

ADP Workforce Now Comprehensive Services Siebel CRM Workshop

Handout Manual

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Roseland**

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Course Introduction

Course Purpose

The purpose of this workshop is to provide participants with the knowledge, skills, and resources required to document client interactions in Siebel CRM.

Course Objectives

Upon completing this course, you will be prepared to:

- Create and maintain client contact records.
- Create, update, and close the appropriate transactional records.
- Search for and query Siebel CRM records.



Course Agenda

- Review and Navigating Siebel CRM
- Creating Contacts and Contact Alerts
- Creating, Updating, and Closing Transactional Records
- Searching and Querying for Records
- Role-Specific Workshops



Review and Navigating Siebel CRM



Review: Record Types

Match the record type with the corresponding definition.

Record Type	Definition
_____ employee	a. Products and services offered by ADP
_____ account	b. Products and services used by the client
_____ product	c. Client administrators
_____ asset	d. Transactional record to track client inquiries and interactions
_____ contact	e. Client employees and managers
_____ participant	f. Client companies we service
_____ service request	g. Actions taken to resolve a service request
_____ activity	h. Internal ADP associates and queues



Review: Account and Participant Records

1. Who creates account records?
 - a. Client administrators
 - b. Siebel CRM administrators
 - c. Siebel CRM users
 - d. Nightly feed from system of record
2. How are participant records created?
 - a. Client administrators
 - b. Siebel CRM administrators
 - c. Siebel CRM users
 - d. Nightly feed from system of record

 Review: Fields and Buttons

1. Which field will you use to assign a record to an employee or a queue?
2. Which button will you use to display or hide additional fields?

 Review: Functionality

1. You just closed a service request but it still displays in the My Service Requests list. How can you remove it from the list of service requests that display?
2. What function allows you to send email communications within Siebel CRM?

■ Activity: Logging on the Siebel CRM Training System

■ Instructions

Step	Action
1	In the email sent by your instructor, click to open the Siebel CRM training login page.
2	In the User ID field, enter the user ID assigned by your instructor.
3	In the Password field, enter the password assigned by your instructor.
4	Click Go . Result: The Siebel CRM Home page displays.

■ Important Information

To log on the Siebel CRM production database, you will need to download a digital certificate.

■ Best Practice

At the end of each day, log out of Siebel CRM by selecting **File >Logout**.

Navigation Review

■ Navigation Tips

- Siebel CRM uses tabs and subtabs to organize the records. Use the subtabs to view or enter additional information about the selected record.
- You can create or edit records in list view or form view.
- When creating or editing records, press the escape key to avoid saving the record.
- In the list view, click the row selector in the list to select that record for editing.
- In the list view, click a hyperlink to open that record in form view.
- Use the thread bar to navigate to a previous screen.

Activity: Scavenger Hunt

1. How can you display the Employees tab temporarily?
2. What is the main phone number of the FOXMAC account?
3. Which client contacts are associated with the FOXMAC account?
4. Where can you determine the last change made to an account?
5. What options do you have to save records in Siebel CRM?

Creating Contacts and Contact Alerts

Contact Security and Processes

■ Overview

- Before speaking to a client administrator, you will verify the person is currently listed as a contact in Siebel CRM. When a contact is not listed in Siebel CRM, you will follow proper security procedures to add the new contact.
- Before adding the new contact, you will also search to determine if the person is already in Siebel CRM as a participant. If you create a new contact record for an individual who is already listed as a participant, you will have two records for the same individual and impact record keeping.

■ Description

IF the new contact is:	THEN:
An existing participant	Email your data administrators to request that the participant be marked as a contact.
Not an existing participant	Follow your group's procedures to create a new contact record.

■ Additional Resources

For more information about proper security measures and procedures for maintaining contact records, refer to LUMIN solution number 31306 *Changing/Adding/Deleting a Contact in the Siebel CRM*.

■ Activity: Customizing Your Column Headings

■ Overview

When new fields are added to the Siebel CRM database, in some instances the new field will display automatically and in other instances, you must configure the system to display the field. After attending the Siebel CRM training, you will configure your production login to display the tabs and fields you will use on a regular basis.

■ Scenario

You are customizing Siebel CRM for initial use, and will add the Contact Role field to the Contacts screen. This will allow you to complete this field when you add a contact.

■ Instructions

Step	Action
1	Select the Accounts tab.
2	Click Accounts List .
3	Select the Contacts subtab.
4	Click Menu and select Columns Displayed .
5	Move the Contact Role field from the Available Columns area to the Selected Columns area.
6	Click Save .

■ Activity: Adding a Contact

■ Scenario

You receive authorization to speak to a third party contact for your assigned company. The contact is not already a participant. You will add the new contact to Siebel CRM.

■ Instructions: Add the Contact

Step	Action
1	On the Accounts tab, click Accounts List .
2	In the accounts filter menu, select All Accounts .
3	Select the FERBER entity account.
4	Select the Contacts subtab. Result: The account form applet and associated contacts list applet will display.
5	In the contacts list, click New . Result: The Add Contacts window opens.
6	In the Add Contacts window, click New .
7	To keep the Siebel CRM training environment compliant with ADP Security standards, enter the following information as shown: • Last Name: Your Last Name • First Name: Your First Name • Email Address: traincrm@adpcrm.com • Type: Third Party • Work Phone Number: (847) 555-1234
8	Click the Execute Query button to save the record and refresh the screen.

■ Instructions: Complete the Role Fields

Step	Action
1	In the contact list, scroll to locate the contact record you created.
2	In the Role field, click New . Result: A blank line appears in the roles list..
4	In the Role column, select Benefits Specialist .
5	Repeat steps 2 and 3 to specify the person is also the billing contact.
6	Click off the record to save your entries.

■ Activity: Viewing and Adding a Contact Alert

■ Overview

- Prior to creating a service request for a contact, you should determine if a contact alert exists. This will allow you to provide the best level of service for the client.
- When speaking with the client, you may learn important information that you should share with other Siebel CRM users by creating a new contact alert.

■ Scenario

You learned that the contact you just added is out of the office on Mondays and prefers to be contacted by email. You will determine if a contact alert containing this information exists, and if not, you will add the alert.

■ Instructions: Locate the Contact

Step	Action
1	Select the Contacts tab.
2	Click Contacts List .
3	In the contacts filter menu, select All Contacts and click Query .
4	In the EID column, type FERBER .
5	In the Last Name column, enter your last name.
6	Click Go .
Result: The contacts matching your search criteria display.	

■ Instructions: View a Contact Alert

Step	Action
1	On the Contacts tab, select the Contact Alert subtab.
2	If necessary, expand the width of the Alert field to view the entire text.

■ Instructions: Add a Contact Alert

Step	Action
1	On the Contacts tab, select the Contact Alert subtab.
2	Click New .
3	In the Alert field, type Out of the office on Monday and prefers to be contacted via email .
4	In the Functional BU field, select MA Comprehensive Services
5	Save the contact alert.

■ ■ ■ Creating, Updating, and Closing Transactional Records

■ ■ The New Service Request Process

■ Overview

When you receive a request from a contact or participant, you will create a new service request following these steps. Depending on the situation, you will complete different steps.

■ Description

Stage	Description	Required
1	Verify the identity of the contact or participant.	Yes
2	Create a new service request and complete the required fields.	Yes
3	Attach correspondence to the service request.	
4	Create activities.	
5	Assign an activity plan.	
6	Create child service requests.	
7	Assign service request, child service request, or activities to a queue.	
8	Close any activities associated with the service request.	
9	Close the service request.	Yes

■ ■ Activities, Activity Plans, and Child Service Requests

■ Overview

The decision of whether to use an activity or a child service request depends on who will complete the task. Activity plans are predefined lists of activities that can be applied to a service request to save time with data entry.

■ Description

IF:	THEN:
You are responsible for the task	Create an activity
An activity plan exists	Assign the activity plan to the service request
Someone else is responsible for the task or needs to provide assistance	Create a child service request

Creating Service Requests: Role Differences

■ Overview

You have various ways to complete tasks in Siebel CRM. When creating service requests, you want to begin on the tab that will make the process more efficient for someone in your role.

■ Guidelines

IF your role is:	THEN start creating a service request from the:
Benefits Representative	Participants tab
Employee Service Center Specialist	Participants tab
Any other role	Contacts tab

■ Note

Computer Telephony Integration (CTI) determines if the number of the caller belongs to a participant or contact and opens the appropriate tab for you. If a match is not identified, Siebel CRM will open the Accounts tab.

■ Service Request Scenarios

■ Overview

The situation determines which steps you should take and which transactional records you should use to document the resolution of the client's request.

■ Description

After verifying the caller's identity, complete the steps that match your scenario.

IF:	THEN:
You can resolve the client's question while on the phone.	1. Create a service request. 2. Close the service request.
Another group should resolve the service request.	1. Create a service request. 2. Assign the service request to the appropriate queue.
You need to retain ownership of the parent service request and need assistance from another team member or group.	1. Create a service request. 2. Create a child service request. 3. Assign the child service request to the appropriate queue. 4. Monitor the status of the child service request. 5. Close the service request.
You need to conduct more research or complete tasks to resolve the client's request.	1. Create a service request. 2. Create activities to track the additional tasks and progress. 3. Mark the activities complete. 4. Close the service request.
You received a common request that has an activity plan for efficiency.	1. Create a service request. 2. Assign an activity plan. 3. Assign the activities to a queue, if applicable. 4. Close the service request.
A client called about a service request that is now closed. You need to take additional action regarding the client's request.	1. Create a new service request. 2. Relate the new service request to the closed service request. 3. Close the new service request.

■ Activity: Assigning a Service Request to a Queue

■ Overview

When you receive a request that another group should resolve, create the service request and assign it to the appropriate queue.

■ Scenario

You are an Employee Service Center representative and you receive a request to update the employee handbook. You will assign a request for support to the ASO HR Benefits Queue.

■ Instructions

Step	Action
1	Select a KRATZKY contact or participant.
2	Open a new service request.
3	In the Abstract field, type (Your Initials) Client has question on the employee handbook.
4	Enter the following information: • Super Type: MA Comprehensive Services • Type: HR & Benefits Services • Sub Type: EE Handbook • Source: Call - Incoming • Due Date: 2 days from today • SR Cause: Administrator or Participant
5	In the Owner field, click the selection box. Result: The Pick Service Request Owner window opens.
6	Select -ASO-HR-Benefits .
7	Click OK . Result: The -ASO-HR-Benefits queue displays in the Owner field.
8	Save the request. Result: Your request is sent to the queue.

■ Tips

When searching in the production Siebel CRM site for the appropriate queue:

- Comprehensive HR queues start with –WFNHR
- Comprehensive Benefits queues start with -WFNBA
- Comprehensive Payroll queues start with -WFNCP
- Technical Services queues start with –WFNCS

Refer to the Comprehensive Services SharePoint site for a listing of Types and Sub Types with descriptions.

■ Activity: Creating a Service Request and a Child Service Request

■ Overview

When you need to retain ownership of the parent service request and require assistance from another group or associate, create a child service request and assign it to the appropriate queue.

■ Scenario

The client wants to add a new benefit plan in the HR and Benefits module and create a new report in ADP Reporting to report on the benefits data. You are able to guide the client through creating the benefit plan, but need assistance from a technical specialist with creating the report.

■ Instructions: Create the Service Request

Step	Action
1	Select a FERBER contact or participant.
2	Open a new service request.
3	In the Abstract field, type Create new dental benefit plan in HR and Benefits and new report in ADP Reporting .
4	In the form applet, enter or select the following values for the service request: • Super Type: MA Comprehensive Services • Type: HR & Benefits Services • Sub Type: Benefit Plan • Asset: ADP HR Benefits Solutions • Source: Call - Incoming • Severity: 5 - Service Level Standard • Due Date: 2 weeks from today • SR Cause: Administrator or Participant
5	Save the service request. Result: The service request displays in the My Service Requests section.

■ Activity: Creating a Service Request and a Child Service Request (Continued)

■ Scenario

You require additional assistance to create the new benefit report in ADP Reporting.

■ Instructions: Create the Child Service Request

Step	Action
1	Click the SR number hyperlink to display the service request in the form view.
2	Select the Child Service Requests subtab.
3	Click New . Result: A new child service request is generated.
4	In the Due Date field, select today's date.
5	In the Abstract field, type Question about ADP Reporting login .
6	In the Owner field, click the selection box. Result: The Pick Service Request Owner window opens.
7	Select -ASO-PCTECHSVS .
8	Click OK . Result: The -ASO-PCTECHSVS queue displays in the Owner field.
9	Save the child service request.

■ Activity: Adding an Activity to a Service Request

■ Overview

When you need to conduct additional research or complete tasks to resolve a client's request, use activities to track your progress.

■ Scenario

You are a risk and safety specialist and have received a call regarding a client's safety program. You will document the client's question and request a copy of the client's current safety program.

■ Instructions: Create the Service Request

Step	Action
1	Select a KRATZKY contact or participant.
2	Open a new service request.
3	Create a service request using the following criteria: • Abstract: Question on Safety Program • Super Type: MA Comprehensive Services • Type: Risk & Safety • Sub Type: Manual • Source: Call - Incoming • Due Date: 1 Week • SR Cause: Administrator or Participant
4	Save the service request.
5	Write down the service request number. You will refer to this number in another exercise.

■ Instructions: Create and Close the Initial Activities

Step	Action
1	Click the SR number hyperlink to display the service request in the form view.
2	Select the Activities subtab.
3	Click New .
4	In the form section, enter the following information: • Activity Type: Research • Description: Request a copy of the client's risk and safety program.
5	In the Status list, select Done . Result: The activity is now closed.
6	Click New .
7	In the form section, enter the following information: • Activity Type: Follow Up • Description: Follow up on the client's risk and safety program.
8	In the Status list, select Pending .

■ Activity: Closing a Service Request with Activities

■ Scenario

You have received the client's risk and safety program and will review the information to provide the client with recommendations. You will document the progress using activities and close the service request.

■ Instructions

Step	Action
1	Change the status of the Follow Up activity to Done .
2	Click New .
3	In the form section, enter the following information: • Activity Type: Call-Outbound • Description: Call Client to Discuss Safety Program.
4	In the Status list, select Done . Result: The activity is now closed.
5	Scroll to the top of the page.
6	In the service request Asset field, select ASO Product Offering .
7	Click Close SR .

■ Important Information

All activities need to have a status of **done** or **remain open** before the service request can be closed.

■ Activity: Applying an Activity Plan to a Service Request

■ Overview

When you receive a common request, determine if an activity plan exists. Applying an activity plan creates a standard list of activities and associates those activities with your service request to save you time. In some instances, you will also assign the activities to a queue.

■ Scenario

You are a relationship manager who needs to request a new client setup. An activity plan exists for this type of request.

■ Instructions: Create the Service Request

Step	Action
1	Select a KRATZKY contact or participant.
2	Open a new service request.
3	Create a service request using the following criteria: • Abstract: New client admin implementation actions • Super Type: MA Comprehensive Services • Type: Company Administration • Subtype: Material/Supplies • Source: Internal Request • Due Date: 2 Weeks • SR Cause: Special Projects
4	Click the SR number hyperlink to display the service request in the form view.

■ Instructions: Apply the Activity Plan

Step	Action
1	Select the Activity Plans subtab.
2	Click New .
3	In the Business Group field, select Major Accounts .
4	In the Template field, click the selection box. Result: The Pick Activity Plan Template window opens.
5	Select RM New Client Start and click Pick .
6	Save the activity plan assignment.

■ Instructions: Update and Assign the Activities

Step	Action
1	Select the Activities subtab.
2	Update and assign the activities as needed.

■ Activity: Relating Service Requests

■ Overview

You cannot reopen service requests in Siebel CRM. If a client calls back about a service request that is now closed and you need to take additional action, create a new service request and relate it to the closed service request.

■ Scenario

The client called back to request additional changes to the risk and safety program. Since the original request is closed, you will create a new request and relate it to the original request.

■ Instructions

Step	Action
1	Select a KRATZKY contact or participant.
2	Open a new service request.
1	Create a new service request with the following information: • Abstract: Requested additional change to safety program. • Super Type: MA Comprehensive Services • Type: Risk & Safety • Subtype: Safety Training • Source: Call-Incoming • Due Date: 1 Week From Today • SR Cause: Special Projects
2	Select the Related SR's subtab.
3	Click New . Result: The Add Service Requests window opens.
4	In the Starting With field, enter your SR number from the Adding an Activity to a Service Request activity.
5	Click Add . Result: The service request displays in the Related SR's section.
6	In the service request Asset field, select ASO Product Offering .
7	Click Close SR .

Review: Service Request Scenarios

1. The client misdialed and should have been put in touch with a payroll consultant. What should you do after gathering more information from the client?
 - a. Create a service request, create a child service request, and assign the child service request to the appropriate queue.
 - b. Create a service request, create an activity, and assign the activity to the appropriate queue.
 - c. Create a service request and assign the service request to the appropriate queue.
 - d. Create a service request, assign an activity plan, and complete the activities.

2. A participant got married and needs to adjust her benefit enrollments to cover her spouse. What should the benefits representative do after gathering more information from the client?
 - a. Create a service request, create a child service request, and assign the child service request to the appropriate queue.
 - b. Create a service request, create an activity, and assign the activity to the appropriate queue.
 - c. Create a service request and assign the service request to the appropriate queue.
 - d. Create a service request, assign an activity plan, and complete the activities.



Searching and Querying for Records



Best Practices for Locating Information in Siebel CRM

- Enter several search parameters or the query will take a long time to display results.
- Some search fields are case sensitive, so you may need to enter the data multiple ways to locate the record.
- Use the EID field instead of the Account Name field when running a query because the EID field data is not case sensitive.
- When searching for service requests, be sure to specify the status, or the system will search for all open and closed service requests.
- Use the asterisk wildcard to save time with data entry.
- It is possible to view and update service requests for other business units. Be sure to search for and edit requests that belong to your clients and business unit.



Activity: Locating Service Requests

Overview

You can use various screens to locate service requests. In general, you will use the same tab you use to create service requests to check the status of service requests.

Scenario

You would like to check the status of a service request for your KRATZKY client.

Instructions

Step	Action
1	Select a KRATZKY contact or participant.
2	Select the Service Requests subtab.
3	Review the service request abstract and status.
4	To check the status of related activities or child service requests, click the SR number hyperlink to display the service request in the form view.
5	Explore the service request subtabs to determine the associate responsible for resolving the request and the status of any activities or child service requests.

■ Activity: Adding an Employee to the Account Team

■ Overview

When Siebel CRM Administrators create an account record, they assign the relationship manager to the account team. If you support a small number of clients, it may be beneficial for you to assign yourself to the account team, too. This allows you to locate the account records you support more efficiently. When you add your user ID to the Account Team field, the account record will display in your Accounts list view when you select the My Accounts filter. In addition, if you report to another user in Siebel CRM, the user will be able to view accounts to which you are assigned when the My Team's Accounts filter is selected.

■ Instructions

Step	Action
1	Select the Accounts tab.
2	In the Search section, in the EID field, type FERBER .
3	Click Go . Result: The accounts associated with your search criteria displays.
4	In the search results, select the FERBER entity record.
5	In the form applet, in the Account Team field, click the selection box. Result: The Account Team Members window displays.
6	In the Starting With field, enter your Training ID and click Go . Result: Your user ID will display in the Available window.
7	In the Available section, select your User ID and click Add .
8	Click OK . Result: Your User ID has been added to the Account team for FERBER.

■ Best Practice

The relationship manager is the primary associate responsible for servicing the client. Do not change the value in the Primary field in the Account Team Members window.

■ Activity: Receiving Service Requests

■ Scenario

You are ready to start your day by locating any service requests assigned to you or a queue you manage.

■ Instructions: Locate Service Requests Assigned to You

Step	Action
1	Select the Service Requests tab.
2	Click Service Request List .
3	By default, the My Service Requests filter is applied. Result: All service requests assigned to you display in the list.

■ Instructions: Locate Service Requests Assigned to a Queue You Manage

Step	Action
1	Select the Service Requests tab.
2	Click Service Request List .
3	In the service request filter menu, select All Service Requests .
4	Click Query .
5	In the Owner field, select -ASO-HR-Benefits .
6	In the Status field, select Open .
7	Click Go . Result: All open service requests assigned to the HR Benefits queue display.

■ Instructions: Assign a Service Request to You

Step	Action
1	In the form view of the service request, in the Owner field, select your login ID.
2	Save the changes to the service request.

■ Activity: Locating Records Using the Ultimate Service Requests Screens

■ Overview

The Siebel CRM system automatically generates an Ultimate Service Request number to track all related parent, child, and grandchild relationships. You can use the Ultimate Service Request screens to locate associated records.

■ Scenario

You are researching the status of a client's request and would like to see all records associated with that service request on one screen.

■ Instructions

Step	Action
1	Select the Ultimate Service Requests tab. Result: The Ultimate Service Requests list displays.
2	Click the New column header twice. Result: The most recent requests display at the top.
3	Click the row selector to the left of the service request record you wish to view.
4	Click Ultimate SR Full Detail to display all transactional records associated with this service request.



Workshop: Relationship Manager



New Client Setup

Relationship managers can keep track of all aspects of a new client's setup to ensure timely completion of the associated tasks. The relationship manager creates a service request, assigns an activity plan, and assigns the activities to the appropriate queue. Refer to your internal process documentation to determine the appropriate queue to select in the production Siebel CRM database.

■ Scenario

You will create a service request and assign an activity plan to ensure that all internal items related to setting up a new client are completed. Since the relationship manager owns the service request, it is easy to locate the service request and check the status of the associated activities from the Home tab.

■ Instructions

1. Create a service request for the new client setup. Choose super type MA Comprehensive Services, SR type Company Administration and subtype Material/Supplies.
2. Assign the activity plan to the service request.
3. Assign each activity to the ASO HR Benefits queue.
4. Locate the service request on the Home tab and verify the activities are all assigned to the correct queue.

■ Periodic Client Activities

The Relationship Manager will conduct periodic client activities such as client calls and escalate requests for service that they receive.

■ Scenario

You are conducting a periodic client call for FERBER, during which the client asks for support with how to edit a benefit plan in the HR & Benefits module. Since the client has transitioned to service, the relationship manager will assign this request to the service team.

■ Instructions

Step	Role	Action
1	Service Request Creator	Create a service request to document the periodic service call with the super type MA Comprehensive Services, SR type Company Administration and subtype Relationship Management
2	Service Request Creator	Create a Call - Outgoing activity and mark it as done.
3	Service Request Creator	Write down the service request number.
4	Service Request Creator	Select the ASO Product Offering asset and close the service request.
5	Service Request Creator	Create a service request for the HR issue with the super type MA Comprehensive Services, SR type HR & Benefits and subtype Benefit Plan. Relate the service request to the periodic service call request.
6	Service Request Creator	Create a note stating, "see attachment" and attach the PeriodicClientActivities.doc file.
7	Service Request Creator	Assign the service request to the ASO HR Benefits queue.
8	Service Request Creator	Locate the service request for this client to check the status.

Workshop: Payroll Specialist and Payroll Consultant

Benefit Enrollment Dataflow

Scenario

A FERBER client administrator calls you regarding a benefit enrollment that was entered in the HR and Benefits module that does not display in the Payroll module. You conduct additional research and determine the employee is eligible for the plan and it should take effect in payroll during the next pay period.

Instructions

1. Confirm that Herbert Hoover is the contact for FERBER.
2. Create a service request with super type MA Comprehensive Services, SR type HR & Benefits Services and subtype Connection Inquiry.
3. Enter a description of the inquiry.
4. Create an activity to document that you will conduct additional research.
5. Update the activity to reflect the actions taken to resolve the request and mark the activity as done.
6. Select the Pay eXpert asset.
7. Close the service request.

Technical Assistance

Scenario

You are trying to help a client fill out a form online but the client has trouble accessing the support center. You confirmed the client is using the right login and reset the client's password, but the client still receives an error. You will request assistance from technical services.

Instructions: Determine Data to Include

What information should you include in the child service request for the technical specialist? Write your response in the space provided.

Instructions: Complete the Siebel CRM Steps

1. Create a service request with the super type MA Comprehensive Services, SR type Technical Issues and subtype Data/Access/Security.
2. Create a child service request and include the details you listed above to assist the technical specialist.
3. Assign the child service request to the ASO-PCTECHSVS queue.
4. Check the status of the child service request.



Workshop: HR Consultant



HR and Benefits Reports

■ Scenario

A FERBER client administrator calls you with an inquiry on setting up and running a comparison report in the HR & Benefits module. You are able to resolve the inquiry during the call.

■ Instructions

1. Confirm that Herbert Hoover is the contact for FERBER.
2. Create a service request with super type MA Comprehensive Services , SR type HR & Benefits Services and subtype Reporting.
3. Enter a description of the inquiry.
4. Select the ADP HR/Benefits Solution asset.
5. Close the service request.



Carrier Connection

■ Scenario

Herbert Hoover, a FERBER client administrator, contacts you because an employee is eligible for a benefit plan, but the information did not get to the carrier. You confirm the employee's enrollment in the HR & Benefits module, but realize the employee was not on the carrier file because this employee is in a location that is not being captured. You will need assistance from Connection Services.

■ Instructions

1. Create a service request with super type MA Comprehensive Services , type HR & Benefits Services and subtype Carrier Connection Inquiry.
2. Create an activity to document that you sent an email to the HR & Benefits module Connection Services team. Leave this activity open for now to indicate that you are waiting for a response.
3. Create an activity to document the resolution you received from the HR/Benefits team and close the activity.
4. Close the initial activity representing the email you sent to the Connections Services team.
5. Create a Call-Outbound activity. Document the communication of the resolution to the client.
6. Close the Call-Outbound activity.
7. Add the ADP HR/Benefits Solution asset to the service request.
8. Close the service request.



Workshop: Documentation Specialist and Service Support Specialist

■ Scenario

The relationship manager has created a service request for an employee handbook from Herbert Hoover at FERBER. You will receive an activity to create the employee handbook. Once complete, the relationship manager will post the completed handbook to the client's ADP Workforce Now Web site.

■ Instructions

Step	Role	Action
1	Learning Specialist	Create a service request with super type MA Comprehensive Services, type HR & Benefits Services, subtype EE Handbook.
2	Learning Specialist	Create a child service request and document the request. Include the intended recipient's name in the description.
3	Learning Specialist	Assign the child service request to the ASO HR Benefits queue.
4	Service Request Receiver	Locate the child service request with your name in the description in the ASO HR Benefits queue. Add comments to the child service request that the handbook is complete and attach the EEHandbook.doc file.
5	Service Request Receiver	Close the child service request.
6	Learning Specialist	Create another child service request for three printed copies of the employee handbook. Include the intended recipient's name in the description.
7	Learning Specialist	Assign the child service request to the ASO HR Benefits queue.
8	Service Request Receiver	Locate the child service request with your name in the description in the ASO HR Benefits queue. Add comments to the child service request that the order was placed and the expected day of delivery.
9	Service Request Receiver	Close the child service request.
10	Learning Specialist	Close the service request.

Workshop: Employee Service Center Representative

Employee Access Assistance

Scenario

A FERBER employee, John Bardeen, calls you for assistance enrolling in benefit plans after a life event. You are able to resolve the inquiry during the call.

Instructions

1. Confirm that the participant is in Siebel CRM and works for FERBER.
2. Create a service request with super type MA Comprehensive Services, SR type HR & Benefits and subtype Dependent / Life Event.
3. Enter a description of the inquiry.
4. Select the ADP HR/Benefits Solution asset.
5. Close the service request.

Escalate a Payroll Inquiry

Scenario

John Bardeen from FERBER contacts you again, this time with a payroll question that you will need to escalate to a payroll consultant. You will create the service request and assign a child service request to the ASO Payroll queue.

Instructions

Step	Role	Action
1	Service Request Creator	Create a service request with super type MA Comprehensive Services, SR type Payroll Services and subtype Check Issues. Enter a description of the inquiry.
2	Service Request Creator	Create a child service request. Document the request to respond to the participant inquiry.
3	Service Request Creator	Assign the child service request to the ASO Payroll queue.
4	Learning Specialist	Close the child service request.
5	Service Request Creator	Create a Call-Outbound activity. Document the communication of the resolution to the participant.
6	Service Request Creator	Close the Call-Outbound activity.
7	Service Request Creator	Add the Pay eXpert asset to the service request.
8	Service Request Creator	Close the service request.



Workshop: Benefits Representative



Domestic Relationship

■ Scenario

A KRATZKY employee, Isaac Newton, calls to enroll a non-spouse and wants to know the tax implications. You advise Isaac on how post-tax deductions are handled by payroll.

■ Instructions

1. Confirm that the participant is in Siebel CRM and works for KRATZKY.
2. Create a service request with super type MA Comprehensive Services, SR type Payroll Services and subtype Deductions Post Tax.
3. Enter a description of the inquiry.
4. Select the ADP HR/Benefits Solution asset.
5. Close the service request.



Birth of a Child

■ Scenario

A FERBER employee, John Bardeen, has called you to report the birth of a child. You ask for the dependent information and proceed to enroll the child in the necessary plans. You also let the client know the new plan cost and summarize the benefit enrollment.

■ Instructions

1. Confirm that the participant is in Siebel CRM and works for FERBER.
2. Create a service request with super type MA Comprehensive Services, SR type HR & Benefits Services and subtype Dependent / Life Event.
3. Enter a description of the inquiry.
4. Create an Add/Create/Setup activity to enter the dependent information and enroll the child in the necessary plans.
5. Create a Review/Audit/Test activity to confirm the enrollment information.
6. Close the activities.
7. Select the ADP HR/Benefits Solution asset.
8. Close the service request.



Workshop: Technical Specialist



Warm Transfer

■ Overview

When Comprehensive Services associates are on the phone with a client and require additional assistance, the associate may perform a warm transfer to a technical specialist. In those instances, the technical specialist will create a service request to document the interaction with the client.

■ Scenario

A payroll consultant helped the client log on to his ADP Workforce Now Web site, but the client receives an error message when trying to view iPay statements. The payroll consultant warm transferred the call to the technical specialist, who will now document the interaction with the client in a service request.

■ Instructions

1. Create a service request with super type MA Comprehensive Services, SR type Technical Issues and subtype Data/Access/Security.
2. Enter a description of the inquiry.
3. Create an activity to document the actions taken to resolve the request in Netsecure.
4. Mark the activity as done.
5. Select the ADP HR/Benefits Solution asset.
6. Close the service request.



Course Closing



Course Objectives

Now that you have completed this course, you are prepared to:

- Create and maintain client contact records.
- Create, update, and close the appropriate transactional records.
- Search for and query Siebel CRM records.



Next Steps

- Complete the course test
- Review LUMIN solution number 31306 Changing/Adding/Deleting a Contact in the Siebel CRM.
- Review your group's Siebel CRM process documentation (if applicable).
- Review the documentation regarding pre-defined queries on ADP At Your Service.

Appendix

Contents

Service Request Types

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Service Request Types

■ Overview

When creating a service request you will need to specify the type and subtype of the request. This sample list of the possible service request types and subtypes may change over time.

■ Types and Subtypes

Type	Subtypes
Application Support	• Data Connections • Data Integrity • Employee Maintenance • Import/Export • Navigation • Password reset • Registration • Setup/Configuration • System Outage • System Performance • Upgrade/Migration
Benefits	• Beneficiary Changes • Benefit Plans • Carrier Related Inquiry • Claims • COBRA • Documents/Packets • Enrollment Services • OE Setup/Changes
Company Administration	• Billing • Client Changes • Client Site Visit • Communications • Contact Maintenance • Custom Program • Material/Supplies • Proactive Communication • Quality Survey • Relationship Management • Security Breach • Ervine Analysis • Termination • Training/Enrollment • Transition to Service • Vendor Referral

■ Types and Descriptions (Continued)

Type	Subtypes
HR Administration	• Benchmark Request • Documentation/Form Review • EE Handbook • Employee Relations • Federal/State Regulations • Generic Best Practice • Job Description • Performance Management • Policy Sample/Review • Reduction in Force
Image	• Bankruptcy • Child Support • Correspondence - Benefits • Correspondence - Payroll • Court Order • Creditor Garnishment • Garnishment Answer • Garnishment Fax/Mail • Garnishment Termination Letter • Non Employee Letter/Answer • Returned Mail - Garnishment • Spousal Support Withholding • Student Loan Garnishment • Tax Levy - Federal • Tax Levy - State • Wage Withholding - Other • Writs
Invoice Administration	• Approval • Client Notification • Discrepancies • Errors • Escalation • Functional Analysis • Monthly Administration • Premium Remittance • Processing • Reconciliation • Transition to Service • Validation • Vendor Bill Tracking

■ Types and Descriptions (Continued)

Type	Subtypes
Leave Administration	• Documentation • FMLA hours • Inquiries • Intake Process • Open Leave Case • Payments
Payroll Processing	• Employee Transaction • Payroll Submission
Payroll Services	• Additional Payroll • Check Inquiry • Delivery • Employee Inquiry • Mainframe Access/Support • Payroll Regulations • Payroll Rerun • Processing Error • Standard Reports • Stop Payment/ DD Recall /Void
PTO Accruals	• Change Request • Employee Balance Inquiry • Employee Maintenance • New accrual • Troubleshoot
Reporting	• Ad-hoc • Audit Reports • Change Request • Inquiries • Rerun • Setup/Configuration
Tax Processing	• Amendment/Exception • Impound/Invoice • Reports • SUI Rate Change • Tracer • W2/W3 Tax Forms

Explore: Accounts List

EID	Account Name	Billing Name	Legal Name	Processing Region	Site	Status	Category	Account Type	Origin	ISI Company Cod
FERBER	Ferber Bros. Furniture	Ferber Bros. Furnitu			FERBER 2	Active	Account	Major		
FOXMAC	Fox, MacDonald & Associates	Fox, MacDonald & A			FOXMAC	Active	Account	Major		
KRATZKY	Kratzky Health Foods	Kratzky Health Food			KRATZKY2	Active	Account	Major		
TRIVALLEY	Tri-Valley Consulting	Tri-Valley Consulting		0170	TRIVALLEY	Active	Account	Major		

Elements and Descriptions

Element	Description
EID	Short name that identifies the entity (parent) account record. This is the only required field. The EID code is restricted to nine characters and created by the Data Administrator.
Category	The Category field at the account level identifies the entity (parent) account.
Processing Region	Identifies the payroll processing region.
Account Name	The full name of the client account.
Site	The client's company code.
Support Hold	Identifies that an account is on a financial support hold.
Industries	Provides users the ability to perform market analysis by industry.
Hot Client	Identifies a client who may require special attention.
Status	Status of the account with ADP (Implementation, Active, Terminated, etc.).
Account Type	Type of account for ADP (Enterprise, National, National-COS, Major).
Account ID	Unique account identifier assigned by ADP.

Important Information

Account records are created and modified by users identified as Siebel CRM Administrators. Certain fields can be updated by all users.

Additional Resources

You can customize the structure of your sections and other features of Siebel CRM. For more information on customizing Siebel CRM, see the *User preferences*, v. 7.8 job aid on ADP: At Your Service.

■ Explore: Account Form Tabs

The screenshot shows the 'Kratzky Health Foods' account form. At the top, there is a navigation bar with tabs: eMail SLA, Alert Admin, BCC, Survey, SLA, Activities, Attachments, Contacts, Participants, Service Requests, Assets, Issues, Retention, Audit Trail, More Info, Notes, and Subaccount Detail. Below the tabs, the form is divided into several sections. On the left, there are fields for Hot Client (checked), EID (KRATZKY), Site (KRATZKY), Account ID, Processing Region, Entity #, Category (Account), and Tax Branch Code. In the center, there are fields for Support Hold, Account Alert, Billing Name (Kratzky Health Foods), Account Name (Kratzky Health Foods), Legal Name, Former Name, Parent Account, and Main Phone Number ((510) 889-9700). On the right, there are fields for Address Line 1 (14369 Mission BLVD), Address Line 2, Time Zone (Pacific Time (US & C)), City (Hayward), State/Province (CA), Zip/Postal Code (94545), Country, Reference, Account Team (SADMIN), Account Type (Major), Account Status (Active), Live Date, Initial Date, Termination Date, and Support Status.

■ Elements and Descriptions

Element	Description
eMail SLA	Details about the client's service level agreement including the opening hours, closing hours, toll free number, and comments.
Account Alert	Provides all users visibility into alerts related to an account.
Survey	Displays survey information about a client including asset number, contact first name, contact last name, survey date, survey score, surveys sent, survey responses, referenceable reason, unreferenceable reason, reference date and reference comments.
Activities	Details about each discrete action performed by the associates who provide service to clients.
Attachments	URLs, emails, and documents associated with the selected account.
BCC Tab	Identifies the service teams responsible for the client.
Contacts	Details about the client's employees who interact with ADP associates.
Participants	Details about the client's employees who are enrolled in one of the services.
Service Requests	Details about the requests for service associated to the account.
Assets	Instances of the products and services purchased by the client.
Audit Trail	Displays changes made to certain fields of the account record.
More Info	Additional view of data for the selected account.
Notes	Notations about the selected account entered by Siebel CRM users.
Subaccount Detail	Details about the sub accounts associated with a parent account.

■ Explore: Contacts List

File

Edit

View

Navigate

Query

Tools

Help

Queries:

All Contacts

Contact:

Home

Accounts

Participants

Contacts

Invoices

Roles

Service Requests

Ultimate Service Requests

Projects

Tasks

Ultimate Accounts

Activities

Assets

Quality

Contacts Home

Contacts List

My Contacts

Menu

New

Query

Edit

Last Name	First Name	Email	EID	Account Name	Contact Status	Participant	Phone #	Account ID
> Albright	Anthony		FOXMAC	Fox, MacDonald & A	Active			
Castro	Karla				Active			
Castro	Karla		FERBER	Ferber Bros. Furnitu	Active			
Castro	Karla				Active			
hodgeon	c		FERBER	Ferber Bros. Furnitu	Active			
Crawfo	Cynthia		FERBER	Ferber Bros. Furnitu	Active			
Crawford	Cynthia		FERBER	Ferber Bros. Furnitu	Active			
Albright	Anthony				Active			
Forrest	James		FERBER	Ferber Bros. Furnitu	Active			
Joseph	Ed		FERBER	Ferber Bros. Furnitu	Active			

■ Elements and Descriptions

Element	Description
Last Name	Last name of the contact
First Name	First name of the contact
Email	Primary email address for the contact
EID	Short name that identifies the account record to whom the contact is assigned; for contacts associated to more than one account record, the primary account record is displayed in this field
Account Name	Identifies the entity or parent account.
Contact Status	Status of the contact with the account
Participant	Identifies if the contact is also a participant
Work Phone #	Primary work telephone number for the contact

■ Explore: Contacts Form Tabs

■ Tabs and Descriptions

Element	Description
More Info	Displays details about the contact record
Activities	Details about each discrete action performed by the associates who provide service to clients
Notes	Notations about the selected account entered by Siebel CRM users
Service Requests	Details about the requests for service associated to the account
Attachments	URLs, emails, and documents associated with the selected account
Client Network	A network of associates who have a direct relationship with an account or a client contact. The client network view of the Contacts screen contains data about the relationships between associates and client contacts
Roles	Describes the role within the organization such as administrator, Benefits, HR, or third party
Contact Alert	Provides critical support information for the individual contact

Explore: Participant Records

File Edit View Navigate Query Tools Help									
Participant: Queries:									
Home	Accounts	Participants	Contacts	Invoices	Roles	Service Requests	Ultimate Service Requests	Projects	Tasks
ADP Participant List Participant Source Keys									
Participants	Menu	Query	Query Results						
Last Name	First Name	Employee #	Birth Date	Phone #	EID	Account Name	Site		
> Axelrod	Julius	14456			KRATZKY	Kratzky Health Food	KRATZKY		
Dresselhaus	Mildred	14234			KRATZKY	Kratzky Health Food	KRATZKY		
Oledtsch	Ellen	14789			KRATZKY	Kratzky Health Food	KRATZKY		
Newton	Issac	14678			KRATZKY	Kratzky Health Food	KRATZKY		
Tronkey	Ma				KRATZKY	Kratzky Health Food	KRATZKY2		

Elements and Descriptions

Field	Description
Last Name	Last name of the participant.
First Name	First name of the participant.
Employee #	Client-specific employee number assigned to the participant
Birth Date	Date of birth of the participant.
Phone #	Phone number of the participant.
Account Name	Identifies the entity or parent account and is a required field for service requests.
EID	Short name that identifies the account record to whom the contact is assigned; for contacts associated to more than one account record, the primary account record is displayed in this field.

■ Explore: Participant Form Tabs

The screenshot shows the ADP Participant Form interface. At the top, there is a menu bar with options: File, Edit, View, Navigate, Query, Tools, Help. Below this is a sub-menu bar with tabs: Home, Accounts, Participants, Contacts, Invoices, Roles, Service Requests, Ultimate Service Requests, Projects, Tasks, Ultimate Accounts, Activities, Assets, Quality. The 'Participants' tab is selected. Below the tabs, there is a 'Participant' section with a 'Menu' dropdown and a 'Query' button. The form contains several fields for participant information, including Participant #, Employee #, Employee File #, Last Name, First Name, Preferred Name, Middle Initial, Birth Date, Marital Status, Gender, Prefix, ID, Site, Account Name, ISI Registration Code, ISI Company Code, ISI User Name, Citizenship Status, Country of Origin 1, Country of Origin 2, Comp/Paygroup, Address Line 1, Address Line 2, City, State/Province, Zip/Postal Code, Country, Phone #, and Email. There is also a 'Special Instructions' field.

■ Tabs and Descriptions

Tab	Description
More Info	Displays details about the participant.
Service Requests	Lists the service requests associated with the participant.
Activities	Lists the activities associated with the participant.
Notes	Displays the notes associated with the participant.
Attachments	Displays the attachments associated with the participant.

Explore: Service Requests List

New	SLA	Ultimate SR #	SR #	Status	Abstract	Owner	EID	Account Name	Billing Name	First Name
*		2-86378037	2-86378037	Open	Periodic Service call	-ASO-HR-BENEFITS	FERBER	Ferber Bros. Furnitu	Ferber Bros. Furnitu	
*		2-86377967	2-86377967	Open	Tokens for PureSafety Training	-ASO-HR-BENEFITS	KRATZKY	Kratzky Health Food	Kratzky Health Food	Charles
		2-86377477	2-86377477	Open	benefit plan and report	MATRAIN18	KRATZKY	Kratzky Health Food	Kratzky Health Food	George W
		2-86377477	2-86377549	Open	benefit plan and report	MATRAIN18	KRATZKY	Kratzky Health Food	Kratzky Health Food	George W
		2-86378133	2-86378133	Open	ADP reporting	MATRAIN17	FOXMAC	Fox, MacDonald & A	Fox, MacDonald & A	Charles
		2-86378149	2-86378149	Open	ADP reporting	MATRAIN17	FOXMAC	Fox, MacDonald & A	Fox, MacDonald & A	Charles

Elements and Descriptions

Element	Description
New	Identifies a new service request
SR#	System generated number uniquely identifying the record
Status	Displays the service request status including open and closed requests
Abstract	Short description of the request; maximum 100 characters and spaces
EID	Account record to which the service request is assigned
Last Name	Contact's last name
Ultimate SR #	Identifies the ultimate parent, grandparent, etc for the service request.
SRCause	Indicates the position of the caller, including administrator, manager, or participant. This field can also be used to track internal requests or tasks.
Support Hold	Identifies that an account is on a financial support hold
Parent SR #	Identifies the Parent Service Request Number on child service request records. The Parent SR # field is editable by a user on any SR pick applet.
Parent SR Owner	Identifies the Parent Service Request Owner on child service request records
Owner	CRM User ID the request is assigned to; defaults to the user who creates the service request
Super Type	Identifies the business group of the Siebel CRM user and determines which types and subtypes display when completing service requests
Type/Subtype	Type of service requested (payroll, HR, benefits, recruiting, etc.)
Due Date	The date resolution of the request is needed
Date Opened/Closed	The date the request was opened/closed
Site	Name of account location, company code or other business-specific identifier
Hot Client	Identifies a client who may require special attention
Severity	Severity of the issue (impact to the business)
Source	Method by which the request was received (Call – Incoming, Email, etc.)

■ Explore: Service Request Form Tabs

The screenshot displays the 'Client - Service Request' form. At the top, a navigation bar includes tabs: More Info, Activities, Service Request Alerts, Related SRs, Solutions, SR Profile, Activity Plans, FileNET Documents, Child Service Requests, CASD Child SR, Notes, Wizard Q&A, External References, and Practitioner Portal. Below this, the form title 'Client - Service Request' is shown with a '1 of 6' indicator. The form is divided into several sections:

- SR Information:** SR # 2-86798137, Owner MATRAIN20, Super Type General, Type Payroll Services, Sub Type New Hire Reporting, Source Call - Incoming, Severity 5 - Service Level Std, Priority 3-Medium, Status/Sub Open, Asset ADP Pay eXpert, Parent SR#.
- Account Information:** Account ID FERBER, Account Name Ferber Bros. Furnitur, Processing Region, Site FERBER, Sub Accounts, BCC Affected, Unsupported, Support Hold, Version, Cause Participant, Reason.
- Risk and Dates:** Risk (green bar), Date Assigned 9/28/20XX 12:40, Date Opened 9/28/20XX 12:48, Date Closed.
- Participant and Wizard:** Participant SR, Wizard Applied, 1st Contact Resolution, Activities Done, Employee #, Resolution, Sub Resolution.
- Due Date and Web Visibility:** Due Date 9/28/2011 03:43:34, Web Visibility Public.
- Description:** Question on ADP Reporting.
- Contact and Requestor:** Fields for First Name, Last Name, Work Phone, Time Zone, SR Time Zone (Central Time (US & ...), Requestor Name, Requestor Email, Requestor Phone, Cust Ref Number.

■ Elements and Descriptions

Tab	Description
More Info	Displays additional information about the service request
Activities	Details about each discrete action performed to resolve the service request
Service Request Alerts	Provides visibility of alerts for contacts and the account.
Attachments	URLs, emails, and documents attached by a user that provide details about the selected service request
Related SRs	Other service requests that are related to the selected service request
Audit Trail	Changes made to specific fields in the selected service request
Child Service Requests	Allow users the ability to escalate an issue to another team or department while still keeping visibility to the Parent Service Request and issue. The user must be on the parent record before creating the child record. The Parent SR number will default to the Child SR Record.
Notes	Stores notes for a service request and a child service request
Activity Plans	Allows users the ability to apply an activity plan to generate a list of activities for the service request. This can make the data entry process more efficient for common service requests.
Company Code Affected	The Company Code view of the Accounts screen allows you to identify multiple billings or company codes associated with an account record. You can associate transactional records (service requests, change requests, projects and activities) with different billing or company codes for the account and run detail reports against transactional records.

Explore: Activities List

New	Ultimate SR Number	SR Number	Activity #	Activity Type	Account Name	Status	Owner	Severity
*	2-86378037	2-86378037	2-1FFDUK	Add / Create / SetUp	Ferber Bros. Furnitu	Done	MATRAIN10	5 - Service Level Std
	2-86378037	2-86378037	2-1FFDUO	Approval / Authorization	Ferber Bros. Furnitu	Done	MATRAIN17	5 - Service Level Std
	2-86378037	2-86378037	2-1FFDV2	Call - Outbound	Ferber Bros. Furnitu	Done	MATRAIN17	5 - Service Level Std

Elements and Descriptions

Element	Description
SR Number	System generated number identifying the record
New	Identifies a new activity
Activity#	System generated number uniquely identifying the record
Description	Short description of the action; maximum 100 characters and spaces
Activity Type	Type of activity (Assignment, Documentation, Install, Quote, etc.)
Status	Displays the activity status including open and closed
Ultimate SR	Identifies the ultimate parent, grandparent, etc for the service request.
Account Name	Identifies the entity or parent account.
Owner	CRM User ID the activity is assigned to; defaults to the user who creates the Activity
Created	The date the activity was created
Due Date	The date the action needs to be complete
Project	Identifies when the activity is attached to a project
EID	Account record to which the activity is assigned
Overdue Indicator	Identifies if an activity has passed its due date
Site	Name of account location, company code, or other business-specific identifier
Severity	Severity of the issue (impact to the business); defaults to Severity 5 upon creation of the activity



Explore: Activity Form Tabs

The screenshot shows a CRM interface with a top menu bar (File, Edit, View, Navigate, Query, Tools, Help) and a sub-menu bar (Home, Accounts, Participants, Contacts, Invoices, Roles, Service Requests, Ultimate Service Requests, Projects, Tasks, Ultimate Accounts, Activities, Assets, Quality). The 'Activities' tab is selected. Below the menu bar, there's a 'Queries' dropdown set to 'Activities Not Done'. The main form area is titled 'Activity' and contains several sections: 'Activity' (with fields for Activity #, Activity Type, Sub Type, Status, Description, Comments), 'SR' (with fields for SR Number, SR Due Date, CR #, Project #, Task #, Agreement #, SR Severity, SR Type, SR Sub Type, SR Abstract, SR Description), 'Contact' (with fields for Asset, Contact First Name, Contact Last Name, Contact Phone Number, Due Date, Time Zone, Department Code, Department Sub Code, Rework, Reference Number, Activity Web Viability, Time Records), and 'Account' (with fields for Hot Client, ED, Site, Account Name, Account ID, Processing Region, BCC Affected, Paygroup Affected, Billable Flag, Billable Amount, Billing Code, Fee Reduction Reason). The form is populated with data for a specific activity, including '2-101TDZ' as the Activity #, 'Package/Delivery/Fulfillment' as the Activity Type, 'Open' as the Status, 'Admin Welcome Kits' as the Description, '2-87424761' as the SR Number, '5/14/2012 11:41:44' as the SR Due Date, '5 - Service Level Std' as the SR Severity, 'Company Administrator' as the SR Type, 'Material/Supplies' as the SR Sub Type, 'New client admin' as the SR Abstract, 'New client admin' as the SR Description, 'Bill' as the Contact First Name, 'Clinton' as the Contact Last Name, '5/14/2012 11:41 AM' as the Due Date, 'Pacific Time (US & Can)' as the Time Zone, 'Department Code' as the Department Code, 'Department Sub Code' as the Department Sub Code, 'Rework' as the Rework, 'Reference Number' as the Reference Number, 'Activity Web Viability' as the Activity Web Viability, 'Time Records' as the Time Records, 'Hot Client' as the Hot Client, 'ED' as the ED, 'KRATZKY' as the Site, 'Kratzky Health Food' as the Account Name, 'Account ID' as the Account ID, 'Processing Region' as the Processing Region, 'BCC Affected' as the BCC Affected, 'Paygroup Affected' as the Paygroup Affected, 'Billable Flag' as the Billable Flag, 'Billable Amount' as the Billable Amount, 'Billing Code' as the Billing Code, and 'Fee Reduction Reason' as the Fee Reduction Reason.

■ Tabs and Descriptions

Tab	Description
More Info	Details about the selected activity, including the date the activity was created and by whom, the date the activity was last updated and by whom
Attachments	URLs, emails, and documents that provide details about the selected activity
About Record	Details about the selected activity, including activity type, status, severity level, description, comments, and due date