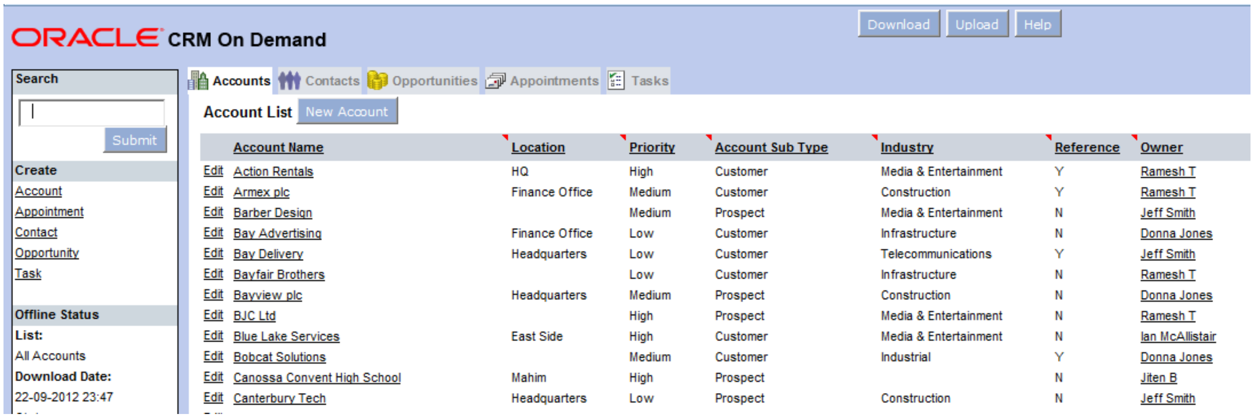
All Accounts *

Additional Information:

Appointments and Tasks

Next 7 Days (plus past 60 days)

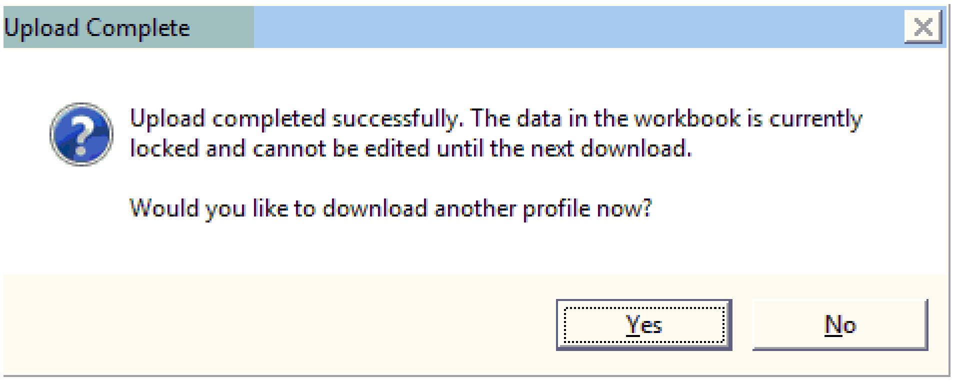
*= Required Field



Offline Status
List: All Accounts
Download Date: 22-09-2012 23:47

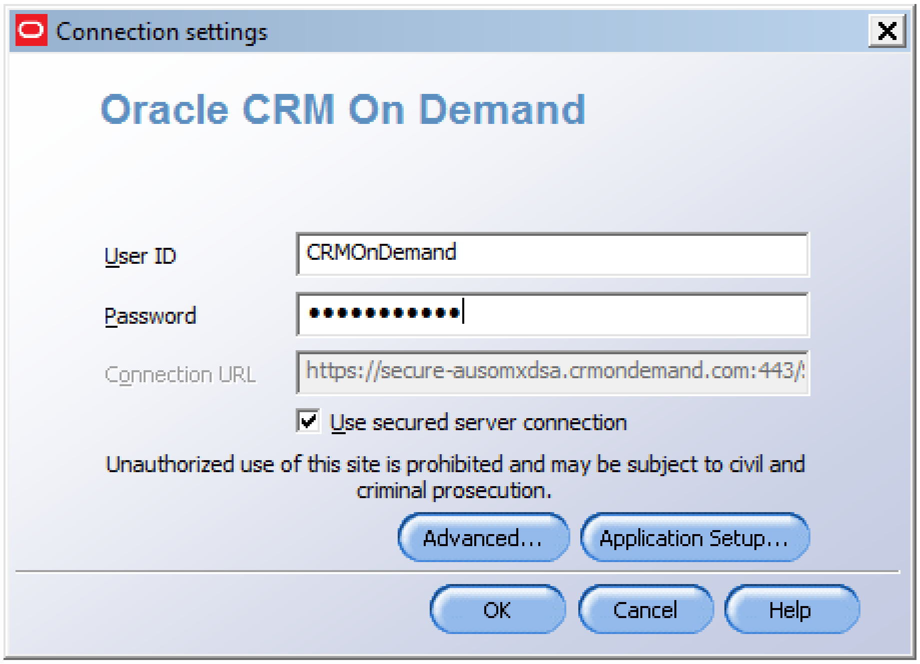
Account List

	Account Name	Location	Priority	Account Sub Type	Industry	Reference	Owner
Edit	Action Rentals	HQ	High	Customer	Media & Entertainment	Y	Ramesh T
Edit	Armex plc	Finance Office	Medium	Customer	Construction	Y	Ramesh T
Edit	Barber Design		Medium	Prospect	Media & Entertainment	N	Jeff Smith
Edit	Bay Advertising	Finance Office	Low	Customer	Infrastructure	N	Donna Jones
Edit	Bay Delivery	Headquarters	Low	Customer	Telecommunications	Y	Jeff Smith
Edit	Bayfair Brothers		Low	Customer	Infrastructure	N	Ramesh T
Edit	Bayview plc	Headquarters	Medium	Prospect	Construction	N	Donna Jones
Edit	BJC Ltd		High	Prospect	Media & Entertainment	N	Ramesh T
Edit	Blue Lake Services	East Side	High	Customer	Media & Entertainment	N	Ian McAllistair
Edit	Bobcat Solutions		Medium	Customer	Industrial	Y	Donna Jones
Edit	Canossa Convent High School	Mahim	High	Prospect		N	Jiten B
Edit	Canterbury Tech	Headquarters	Low	Prospect	Construction	N	Jeff Smith



Upload completed successfully. The data in the workbook is currently locked and cannot be edited until the next download.

Would you like to download another profile now?



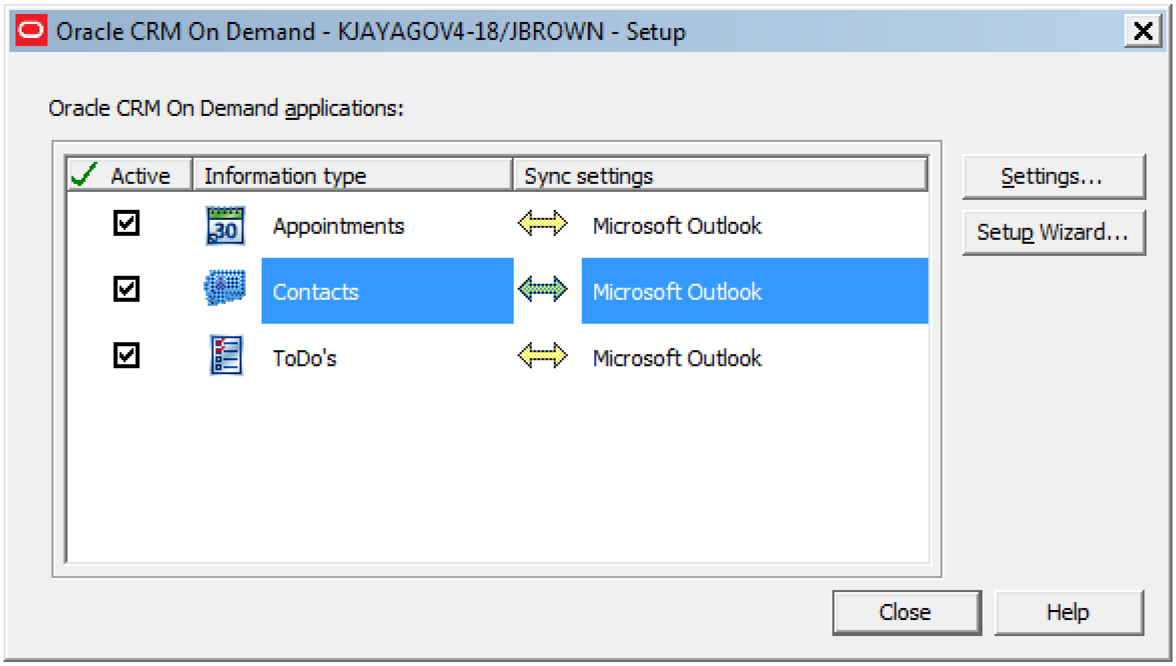
User ID: CRMOnDemand

Password: ●●●●●●●●●●●●

Connection URL: https://secure-ausomxdsa.crmondemand.com:443/

☑ Use secured server connection

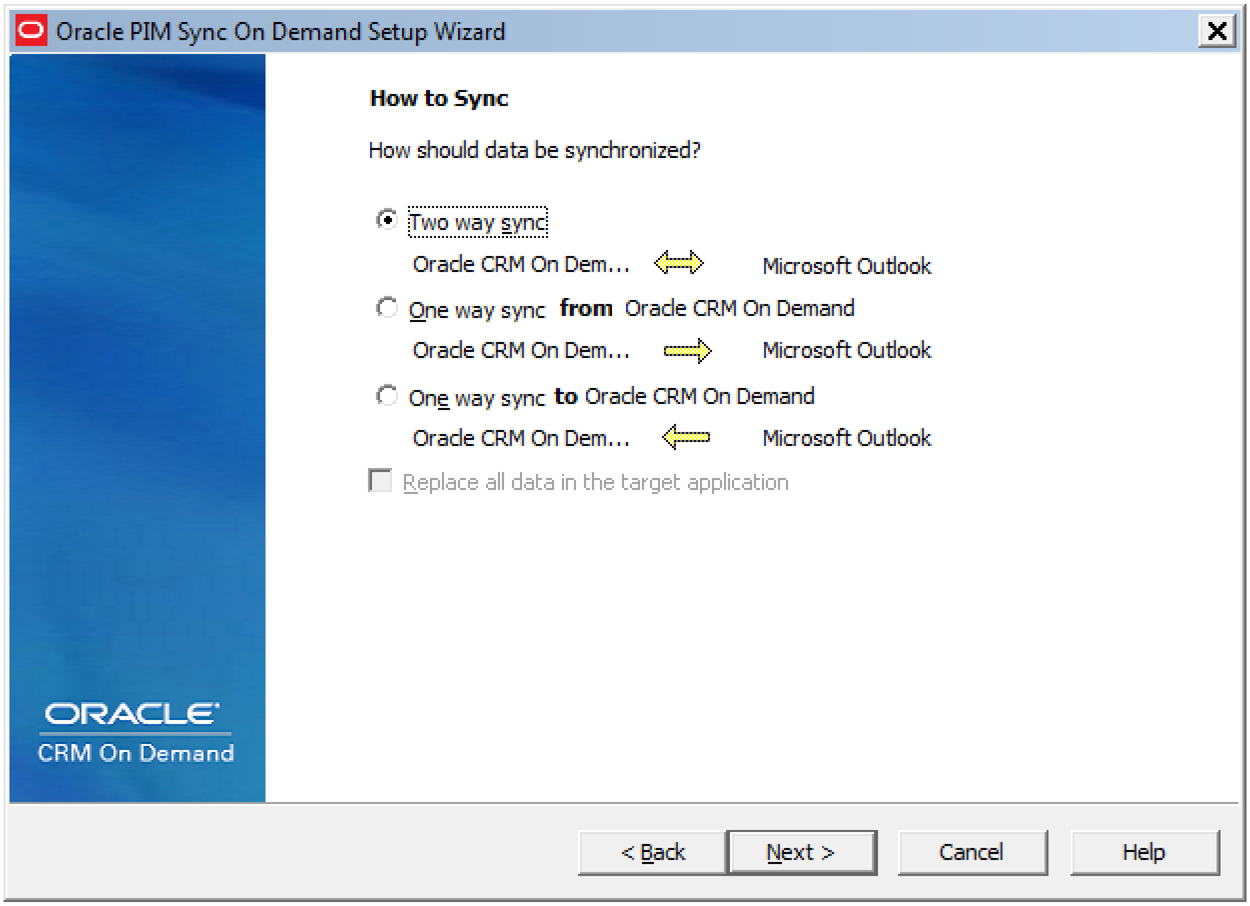
Unauthorized use of this site is prohibited and may be subject to civil and criminal prosecution.



Oracle CRM On Demand - KJAYAGOV4-18/JBROWN - Setup

Oracle CRM On Demand applications:

✓ Active	Information type	Sync settings
☑	Appointments	⇔ Microsoft Outlook
☑	Contacts	⇔ Microsoft Outlook
☑	ToDo's	⇔ Microsoft Outlook



Oracle PIM Sync On Demand Setup Wizard

How to Sync

How should data be synchronized?

● Two way sync

Oracle CRM On Dem... ⇔ Microsoft Outlook

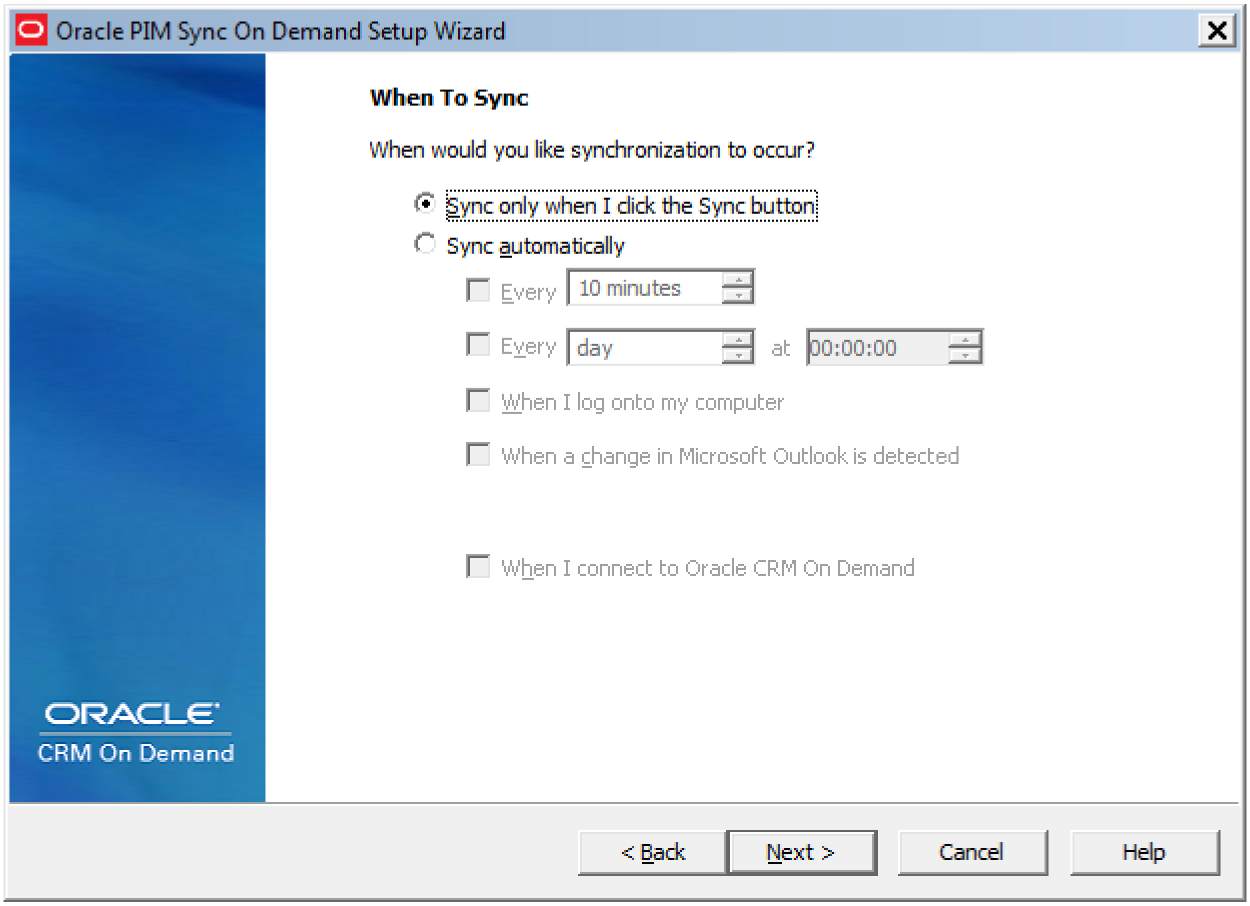
○ One way sync **from** Oracle CRM On Demand

Oracle CRM On Dem... ⇒ Microsoft Outlook

○ One way sync **to** Oracle CRM On Demand

Oracle CRM On Dem... ⇐ Microsoft Outlook

☐ Replace all data in the target application

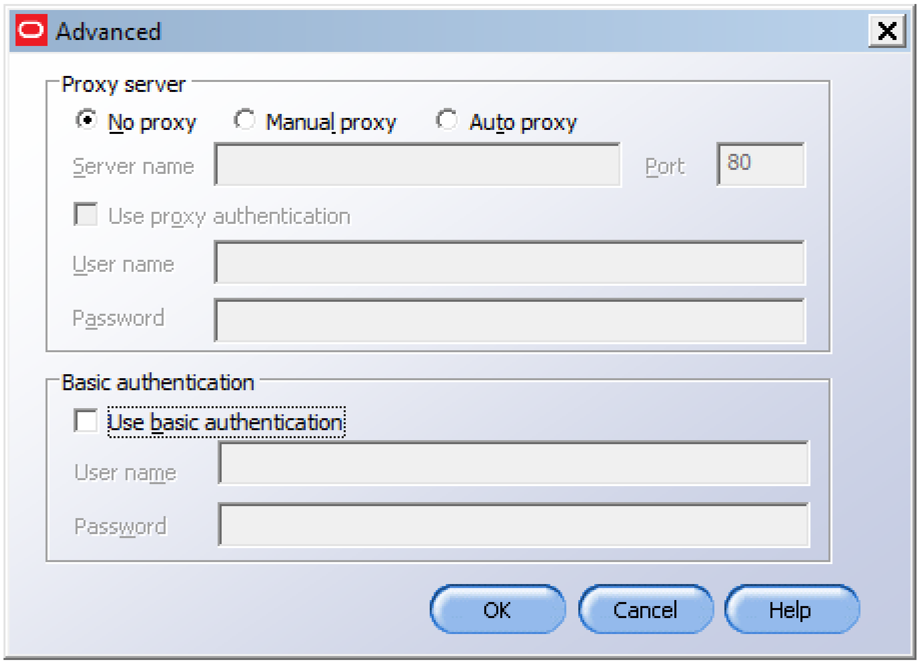


Oracle PIM Sync On Demand Setup Wizard

When To Sync

When would you like synchronization to occur?

- ● Sync only when I click the Sync button
- ○ Sync automatically
  - ☐ Every 10 minutes
  - ☐ Every day at 00:00:00
  - ☐ When I log onto my computer
  - ☐ When a change in Microsoft Outlook is detected
  - ☐ When I connect to Oracle CRM On Demand



Advanced

Proxy server

● No proxy ○ Manual proxy ○ Auto proxy

Server name:

Port: 80

☐ Use proxy authentication

User name:

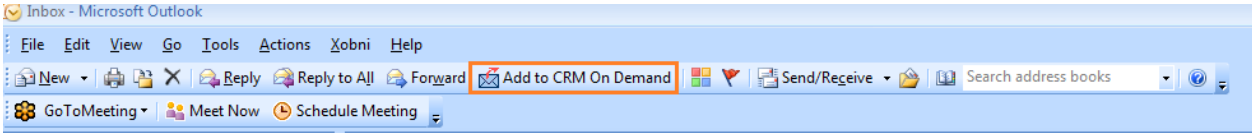
Password:

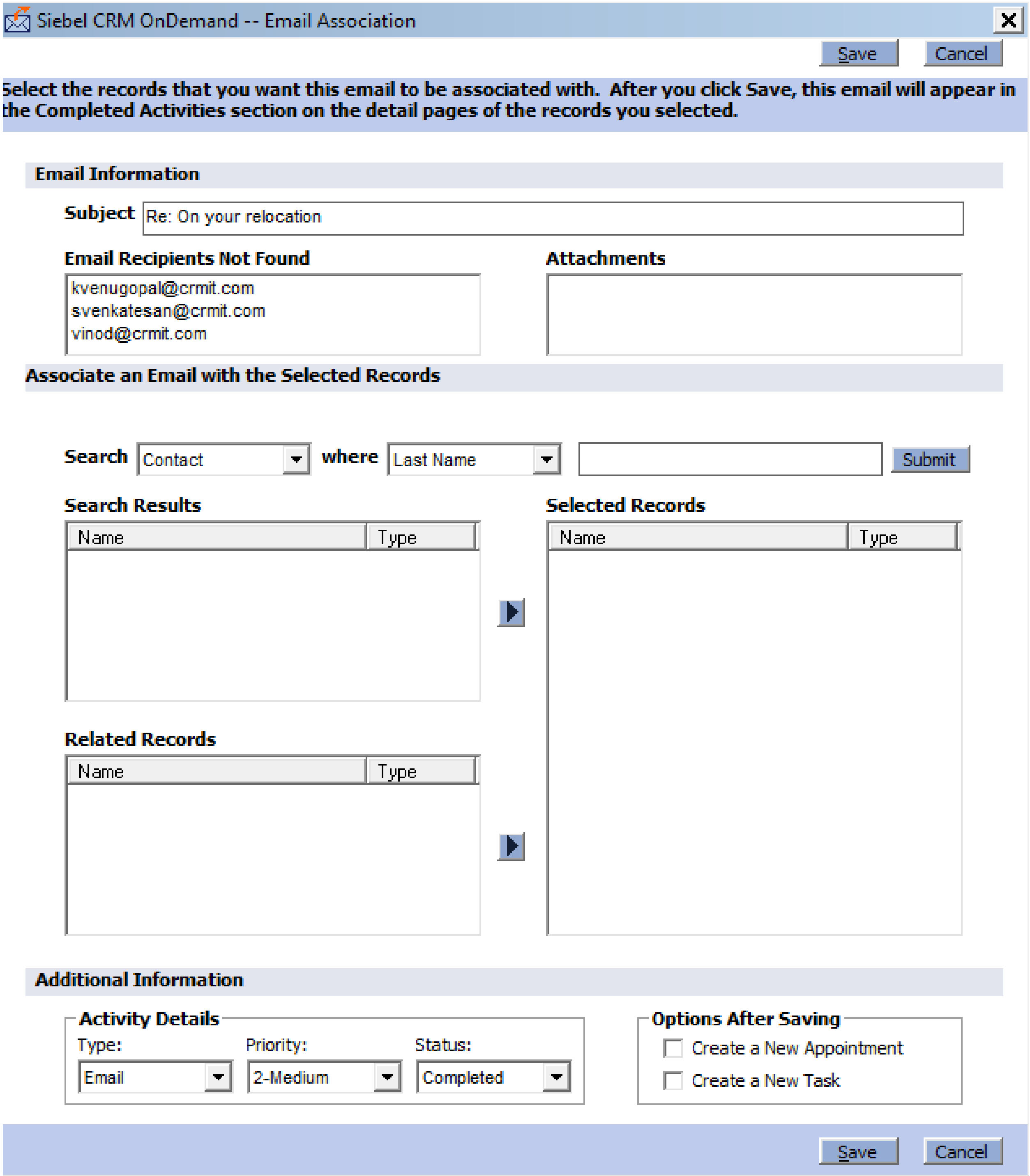
Basic authentication

☐ Use basic authentication

User name:

Password:





Select the records that you want this email to be associated with. After you click Save, this email will appear in the Completed Activities section on the detail pages of the records you selected.

Email Information

Subject Re: On your relocation

Email Recipients Not Found

kvenugopal@crmit.com
svenkatesan@crmit.com
vinod@crmit.com

Attachments

Associate an Email with the Selected Records

Search Contact **where** Last Name

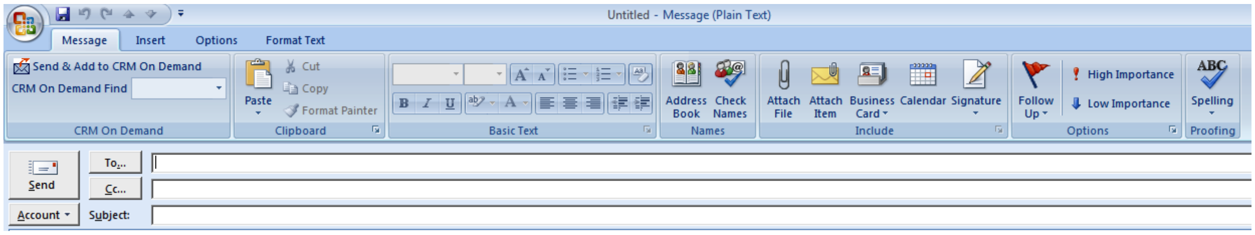
Additional Information

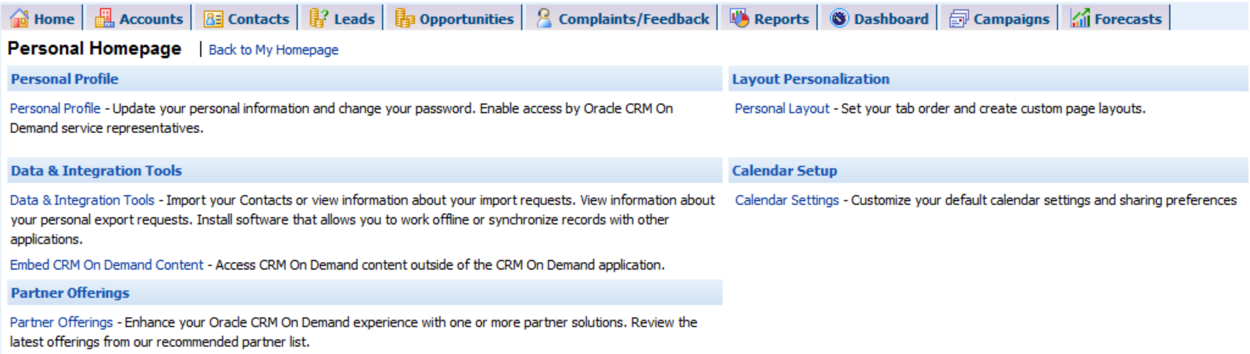
Activity Details

Type: Email
Priority: 2-Medium
Status: Completed

Options After Saving

☐ Create a New Appointment
☐ Create a New Task





Personal Homepage | Back to My Homepage

Personal Profile

Personal Profile - Update your personal information and change your password. Enable access by Oracle CRM On Demand service representatives.

Layout Personalization

Personal Layout - Set your tab order and create custom page layouts.

Data & Integration Tools

Data & Integration Tools - Import your Contacts or view information about your import requests. View information about your personal export requests. Install software that allows you to work offline or synchronize records with other applications.

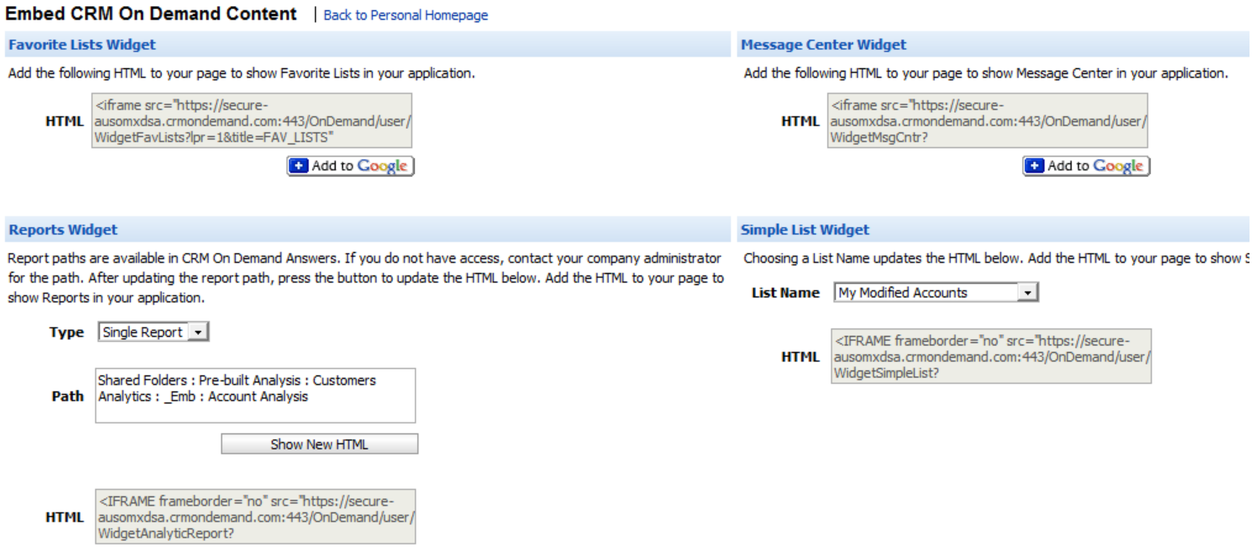
Embed CRM On Demand Content - Access CRM On Demand content outside of the CRM On Demand application.

Calendar Setup

Calendar Settings - Customize your default calendar settings and sharing preferences

Partner Offerings

Partner Offerings - Enhance your Oracle CRM On Demand experience with one or more partner solutions. Review the latest offerings from our recommended partner list.



Embed CRM On Demand Content | Back to Personal Homepage

Favorite Lists Widget

Add the following HTML to your page to show Favorite Lists in your application.

HTML <iframe src="https://secure-ausomxdsa.crmondemand.com:443/OnDemand/user/WidgetFavLists?lpr=1&title=FAV_LISTS"

Message Center Widget

Add the following HTML to your page to show Message Center in your application.

HTML <iframe src="https://secure-ausomxdsa.crmondemand.com:443/OnDemand/user/WidgetMsgCntr?

Reports Widget

Report paths are available in CRM On Demand Answers. If you do not have access, contact your company administrator for the path. After updating the report path, press the button to update the HTML below. Add the HTML to your page to show Reports in your application.

Type Single Report

Path Shared Folders : Pre-built Analysis : Customers Analytics : _Emb : Account Analysis

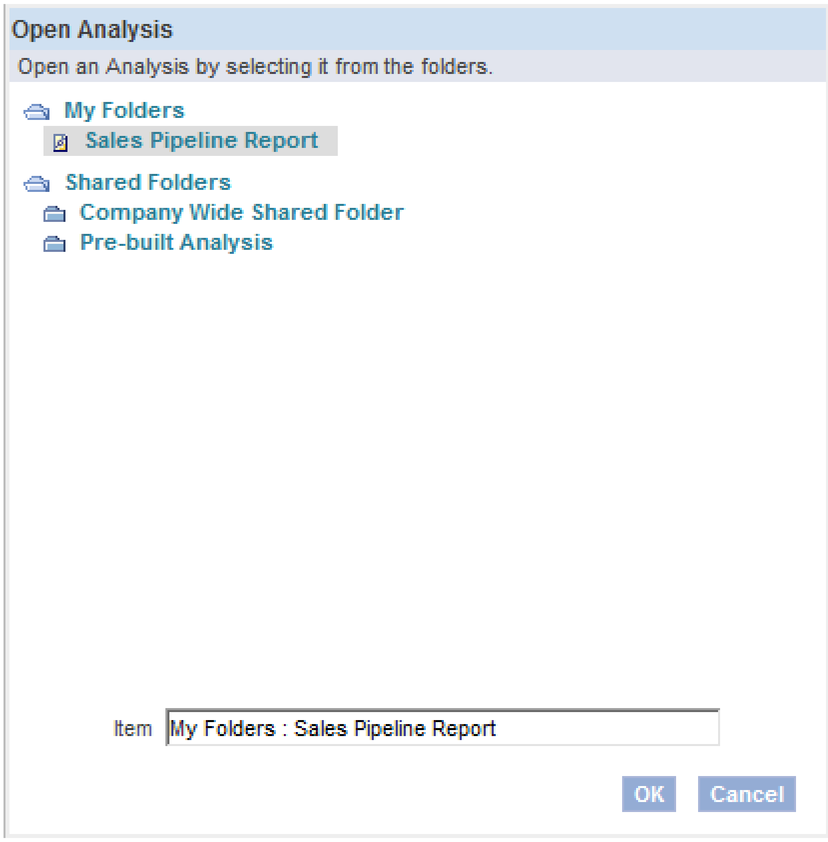
HTML <IFRAME frameborder="no" src="https://secure-ausomxdsa.crmondemand.com:443/OnDemand/user/WidgetAnalyticReport?

Simple List Widget

Choosing a List Name updates the HTML below. Add the HTML to your page to show S

List Name My Modified Accounts

HTML <IFRAME frameborder="no" src="https://secure-ausomxdsa.crmondemand.com:443/OnDemand/user/WidgetSimpleList?

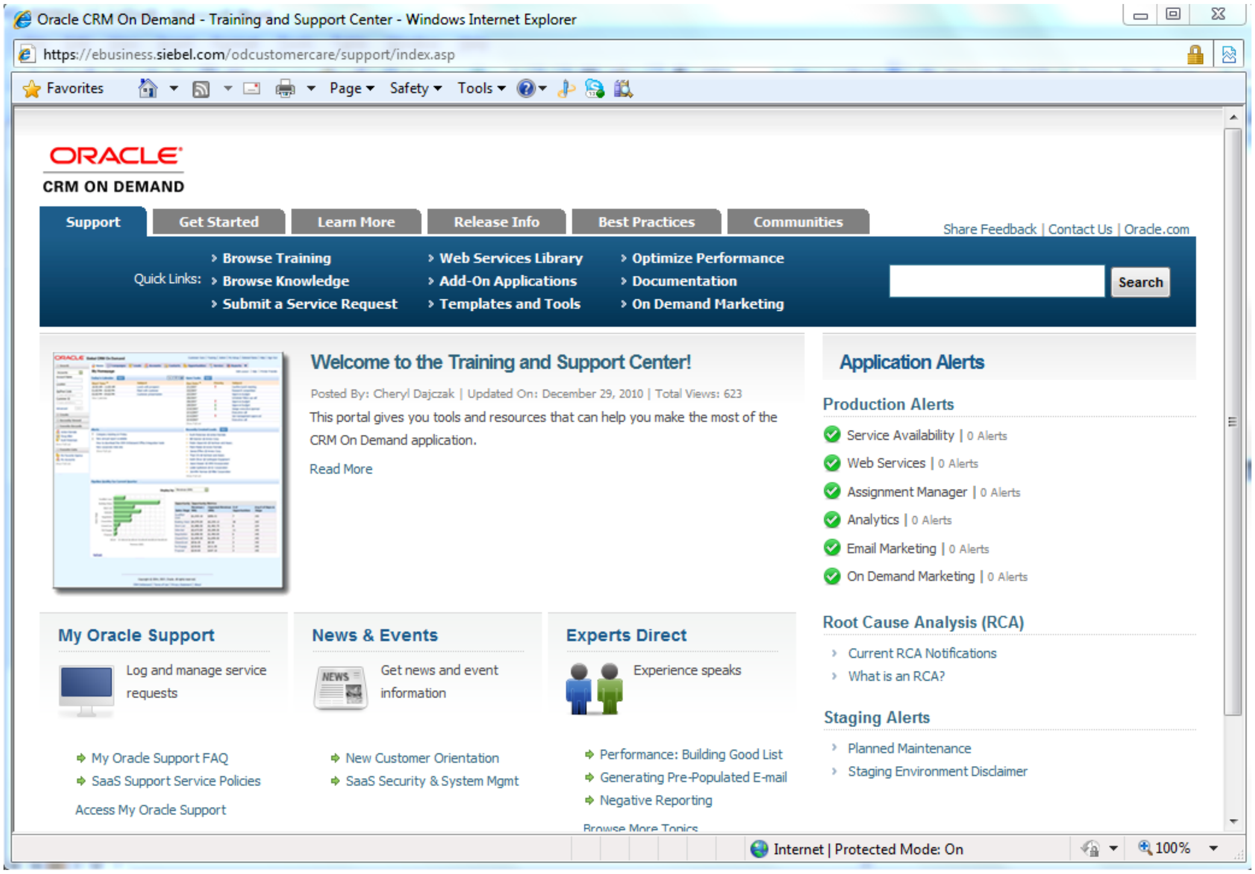


Open Analysis

Open an Analysis by selecting it from the folders.

Item: My Folders : Sales Pipeline Report

Chapter 11 Images



Welcome to the Training and Support Center!

Posted By: Cheryl Dajczak | Updated On: December 29, 2010 | Total Views: 623

This portal gives you tools and resources that can help you make the most of the CRM On Demand application.

Read More

Application Alerts

Production Alerts

- ✓ Service Availability | 0 Alerts
- ✓ Web Services | 0 Alerts
- ✓ Assignment Manager | 0 Alerts
- ✓ Analytics | 0 Alerts
- ✓ Email Marketing | 0 Alerts
- ✓ On Demand Marketing | 0 Alerts

Root Cause Analysis (RCA)

- Current RCA Notifications
- What is an RCA?

Staging Alerts

- Planned Maintenance
- Staging Environment Disclaimer

My Oracle Support

Log and manage service requests

- My Oracle Support FAQ
- SaaS Support Service Policies

Access My Oracle Support

News & Events

Get news and event information

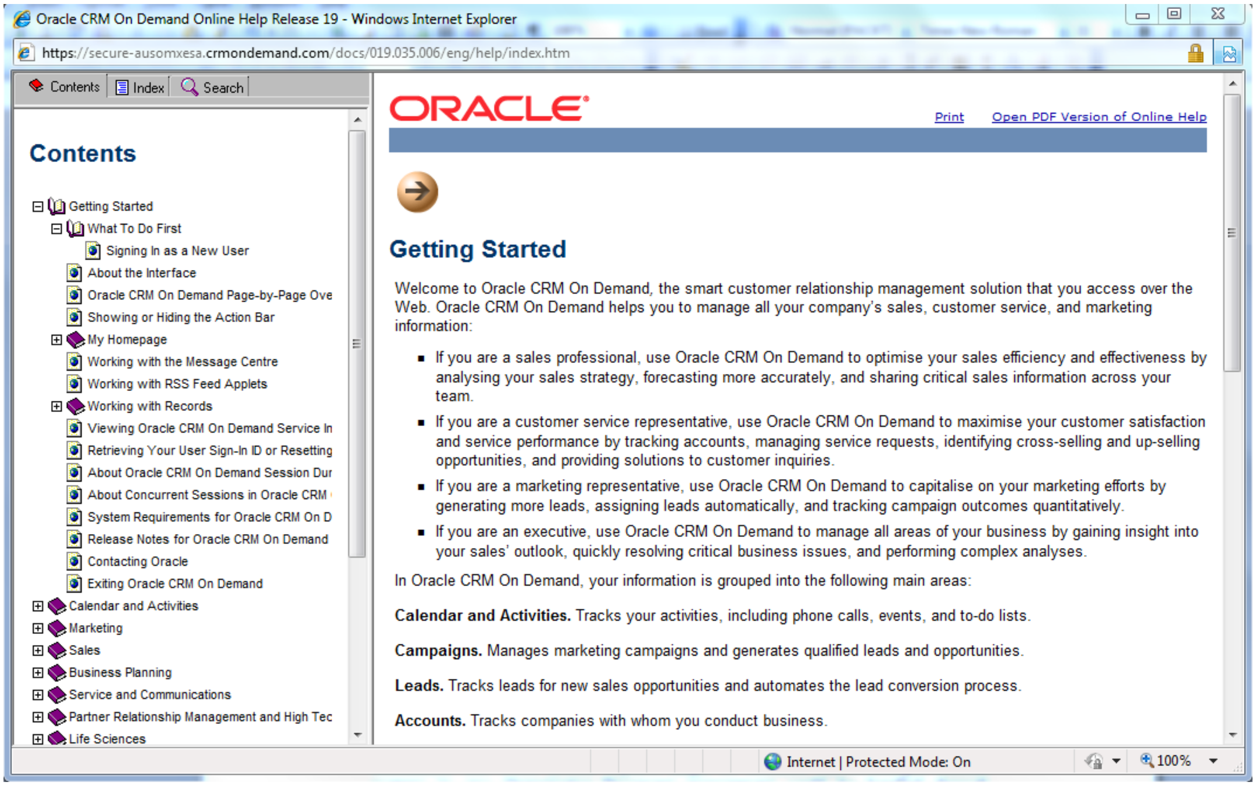
- New Customer Orientation
- SaaS Security & System Mgmt

Experts Direct

Experience speaks

- Performance: Building Good List
- Generating Pre-Populated E-mail
- Negative Reporting

Browse More Topics



Getting Started

Welcome to Oracle CRM On Demand, the smart customer relationship management solution that you access over the Web. Oracle CRM On Demand helps you to manage all your company's sales, customer service, and marketing information:

- If you are a sales professional, use Oracle CRM On Demand to optimise your sales efficiency and effectiveness by analysing your sales strategy, forecasting more accurately, and sharing critical sales information across your team.
- If you are a customer service representative, use Oracle CRM On Demand to maximise your customer satisfaction and service performance by tracking accounts, managing service requests, identifying cross-selling and up-selling opportunities, and providing solutions to customer inquiries.
- If you are a marketing representative, use Oracle CRM On Demand to capitalise on your marketing efforts by generating more leads, assigning leads automatically, and tracking campaign outcomes quantitatively.
- If you are an executive, use Oracle CRM On Demand to manage all areas of your business by gaining insight into your sales' outlook, quickly resolving critical business issues, and performing complex analyses.

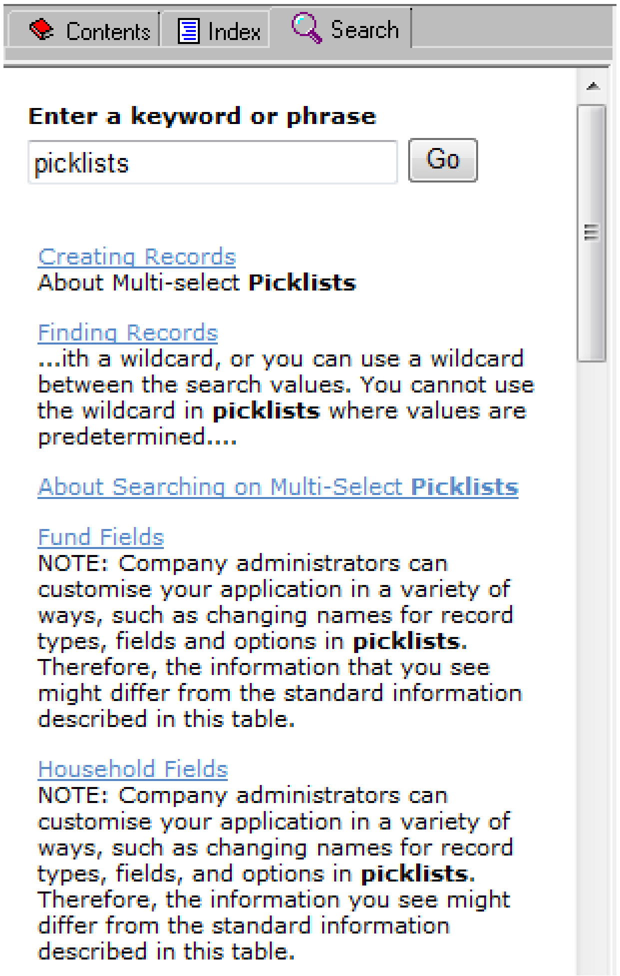
In Oracle CRM On Demand, your information is grouped into the following main areas:

Calendar and Activities. Tracks your activities, including phone calls, events, and to-do lists.

Campaigns. Manages marketing campaigns and generates qualified leads and opportunities.

Leads. Tracks leads for new sales opportunities and automates the lead conversion process.

Accounts. Tracks companies with whom you conduct business.



Enter a keyword or phrase

picklists

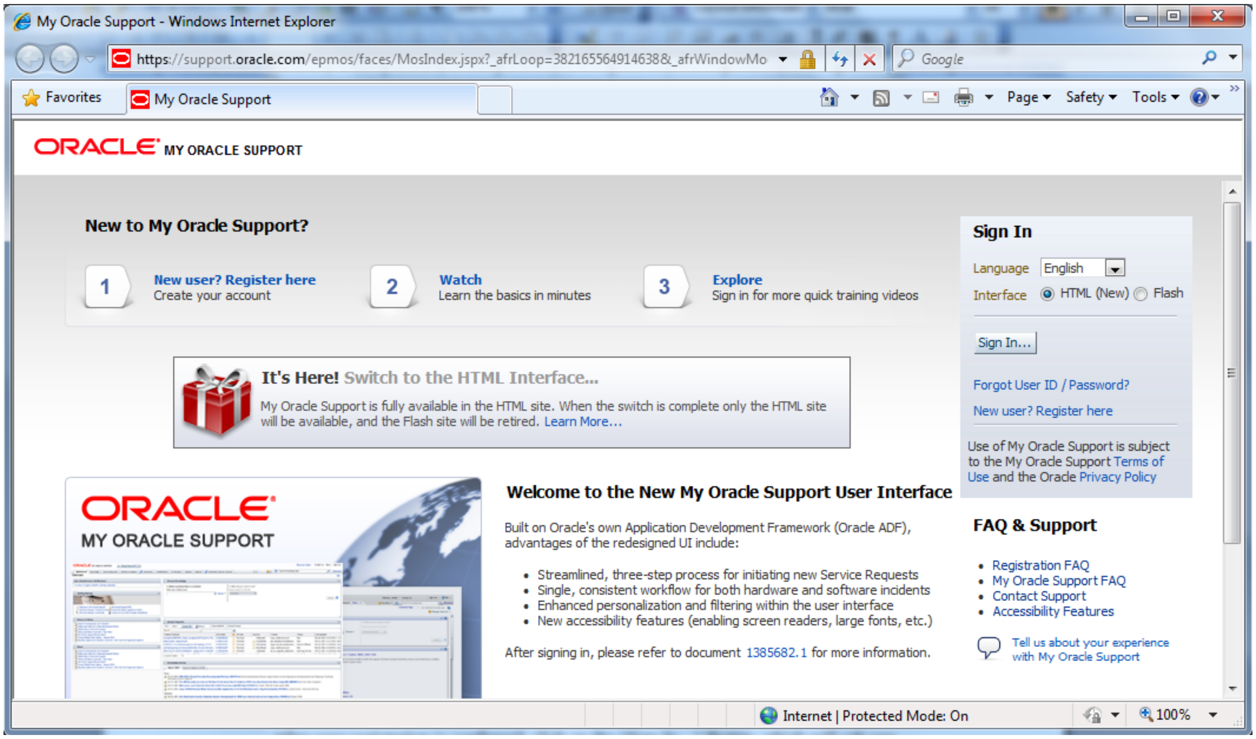
Creating Records
About Multi-select **Picklists**

Finding Records
...ith a wildcard, or you can use a wildcard between the search values. You cannot use the wildcard in **picklists** where values are predetermined....

About Searching on Multi-Select **Picklists**

Fund Fields
NOTE: Company administrators can customise your application in a variety of ways, such as changing names for record types, fields and options in **picklists**. Therefore, the information that you see might differ from the standard information described in this table.

Household Fields
NOTE: Company administrators can customise your application in a variety of ways, such as changing names for record types, fields, and options in **picklists**. Therefore, the information you see might differ from the standard information described in this table.



New to My Oracle Support?

1 **New user? Register here** Create your account

2 **Watch** Learn the basics in minutes

3 **Explore** Sign in for more quick training videos

It's Here! Switch to the HTML Interface...

My Oracle Support is fully available in the HTML site. When the switch is complete only the HTML site will be available, and the Flash site will be retired. Learn More...

Sign In

Language: English

Interface: ● HTML (New) ○ Flash

Sign In...

Forgot User ID / Password?

New user? Register here

Use of My Oracle Support is subject to the My Oracle Support Terms of Use and the Oracle Privacy Policy

ORACLE MY ORACLE SUPPORT

Welcome to the New My Oracle Support User Interface

Built on Oracle's own Application Development Framework (Oracle ADF), advantages of the redesigned UI include:

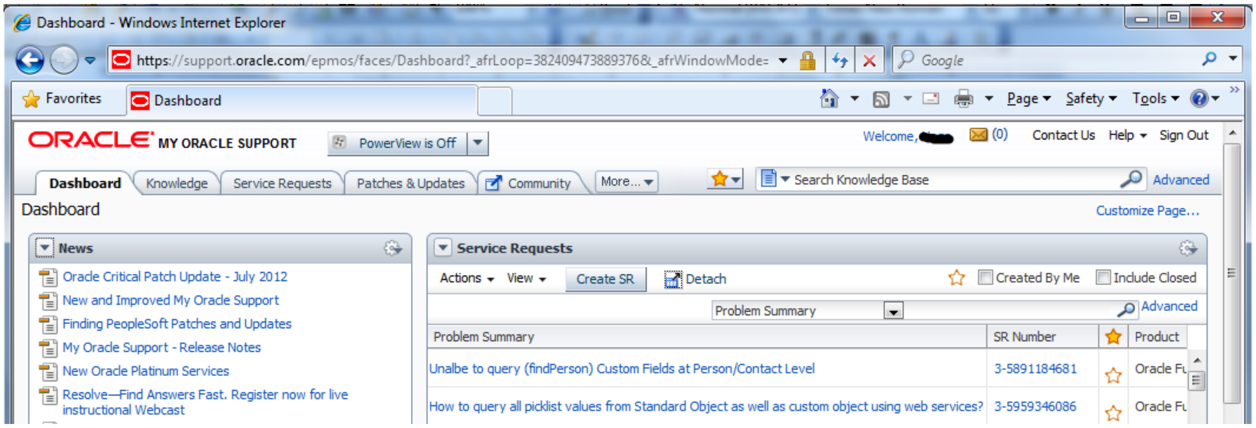
- Streamlined, three-step process for initiating new Service Requests
- Single, consistent workflow for both hardware and software incidents
- Enhanced personalization and filtering within the user interface
- New accessibility features (enabling screen readers, large fonts, etc.)

After signing in, please refer to document 1385682.1 for more information.

FAQ & Support

- Registration FAQ
- My Oracle Support FAQ
- Contact Support
- Accessibility Features

Tell us about your experience with My Oracle Support



Welcome, [redacted] (0)

Dashboard

News

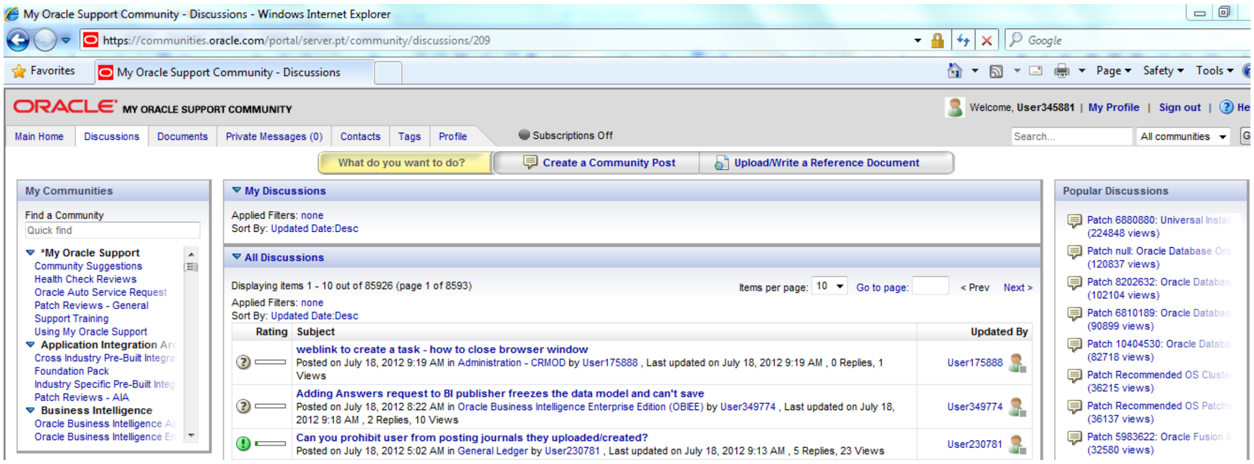
- Oracle Critical Patch Update - July 2012
- New and Improved My Oracle Support
- Finding PeopleSoft Patches and Updates
- My Oracle Support - Release Notes
- New Oracle Platinum Services
- Resolve—Find Answers Fast. Register now for live instructional Webcast

Service Requests

Actions View Create SR Detach ☐ Created By Me ☐ Include Closed

Problem Summary Advanced

Problem Summary	SR Number	☆	Product
Unalbe to query (findPerson) Custom Fields at Person/Contact Level	3-5891184681	☆	Oracle Fu
How to query all picklist values from Standard Object as well as custom object using web services?	3-5959346086	☆	Oracle Fu



Welcome, **User345881** | My Profile | Sign out | He

My Communities

Find a Community

Quick find

- *My Oracle Support
  - Community Suggestions
  - Health Check Reviews
  - Oracle Auto Service Request
  - Patch Reviews - General
  - Support Training
  - Using My Oracle Support
- Application Integration Ar
  - Cross Industry Pre-Built Integra
  - Foundation Pack
  - Industry Specific Pre-Built Integ
  - Patch Reviews - AIA
- Business Intelligence
  - Oracle Business Intelligence A
  - Oracle Business Intelligence E

My Discussions

Applied Filters: none
Sort By: Updated Date:Desc

All Discussions

Displaying items 1 - 10 out of 85926 (page 1 of 8593)

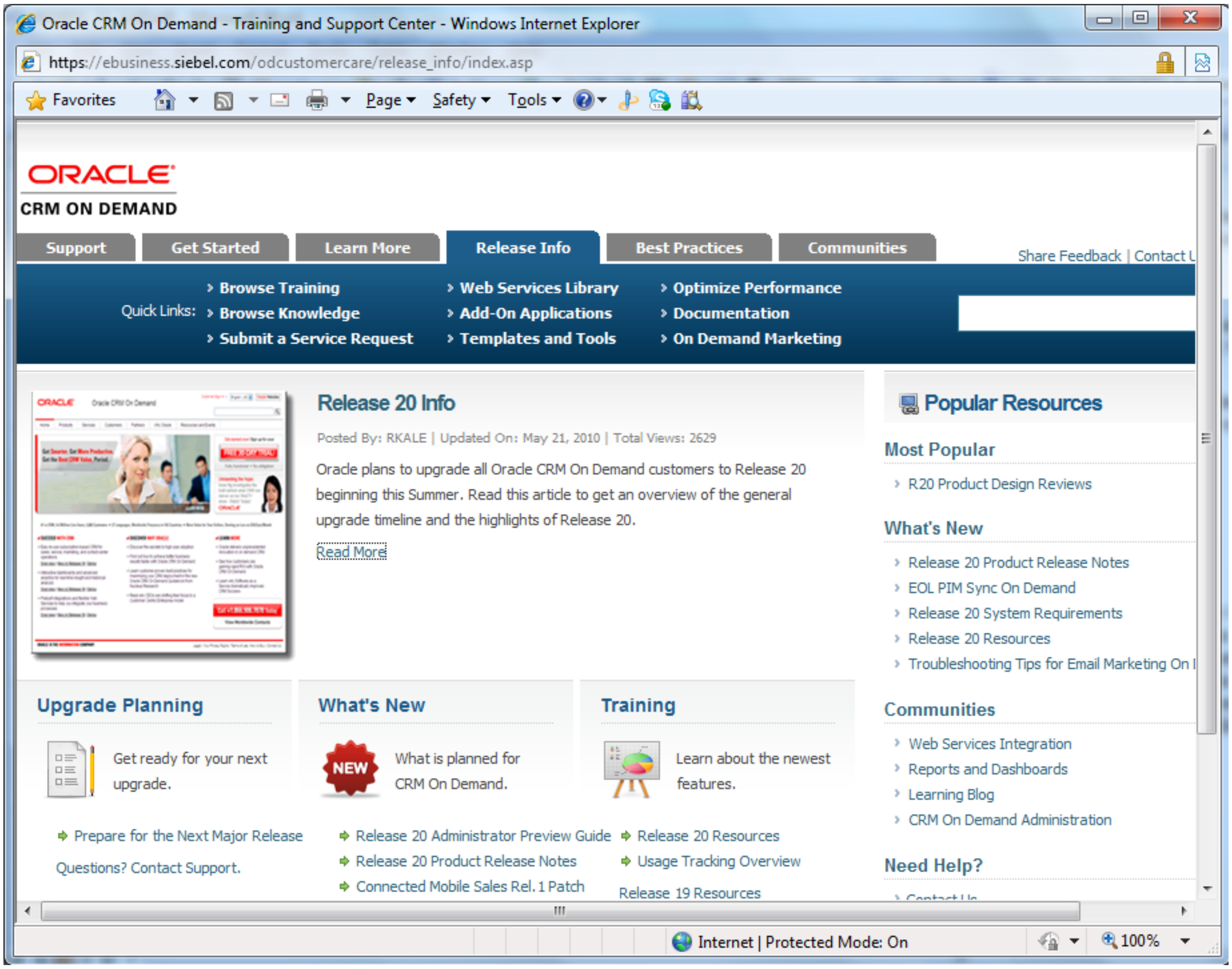
Items per page: 10 Go to page: < Prev Next >

Applied Filters: none
Sort By: Updated Date:Desc

Rating	Subject	Updated By
?	**weblink to create a task - how to close browser window** Posted on July 18, 2012 9:19 AM in Administration - CRMOD by User175888 , Last updated on July 18, 2012 9:19 AM , 0 Replies, 1 Views	User175888
?	**Adding Answers request to BI publisher freezes the data model and can't save** Posted on July 18, 2012 8:22 AM in Oracle Business Intelligence Enterprise Edition (OBIEE) by User349774 , Last updated on July 18, 2012 9:18 AM , 2 Replies, 10 Views	User349774
!	**Can you prohibit user from posting journals they uploaded/created?** Posted on July 18, 2012 5:02 AM in General Ledger by User230781 , Last updated on July 18, 2012 9:13 AM , 5 Replies, 23 Views	User230781

Popular Discussions

- Patch 6880880: Universal Insta (224848 views)
- Patch null: Oracle Database Or (120837 views)
- Patch 8202632: Oracle Databas (102104 views)
- Patch 6810189: Oracle Databas (90899 views)
- Patch 10404530: Oracle Databa (82718 views)
- Patch Recommended OS Cluste (36215 views)
- Patch Recommended OS Patch (36137 views)
- Patch 5983622: Oracle Fusion (32580 views)



Release 20 Info

Posted By: RKALE | Updated On: May 21, 2010 | Total Views: 2629

Oracle plans to upgrade all Oracle CRM On Demand customers to Release 20 beginning this Summer. Read this article to get an overview of the general upgrade timeline and the highlights of Release 20.

Read More

Upgrade Planning

Get ready for your next upgrade.

- Prepare for the Next Major Release

Questions? Contact Support.

What's New

What is planned for CRM On Demand.

- Release 20 Administrator Preview Guide
- Release 20 Product Release Notes
- Connected Mobile Sales Rel. 1 Patch

Training

Learn about the newest features.

- Release 20 Resources
- Usage Tracking Overview

Release 19 Resources

Popular Resources

Most Popular

- R20 Product Design Reviews

What's New

- Release 20 Product Release Notes
- EOL PIM Sync On Demand
- Release 20 System Requirements
- Release 20 Resources
- Troubleshooting Tips for Email Marketing On I

Communities

- Web Services Integration
- Reports and Dashboards
- Learning Blog
- CRM On Demand Administration

Need Help?