

Siebel 8.1.x Fundamentals

2 days

What You Will Learn:

Students learn to navigate and maintain data in Siebel applications by using common entities. Students explore built-in functionality in Siebel Sales and Siebel Call Center and then other cross-application features

Learn To:

- Create, modify, delete, and search for records
- Work with common Siebel business entities
- Use basic functionality of Siebel Sales and Siebel Call Center
- Navigate Siebel applications
- Describe other cross-application features
- Describe best practices for a Siebel implementation

Course Objectives:

- Describe Siebel Customer Relationship Management (CRM) applications
- Navigate the Siebel application user interface (UI)
- Work with common Siebel business entities
- User basic functionality of Siebel Sales and Siebel Call Center
- Describe common cross-application features
- Describe implementation best practices

Course Topics:

Using Siebel CRM

- Introducing Siebel CRM Applications
- Navigating
- Working with Data in the Siebel User Interface

Common Siebel Business Entities

- Representing customers with Accounts and Contacts
- Describing tasks with Activities
- Defining sales-related objects with Opportunities and Quotes
- Resolving customer issues with Service Requests
- Using Siebel business entities to implement business practices

Siebel Application Features

- Siebel Sales scenario: Opportunity Management
- Siebel Sales scenario: Forecasting
- Remote, TAS, Sales Methodologies
- Siebel Call Center: service scenario
- Email Response, SmartScript, Hoteling, and Multi-Tenancy

Other Siebel Features

- iHelp
- Inbox
- Reports
- Audit Trail
- Search
- Administration

Implementation Best Practices