

# Oracle® Service User's Guide

**Release 11**

March 1998



**ORACLE®**  
Enabling the Information Age™

Oracle® Service User's Guide  
Release 11

The part number for this book is A57735-01.

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# Preface

Welcome to the *Oracle<sup>®</sup> Service User's Guide, Release 11*.

This user's guide includes the information you need to work with Oracle Service effectively. It contains detailed information about the following:

- Overview and reference information
- Specific tasks you can accomplish using Oracle Service
- Oracle Service setup
- Oracle Service functions and features
- Oracle Service windows
- Oracle Service reports and processes

This preface explains how this user's guide is organized and introduces other sources of information that can help you.

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## About This User's Guide

This guide contains overviews as well as task and reference information about Oracle Service. This guide includes the following chapters:

- Chapter 1 provides you with an overview of Oracle Service, discussing the interrelationships amongst the installed base, support services, service requests, and depot repair.
- Chapter 2 describes how to set up Oracle Service.  
**Note:** Implementation information and procedures are contained in this chapter.
- Chapter 3 provides you with an overview of the installed base and describes how the installed base is populated, maintained, and searched.
- Chapter 4 provides you with an overview of support services, including service programs and warranties.
- Chapter 5 describes how to track customer service calls using service requests.
- Chapter 6 explains how you can manage field engineer assignments in conjunction with Oracle Service's service requests.
- Chapter 7 describes how to manage the product repair and replacement process in depot repair.
- Chapter 8 describes Oracle Service's billing features.
- Chapter 9 gives an overview of the workflows that Oracle Service provides.
- Chapter 10 briefly describes each Oracle Service report.

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## Audience for This Guide

This guide assumes you have a working knowledge of your business area's processes and tools. It also assumes you are familiar with Oracle Service. If you have never used Oracle Service, we suggest you attend one or more of the Oracle Service training classes available through World Wide Education. For more information about Oracle Service and Oracle training, see: Other Information Sources.

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## Do Not Use Database Tools to Modify Oracle Applications Data

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL\*Plus and other database tools do not keep a record of changes.

***Consequently, we STRONGLY RECOMMEND that you never use SQL\*Plus or any other tool to modify Oracle Applications data unless otherwise instructed.***

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## Other Information Sources

Here are some other ways you can increase your knowledge and understanding of Oracle Service.

### Online Documentation

All Oracle Applications documentation is available online on CD-ROM, except for technical reference manuals. There are two online

formats, HyperText Markup Language (HTML) and Adobe Acrobat (PDF).

All user's guides are available in HTML, Acrobat, and paper. Technical reference manuals are available in paper only. Other documentation is available in Acrobat and paper.

The *content* of the documentation does not differ from format to format. There may be slight differences due to publication standards, but such differences do not affect content. For example, page numbers and screen shots are not included in HTML.

The HTML documentation is available from all Oracle Applications windows. Each window is programmed to start your web browser and open a specific, context-sensitive section. Once any section of the HTML documentation is open, you can navigate freely throughout all Oracle Applications documentation. The HTML documentation also ships with Oracle Information Navigator (if your national language supports this tool), which enables you to search for words and phrases throughout the documentation set.

## **Related User's Guides**

Oracle Service shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other user's guides when you set up and use Oracle Service.

If you do not have the hardcopy versions of these manuals, you can read them online using the Applications Library icon or Help menu command.

### **Oracle Applications User's Guide**

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This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle Service (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

### **Oracle Applications Demonstration User's Guide**

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This guide documents the functional storyline and product flows for Global Computers, a fictional manufacturer of personal computers products and services. As well as including product overviews, the

book contains detailed discussions and examples across each of the major product flows. Tables, illustrations, and charts summarize key flows and data elements.

### **Oracle Inventory User's Guide**

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This guide describes how to define items and item information, perform receiving and inventory transactions, maintain cost control, plan items, perform cycle counting and physical inventories, and set up Oracle Inventory.

### **Oracle Order Entry/Shipping User's Guide**

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This guide describes how to enter sales orders and returns, copy existing sales orders, schedule orders, release orders, plan departures and deliveries, confirm shipments, create price lists and discounts for orders, and create reports.

### **Oracle Quality User's Guide**

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This guide describes how Oracle Quality can be used to meet your quality data collection and analysis needs. This guide also explains how Oracle Quality interfaces with other Oracle Manufacturing applications to provide a closed loop quality control system.

### **Oracle Self Service Web Applications User's Guide**

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This guide describes how Oracle Self Service Web Applications enable companies to provide a self-service and secure web interface for its employees, customers and suppliers. Employees can change their personal status, submit expense reports or request supplies; customers can check on their orders; and suppliers can share production schedules with their trading partners. This guide is available in HTML only.

### **Oracle HRMS User's Guide**

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This manual explains how to enter your employees. It also explains how to set up organizations and site locations. Even if you do not install Oracle HRMS, you can set up your employees, site locations, and organization using Oracle HRMS forms.

## **Oracle Workflow Guide**

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This manual explains how to define new workflow business processes as well as customize existing Oracle Applications–embedded workflow processes. You also use this guide to complete the setup steps necessary for any Oracle Applications product that includes workflow–enabled processes.

## **Reference Manuals**

### **Oracle Automotive Implementation Manual**

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This manual describes the setup and implementation of the Oracle Applications used for the Oracle Automotive solution.

### **Oracle Manufacturing, Distribution, Sales and Service Open Interfaces Manual**

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This manual contains up–to–date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes open interfaces found in Oracle Manufacturing.

### **Oracle Applications Message Reference Manual**

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This manual describes all Oracle Applications messages. This manual is available in HTML format on the documentation CD–ROM for Release 11.

### **Oracle Project Manufacturing Implementation Manual**

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This manual describes the setup steps and implementation for Oracle Project Manufacturing.

### **Oracle Self–Service Web Applications Implementation Manual**

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This manual describes the setup steps for Oracle Self–Service Web Applications and the Web Applications dictionary.

# Installation and System Administration

## **Oracle Alert User's Guide**

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This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

## **Multiple Reporting Currencies in Oracle Applications**

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If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing Oracle Service. This manual details additional steps and setup considerations for implementing Oracle Service with this feature.

## **Multiple Organizations in Oracle Applications**

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If you use the Oracle Applications Multiple Organization Support feature to use multiple sets of books for one Oracle Service installation, this guide describes all you need to know about setting up and using Oracle Service with this feature.

## **Oracle Applications Implementation Wizard User's Guide**

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If you are implementing more than one Oracle product, you can use the Oracle Applications Implementation Wizard to coordinate your setup activities. This guide describes how to use the wizard.

## **Oracle Applications Developer's Guide**

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This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards*. It also provides information to help you build your custom Developer/2000 forms so that they integrate with Oracle Applications.

## **Oracle Applications Flexfields Guide**

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This guide provides flexfields planning, setup and reference information for the Oracle Service implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

## **Oracle Applications Installation Manual for Windows Clients**

This guide provides information you need to successfully install Oracle Financials, Oracle Public Sector Financials, Oracle Manufacturing, or Oracle Human Resources in your specific hardware and operating system software environment.

## **Oracle Applications Product Update Notes**

If you are upgrading your Oracle Applications, refer to the product update notes appropriate to your update and product(s) to see summaries of new features as well as changes to database objects, profile options and seed data added for each new release.

## **Oracle Applications Upgrade Preparation Manual**

This guide explains how to prepare your Oracle Applications products for an upgrade. It also contains information on completing the upgrade procedure for each product. Refer to this manual and the *Oracle Applications Installation Manual* when you plan to upgrade your products.

## **Oracle Applications System Administrator's Guide**

This manual provides planning and reference information for the Oracle Service System Administrator.

## **Other Sources**

### **Training**

We offer a complete set of formal training courses to help you and your staff master Oracle Service and reach full productivity quickly. We organize these courses into functional learning paths, so you take only those courses appropriate to your job or area of responsibility.

You have a choice of educational environments. You can attend courses offered by Oracle Education Services at any one of our many Education Centers, or you can arrange for our trainers to teach at your facility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization structure, terminology, and data as examples in a customized training session delivered at your own facility.

## Support

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From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Service working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8 server, and your hardware and software environment.

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## About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 45 software modules for financial management, supply chain management, manufacturing, project systems, human resources and sales and service management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 140 countries around the world.

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## Thank You

Thank you for using Oracle Service and this user's guide.

We value your comments and feedback. At the end of this guide is a Reader's Comment Form you can use to explain what you like or

dislike about Oracle Service or this user's guide. Mail your comments to the following address or call us directly at (650) 506-7000.

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# Overview of Oracle Service

**T**his chapter provides an overview of Oracle Service and its components: Installed Base, Support Services, Service Requests, Field Service, Depot Repair, and Billing. It also outlines Oracle Workflow and Web functionality.

Oracle Service integrates with Oracle Order Entry/Shipping, Oracle Work in Process, Oracle Inventory, Oracle Bills of Material, Oracle Receivables, Oracle Workflow, and Oracle ConText Server to provide the following Service features:

- Installed Base Management: page 1 – 3
- Support Services: page 1 – 4
- Service Requests: page 1 – 4
- Field Service: page 1 – 5
- Depot Repair: page 1 – 5
- Web Integration: page 1 – 6
- Supported Business Processes: page 1 – 8

# Introduction

Customer service is a critical competitive differentiator in many industries today. Accelerated competition is a given, forcing companies to respond to the pressure of reducing costs while improving quality. High quality is required not just in manufacturing plants, but throughout the entire supply chain, with a growing emphasis on customer service and 'delighting the customer.'

However, many customer service organizations today are not well integrated with the rest of the business. Customer information often exists in poorly maintained, isolated 'pocket databases', which may not be shared across the enterprise. Thus, customer information pertaining to presales activities, quotes, orders, warranties, installations, service requests, and repair details is often unavailable to the people who provide customer service.

Oracle Applications extend the traditional supply chain by providing customer support solutions before and after your products are sold. Product modules that manage distribution, manufacturing, financials, and human resources work together as an integrated solution to provide you with a consolidated view of your customer relationships.



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## Overview of Oracle Service

Oracle Service offers a critical extension to your supply chain by providing support for products after you have sold them. It offers you complete access to customer and product profiles, including current and past service history. Oracle Service helps you manage your customer relationships.

Oracle Service is an integrated customer service solution that provides installed base management, support service tracking, service requests, field service, depot repair, service billing, and Web integration. You can fully integrate your service organization with the rest of your business by leveraging Oracle Service with Oracle Order Entry/Shipping, Oracle Receivables, Oracle Inventory, Oracle Quality, and Oracle Work in Process. Oracle Service shares key data with these Oracle Applications modules, such as customer and product masters. This ensures organization-wide data consistency and manageability.

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## Installed Base Management

The Oracle Service Installed Base module provides you with information about products that have been installed at each customer site, as well as the support services for these products. By capturing information from Oracle Order Entry/Shipping, the installed base provides information about products sold to customers or distributors. Information available in the installed base includes customer contacts, shipping details, installation dates and addresses, warranties, and service programs applied to the installed products.

Installed base functionality helps you track the models and options installed at your customer sites, including serial numbers and product revision numbers. You can also group these product configurations into flexibly defined systems for service management, distribution of responsibility, or reporting purposes. When you review the products that are installed at a customer address, you can see whether these products are covered by purchased service programs or included warranties.

If you sell products to resellers, who in turn sell them to end customers, you can transfer a customer product in the installed base from the reseller to the end customer to keep your installed base information up-to-date. Oracle Service's installed base also helps you track product upgrades, replacements, and loaners.

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## Support Services

You can create warranties and service programs to represent the various support services that you provide to your customers. A warranty that you define for a specific product is applied automatically to that product whenever you sell that product. In contrast, a service program is a support service that you sell to your customer at a particular price; examples include an extended warranty or an agreement to provide telephone support. For each service program or warranty that you create, you can define coverage schedules detailing the hours during the day and days during the week when customers may request that service for their products. For each support service, you can also define the labor, material, and expenses covered by that service. You can control the availability of your services by product, by customer, or a combination of both.

Oracle Service's flexible service renewal procedures help you provide your customers with uninterrupted support. Oracle Service generates sales orders for service renewals and submits these orders to Oracle Receivables for billing. Service transaction records are available for you to view the history of a product's service, including the initial service order and all renewals and terminations of the service.

---

## Service Requests

When your customers call with questions or problems, you can track each call using Oracle Service's Service Request module. You can categorize service requests into various user-defined types, such as standard customer calls, hot calls, product installation requests, product inquiries, customer complaints, field failures, field maintenance visits, and returned products. For each service request that you create, you can enter details such as problem and resolution descriptions, actions requested or taken, service personnel assigned to resolve the service request, the urgency from the customer's perspective, severities, dates, timestamps, actual resolution times, problem codes, resolution codes, and so on.

Oracle Service is well-integrated with computer telephony software. Based on call characteristics, you can route a call to an appropriate agent and make customer information available to the agent to facilitate the call's resolution. Oracle Service also creates a knowledge base of previously reported problems and their resolutions. Whenever a new service request is logged, service personnel can search this knowledge base for matching problems and resolutions.

Once service requests are logged, you can route them through your enterprise a workflow-based resolution process. Using Oracle Workflow, service request resolution procedures can be extended to meet your needs. Using these procedures, you can automatically service personnel and transfer or escalate service requests. You can also analyze each service request's routing to identify and eliminate bottlenecks in the resolution process.

Using Oracle Quality, you can set up collection plans to capture service request data. You can then perform statistical analyses on this collected data.

---

## Field Service

Oracle Service enables you to create field service requests; select and dispatch field service personnel; and track the material, labor, and expenses of any field service. A rule-based engineer selection process is utilized to identify the appropriate service personnel. These service personnel can then be notified about the field service visit and customer.

Oracle Service facilitates effective communication amongst field service personnel, dispatchers, and customers through a powerful messaging feature. Based on service request parameters, you can also launch a workflow to resolve problems.

You can facilitate both inbound and outbound communications with powerful messaging capabilities. Using Oracle Service's billing capability, customers can be invoiced on itemized or consolidated material, labor, and expenses incurred during the field service visit.

---

## Depot Repair

Oracle Service efficiently manages your repair depot through tight integration with return material authorizations (RMAs) in Oracle Service and Order Entry/Shipping, discrete job repair functionality and repair cost tracking in Oracle Work in Process, and invoicing in Oracle Receivables.

You can verify service program or warranty coverage on a product as you process a customer return for repair or replacement. For each repair item, you can perform a diagnosis and create an estimate, or select a previous estimate for an item. If you choose to apply a

customer's service coverage to the repair, Oracle Service modifies the charge based on the service coverage to ensure that the customer is correctly billed according to the labor, material, and expense coverage. Oracle Service helps you create repair jobs in Oracle Work in Process for approved repairs. Alternatively, you can send a replacement item to your customer by creating a replacement sales order.

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## Web Integration

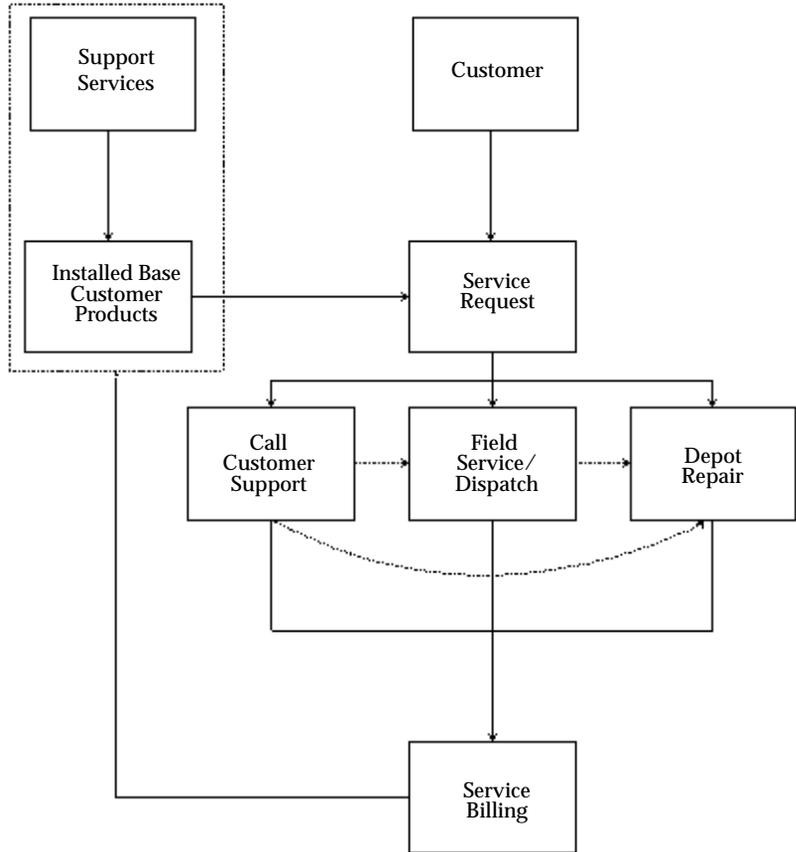
Oracle Service is well supported by Oracle Self-Service Web Applications. Using Oracle Web Customers, customers can log service requests, view the status of previously logged service requests, and update existing requests.

A service request logged over the Web can launch a workflow to route the request through various functional organizations. You can also use Oracle Web Customers to search the Service knowledge base for known resolutions, view depot repair job statuses, and drill down in the installed base to view customer product details. You can also drill down to sales orders, invoices, and credits associated with service records.

## See Also

Service Requests, *Oracle Web Customers*

Expert Mode Search with Oracle ConText, *Oracle Web Customers*



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## Supported Business Processes

You can create a sales order to sell a serviceable product to a customer. In addition to the serviceable product, the order can also contain a service program for that product, such as telephone hotline support for product inquiries, complaints, or problems. You can also include a warranty with the product to cover expenses, labor and material.

As you ship the product to your customer, you can record the product serial number, lot number, or revision. If the product is a pick-to-order configuration, you can also record the serial numbers for the various options that your customer selected.

The serviceable product, service program, warranty, and other information, such as the customer name, installation addresses, contacts, and ship date, form the installed base customer service database. You can use the installed base to view what products have been sold and to whom, and which products are covered by a service program or warranty. The installed base also helps you determine when these support services are due to expire.

Perhaps you sell your products to distributors who, in turn, sell them to the end customer. When you know who the end customer is, you can optionally transfer the serviceable product and its service programs and warranty from the distributor to the end customer.

If you need to plan the product installation at the customer site, you can enter a service request to assign the installation task to a field service engineer. After the installation, you can enter additional details, or service request actions, which serve as the service history for work performed at the customer site. Then you can also activate the product warranty.

For example, if the warranty expires after 90 days, your customer might want to purchase a service program for extended coverage. You can then create another sales order for this service program and bill the customer accordingly.

If your customers purchased a service program for telephone support, they are authorized to call the hotline during certain business hours. The installed base helps you verify each supported customer when the customer calls. You can define the different reasons for calls as service request types, with various degrees of urgency and severity. To track these calls, you can enter a service request for each call and assign each service request to your support personnel who are responsible for resolving and closing the service request. Each type of service request can have a resolution process that you define, with various actions, owners, and so forth. Customer service representatives can search the

knowledge base to determine what approaches have resolved this problem in the past. Once all actions against a service request have been completed, the service request can be closed.

Oracle Service supports depot repair functionality for customer returns, including repair-and-return and replacement. If the serviceable product becomes defective, your customer may call your hotline to report this problem. You can enter a service request to track this call, and enter a return material authorization (RMA) to track the defective product when it is returned to your service center. After you receive the defective product from your customer, you can replace or repair it. If you decide to repair it, you can diagnose the problem, enter an estimate for the repair, and optionally seek customer approval before beginning the repair. The estimate, which you can enter before, during, or after the repair, can include the labor and material for your repair. If the product is covered by a service program or warranty, you can apply the coverage to the estimate to reduce or eliminate the repair charges.

If the service program for the telephone support is due to expire, perhaps after several months or a year, Oracle Service reports the expiring support services, enables you to renew the service program, and creates a new sales order for the renewal.



# Setting Up

**T**his chapter gives you an overview of setting up Oracle Service, including these topics:

- Overview of Setting Up: page 2 – 3
- Time Units of Measure: page 2 – 7
- Service Request and Action Workflow Setup: page 2 – 8
- Oracle Service Profile Options: page 2 – 9
- Setting Up Service Parameters: page 2 – 16
- Setting Up Customer Product Statuses: page 2 – 18
- Setting Up Customer Product Types: page 2 – 20
- Setting Up System Types: page 2 – 21
- Setting Up Order Transaction Types: page 2 – 22
- Setting Up Transaction Groups: page 2 – 24
- Setting Up Service Coverages: page 2 – 27
- Setting Up Service Availability: page 2 – 28
- Setting Up Renewal Reasons: page 2 – 30
- Setting Up Termination Reasons: page 2 – 31
- Setting Up Service Request Statuses: page 2 – 33
- Setting Up Service Request Severities: page 2 – 34

- Setting Up Service Request Urgencies: page 2 – 35
- Setting Up Service Request Types: page 2 – 36
- Setting Up Problem Codes: page 2 – 40
- Setting Up Resolution Codes: page 2 – 41
- Setting Up Message Action Codes: page 2 – 42
- Setting Up Call Types: page 2 – 43
- Setting Up Call Follow-up Types: page 2 – 44
- Setting Up Field Service Personnel: page 2 – 45
- Setting Up Support Levels: page 2 – 46
- Setting Up Service Groups: page 2 – 48
- Setting Up Dispatch Rules: page 2 – 50
- Setting Up Diagnosis Codes: page 2 – 52
- Setting Up Reject Repair Reasons: page 2 – 53
- Concurrent Processes: page 2 – 55

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# Overview of Setting Up

## **Oracle Applications Implementation Wizard**

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If you are implementing more than one Oracle Applications product, you may want to use the Oracle Applications Implementation Wizard to coordinate your setup activities. The Implementation Wizard guides you through the setup steps for the applications you have installed, suggesting a logical sequence that satisfies cross-product implementation dependencies and reduces redundant setup steps. The Wizard also identifies steps that can be completed independently—by several teams working in parallel—to help you manage your implementation process most efficiently.

You can use the Implementation Wizard as a resource center to see a graphical overview of setup steps, read online help for a setup activity, and open the appropriate setup window. You can also document your implementation, for further reference and review, by using the Wizard to record comments for each step.

## **Set Up Oracle Applications Technology**

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The setup steps in this chapter tell you how to implement the parts of Oracle Applications specific to Oracle Service.

The Implementation Wizard guides you through the entire Oracle Applications setup, including system administration. However, if you do not use the Wizard, you need to complete several other setup steps, including:

- performing system-wide setup tasks such as configuring concurrent managers and printers
- managing data security, which includes setting up responsibilities to allow access to a specific set of business data and complete a specific set of transactions, and assigning individual users to one or more of these responsibilities

Also, if your product uses Oracle Workflow to, for example, manage the approval of business documents or to derive Accounting Flexfield values via the Account Generator, you need to set up Oracle Workflow.

### **See Also**

*Oracle Applications Implementation Wizard User's Guide*

*Oracle Applications System Administrator's Guide*

► **To set up Oracle Service for your organization:**



**Attention:** You must install Oracle Order Entry/Shipping and Oracle Inventory if you use all of Oracle Service's modules. You need not do this if you only use the service requests module.

1. Install Oracle Service.
2. Define your time units of measure in Oracle Inventory.  
See: Time Units of Measure: page 2 – 7.
3. Set up and customize your workflows.  
See: Service Request and Action Workflow Setup: page 2 – 8
4. Set your profile options.

Profile options specify how Oracle Service controls access to and processes data. Profile options can be set at the following levels: site, application, responsibility, and user. See: Oracle Service Profile Options: page 2 – 9.

**Note:** The following profile options are required for Oracle Order Entry/Shipping forms to function: *OE:Item Validation Organization*, *OE:Default CP\_Selection Attribute*, *Service:Time Unit of Measure*, *Service:Day Unit of Measure*, *Service:Month Unit of Measure*.

5. Set your Oracle Service system parameters.  
See: Setting Up Service Parameters: page 2 – 16.
6. Define customer product statuses.  
Customer product status codes represent the current state and transactability of the product. See: Setting Up Customer Product Statuses: page 2 – 18.
7. Define customer product types.  
Customer product QuickCodes explain the nature of the customer product. See: Setting Up Customer Product Types: page 2 – 20.
8. Define system types. System type QuickCodes categorize your user-defined systems, which are logical groupings of customer products.  
See: Setting Up System Types: page 2 – 21.
9. Define order transaction types.

Order transaction types specify whether order lines result in new customer products or enhanced (upgraded, replaced, or revised) customer products. See: *Setting Up Order Transaction Types*: page 2 – 22.

10. Define transaction groups.

Transaction groups control which transaction types you can specify. See: *Setting Up Transaction Groups*: page 2 – 24.

11. Define service coverage.

Service coverage reflects the service request reporting time stated in days and hours, and the repair expenses supported by the service program. See: *Setting Up Service Coverages*: page 2 – 27.

12. Define serviceable products using Oracle Inventory.

See: *Defining Serviceable Products*: page 3 – 10.

13. Define service programs and base warranties using Oracle Inventory.

See: *Defining Service Programs*: page 4 – 11 and *Defining Warranties*: page 4 – 14.

Service programs and warranties must be set up as items with a time unit of measure. See: *Time Units of Measure*: page 2 – 7.

14. Set up field service personnel.

See: *Setting Up Field Service Personnel*: page 2 – 45.

15. Define your field support levels and service groups.

See: *Setting Up Support Levels*: page 2 – 46 and *Setting Up Service Groups*: page 2 – 48.

16. Define dispatch rules to use when assigning support personnel to service requests.

See: *Defining Dispatch Rules*: page 2 – 50.

17. Define service availability to determine availability of specific service programs, if needed.

Service availability allows or restricts access to specific service programs for selected customers and products. See: *Setting Up Service Availability*: page 2 – 28.

18. Define renewal reasons.

Renewal reason QuickCodes explain the reason for service renewal. See: *Setting Up Renewal Reasons*: page 2 – 30.

19. Define Termination Reasons.

Termination reason QuickCodes explain the reason for service termination. See: Setting Up Termination Reasons: page 2 – 31.

20. Define request and action statuses.

Request and action statuses represent the various states in which a request or action can be. See: Setting Up Service Request Statuses: page 2 – 33.

21. Define request severities and urgencies.

Severities and urgencies let you track how critical a request or action is. See: Setting Up Service Request Severities: page 2 – 34 and Setting Up Service Request Urgencies: page 2 – 35.

22. Define service request and action types.

Service request and action types categorize requests and actions, and allow you to process requests and actions in different ways. See: Setting Up Service Request Types: page 2 – 36.

23. Define problem and resolution codes for service request tracking.

See: Setting Up Problem Codes: page 2 – 40 and Setting Up Resolution Codes: page 2 – 41.

24. Define message action requests.

These codes describe the types of message actions you can request when you send a message from the installed base, service requests, or depot repair modules. See: Setting Up Message Action Codes: page 2 – 42.

25. Define call types and call follow-up types.

These help describe the nature of service request customer interactions. See: Setting Up Call Types: page 2 – 43 and Setting Up Call Follow-up Types: page 2 – 44.

26. Define diagnosis codes and reject repair reasons for tracking depot repair.

See: Setting Up Diagnosis Codes: page 2 – 52 and Setting Up Reject Repair Reasons: page 2 – 53.

27. Schedule concurrent processes.

See: Concurrent Processes: page 2 – 55.

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## Time Units of Measure

Support services must be defined in Oracle Inventory with a primary unit of measure from the 'time' class. Service programs must then be added to a price list in Oracle Order Entry/Shipping with the primary unit of measure. The same service program can be added to a price list a second or subsequent time, using another unit of measure from the 'time' class, because the conversions are made available to Order Entry.

To set up 'time' units of measure, use the Unit of Measure window in Oracle Inventory. Use the preferred class name 'time'. For a base unit, specify 'second'. Next, enter the subsequent corresponding units of measure used in Oracle Service: *second, minute, hour, day, week, month, and year*.

In the Unit of Measure Conversions window, use the 'Standard' conversion type. Using the suggested units of measure, the conversion from seconds to minutes are entered as:

### **Unit of Measure (Minute) Class (time) Conversion (60) Base Unit (Second)**

The conversion is: Minute = 60 x Second. The suggested conversions are:

<i>Unit of Measure</i>	<i>Class</i>	<i>Conversion</i>	<i>Base Unit</i>
Minute	time	60	Second
Hour	time	3600	Second
Day	time	86400	Second
Week	time	604800	Second
Month	time	2592000	Second
Year	time	31536000	Second

### See Also

Overview of Units of Measure, *Oracle Inventory User's Guide*

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## Service Request and Action Workflow Setup

Oracle Service workflows are built based on the views defined by the script *wfdirhrv.sql*, which is based on the Oracle HRMS data model. It is important that this view be used during Oracle Workflow installation.

You can specify the system-wide Workflow Administrator for Oracle Service by setting the profile *Service: Workflow Administrator*. Whenever errors occur in an Oracle Service workflow process, a notification will be sent to this administrator. The profile option is based on all the workflow roles that exist in the system. Therefore, you should create a workflow role for the Oracle Service workflow administrator prior to setting this profile option. You **must** set this profile option before you launch new workflow processes.

Each workflow must be associated with a service request or action type before it can be executed. You specify the workflow name that corresponds to a service request or action type when you define request and action types. You cannot associate a service request type with the Service Request Action Workflow or an action type with the Service Request Workflow.

You must set up a background engine to handle deferred and timed-out activities. Arrange to submit the *Workflow Background Process* concurrent program as a request to check for these halted activities. You should schedule this program to run regularly to ensure proper execution of Oracle Service's workflow processes.

### See Also

Oracle Service Profile Options: page 2 – 9

Setting Up Service Request Statuses: page 2 – 33

Overview of Service Request and Action Workflows: page 9 – 2

Setting Up Background Workflow Engines, *Oracle Workflow Guide*

# Oracle Service Profile Options

During implementation, you set a value for each user profile option to specify how Oracle Service controls access to and processes data.

The profile options are set at one or more of the following levels: site, application, responsibility, and user. The system administrator sets and updates profile values using the System Profile Options window.

You can set the following profile options in Oracle Service.

Profile Options	User	System Administration				Requirements	
	User	User	Resp	App	Site	Required?	Default Value
OE:Apply Order Adjustments to Service Lines	X			X	X		
OE:Default CP Selection Attribute		X	X	X		YES	
OE:Item Validation Organization					X	YES	
Service:Allow Service date change	X						
Service:Auto Launch Web Workflow	X			X	X		
Service:Auto Launch Workflow	X			X	X		
Service:Auto-generate System Name			X	X	X		
Service:Cascade System Termination				X	X		
Service:Customer Product Termination Status				X	X	YES	
Service:Day Unit of Measure	X			X	X	YES	
Service:Default Action Owner	X			X	X		
Service:Default Action Severity	X	X		X	X		
Service:Default Action Type	X	X		X	X		
Service:Default Discount for Repair/Replacement Orders					X		
Service:Default Make Public Flag	X			X	X		
Service:Default Order Type for Service Orders	X			X	X	YES	
Service:Default Order Type for Service Renewals	X	X		X	X	YES	
Service:Default Price List for Repairs	X			X	X	YES	
Service:Default Service Request Owner	X			X	X		
Service:Default Service Request Severity	X			X	X		
Service:Default Service Request Type	X			X	X		
Service:Default Service Request Urgency				X	X		
Service:Default Transaction Group for Depot Repair	X			X	X		
Service:Default Web Service Request Owner	X			X	X		
Service:Default Web Service Request Severity	X			X	X		
Service:Default Web Service Request Type	X			X	X		
Service:Default Web Service Request Urgency	X			X	X		
Service:Enable Context Search				X	X		
Service:Field Service Transaction Organization	X			X	X		
Service:Field Service Transaction Subinventory	X			X	X		

Service:Field Service Transaction Type	X			X	X		
Service:Item Flexfield (Product)				X	X	YES	
Service:Item Flexfield (Service)				X	X	YES	
Service:Minimum Repair Status for Submitting Jobs					X	YES	
Service:Minimum Service Duration	X			X	X	YES	
Service:Month Unit of Measure	X	X		X	X	YES	
Service:On-line Processing of Service Orders	X			X	X		
Service:Publish Flag Update Allowed	X			X	X		
Service:RMA Line Status for Non Repair Lines				X	X		
Service:RMA Line Status for Repair Lines				X	X		
Service:Repair Default Expense Item	X			X	X		
Service:Repair Default Labor Item	X			X	X		
Service:Repair Default Material Item	X			X	X		
Service:Set Customer Product to Latest Revision				X	X	YES	
Service:Support Role in Human Resources				X	X	YES	
Service:System Name Update Allowed				X	X	YES	
Service:Time Unit of Measure	X	X		X	X	YES	
Service:Workflow Administrator				X	X		

### **OE:Apply Order Adjustments to Service Lines**

This value determines whether order-level discounts you assign to an order should also apply to service order lines associated with product order lines. If you do not specify a value for this profile, Oracle Order Entry/Shipping does not apply order-level discounts to service order lines.

### **OE:Default CP Selection Attribute**

This value determines the default attribute for finding customer products in the Installation window of the Order Entry/Shipping's Sales Orders form. Valid choices are Order, System, Type, and Agreement.

### **OE:Item Validation Organization**

For each service responsibility that you define, you should select the *OE:Item Validation Organization* to be the same as that assigned to the profile option by corresponding Order Entry/Shipping responsibilities. This will ensure that both Service and Order Entry/Shipping users use the same inventory organization for item validation.

**Service:Allow Service date change**

Allows you to change start and end dates for support services manually.

**Service:Auto Launch Web Workflow**

Determines whether a workflow launches automatically when you save a Web service request.

**Service:Auto Launch Workflow**

Determines whether a workflow launches automatically when you save a service request.

**Service:Auto-generate System Name**

Controls whether new system names are generated when systems are created.

**Service:Cascade System Termination**

Determines whether system terminate dates should be cascaded to related customer products. If you use this feature, when you terminate a system by setting the end date, Oracle Service automatically sets the same end date for the customer products related to the system and updates their status to Terminated.

**Service:Customer Product Termination Status**

Determines the customer product status to apply to related customer products when terminating a system in the Systems window. Used with the profile *Service:Cascade System Termination*.

**Service:Day Unit of Measure**

Identifies the unit of measure representing the day.

**Service:Default Action Owner**

Default value for service request action owner.

**Service:Default Action Severity**

Default value for service request action severity.

**Service:Default Action Type**

Default value for service request action type.

**Service:Default Discount for Repair/Replacement Orders**

Default discount to accommodate price adjustments on repair or replacement orders.

**Service:Default Make Public Flag**

Determines the default value for the Make Public check boxes in the Comments and Calls windows, and in the Problem Description and Problem Resolution alternative regions of the Service Requests window.

**Service:Default Order Type for Service Orders**

Provides the default order type in the Order Service Programs window.

**Service:Default Order Type for Service Renewals**

Default order type in Renew Service Programs window.

**Service:Default Price List for Repairs**

Default Price List for Repair Estimates.

**Service:Default Service Request Owner**

Default value for service request owner.

**Service:Default Service Request Severity**

Default value for service request severity.

**Service:Default Service Request Type**

Default value for service request type.

**Service:Default Service Request Urgency**

Default value for service request urgency.

**Service:Default Transaction Group for Depot Repair**

Defaults a transaction group in the Charges window if your charge's source is a repair line.

**Service:Default Web Service Request Owner**

Default owner for Web service requests.

**Service:Default Web Service Request Severity**

Default severity for Web service requests.

**Service:Default Web Service Request Type**

Default request type for Web service requests.

**Service:Default Web Service Request Urgency**

Default request urgency for Web service requests.

**Service:Enable Context Search**

If you set this value to Yes, you can use the ConText search feature in the Search Knowledge Base window. While this value is set to No, the data that you enter are not indexed for the knowledge base.

**Service:Field Service Transaction Organization**

Specifies the default inventory organization from which materials are transacted.

**Service:Field Service Transaction Subinventory**

Specifies the default subinventory from which materials are transacted. Your choices for this profile are limited by the value you selected for the profile *Service:Field Service Transaction Organization*.

**Service:Field Service Transaction Type**

Provides a default transaction type for all inventory transactions you interface to Oracle Inventory.

**Service:Item Flexfield (Product)**

This value determines the Oracle Inventory key flexfield structure you want to use when displaying customer product numbers. The value is mandatory; without it, the system will be unable to display the product number. It is recommended that you set this profile to MSTK. See: Oracle Inventory Flexfields, *Oracle Inventory User's Guide*.

**Service:Item Flexfield (Service)**

This value determines the Oracle Inventory key flexfield structure you want to use when displaying support services. This value is mandatory; without it, the system will be unable to display the service program. See: Oracle Inventory Flexfields, *Oracle Inventory User's Guide*.

**Service:Minimum Repair Status for Submitting Jobs**

Controls the minimum repair status required to submit a repair job to Oracle Work in Process.

**Service:Minimum Service Duration**

Determines the minimum duration allowed for a service program. For service program cotermination, this profile can be used to determine whether to advance the cotermination date forward one year. For example, say the customer cotermination date is 31-DEC and a service program is sold to that customer on December 15, 1996. If the minimum service duration is 30, the end date of the service program is set automatically to December 31, 1997.

**Service:Month Unit of Measure**

Identifies the unit of measure representing the month.

**Service:On-line Processing of Service Orders**

If this value is set to No, Oracle Service submits OrderImport requests concurrently. This profile applies only to the Order Service and Renew Service windows.

**Service:Publish Flag Update Allowed**

Controls whether you can change the Publish flag's setting in the Service Requests windows.

**Service:RMA Line Status for Non Repair Items**

Determines the default status assigned to non-repair customer products when the Depot Repair Control program runs.

**Service:RMA Line Status for Repair Items**

Determines the default status assigned to return-for-repair customer products when the Depot Repair Control program runs.

**Service:Repair Default Expense Item**

Provides a shippable rollup item to pass optionally to Order Entry/Shipping instead of the expense item you enter for a charge detail.

**Service:Repair Default Labor Item**

Provides a shippable rollup item to pass optionally to Order Entry/Shipping instead of the labor item you enter for a charge detail.

**Service:Repair Default Material Item**

Provides a shippable rollup item to pass optionally to Order Entry/Shipping instead of the material item you enter for a charge detail.

**Service:Set Customer Product to Latest Revision**

Controls whether a customer product's current revision is automatically updated when a revision update is ordered for an existing customer product.

**Service:Support Role in Human Resources**

Allows you to define an employee as service personnel in Oracle Human Resources, based on jobs (roles) that you define.

**Service:System Name Update Allowed**

Determines whether system name updates are allowed.

**Service:Time Unit of Measure Class**

Identifies the UOM class representing time periods.

**Service:Workflow Administrator**

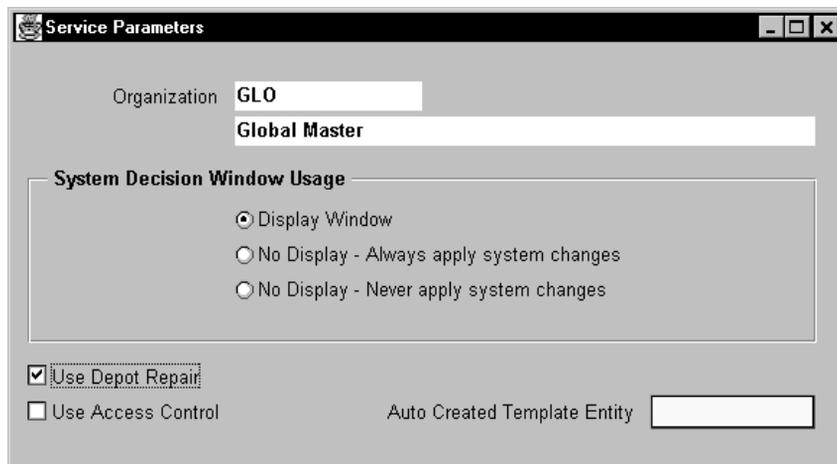
Identifies the Oracle Workflow administrator for your system, based on the valid Workflow roles that have been defined. All error notifications will be sent to this administrator.

## Setting Up Service Parameters

You can use the Service Parameters window to set site-level implementation options (such as whether you are using the Depot Repair module).

► **To setup service parameters:**

1. Navigate to the Service Parameters window.



The screenshot shows the 'Service Parameters' window. The 'Organization' field is set to 'GLO' and 'Global Master'. The 'System Decision Window Usage' section has three radio button options: 'Display Window' (selected), 'No Display - Always apply system changes', and 'No Display - Never apply system changes'. At the bottom, there are two checkboxes: 'Use Depot Repair' (checked) and 'Use Access Control' (unchecked). To the right of these checkboxes is a text field labeled 'Auto Created Template Entity'.

2. The organization will always default to the value of the Oracle Order Entry/Shipping profile option *OE:Item Validation Organization*. This organization is used throughout Oracle Order Entry/Shipping and Oracle Service to determine the items that you sell and service.
3. Set the System Changes Decision Point Window Usage option. This determines whether to copy system changes to the customer products associated with the system. For example, when you change the installation location of a system, you may want the change to automatically cascade to all customer products under that system. Select the following options:
  - **Display** – When you make a change to a system, a pop-up window will ask you whether you want to cascade the change to the customer products.
  - **Never Display, Never Change** – When you make a change to a system, the changes will not cascade to the customer products and no confirmation pop-up window will appear.

- **Never Display, Always Changes** – When you make a change to a system, the changes will always be cascaded to the customer products and no confirmation pop-up window will appear.

**Note:** When Oracle Service cascades system-level changes to the associated customer products, it only does so for those customer products that have the old value for the attribute that was changed.

4. Optionally check Use Depot Repair to enable the Depot Repair module.
5. Optionally check Use Access Control to enable the Access Control module.

If Access Control is enabled, you are required to choose a value for the Access Template Entity Code.

**Note:** This module is not currently available.

6. Save your work.

---

## Installed Base Setup

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### Setting Up Customer Product Statuses

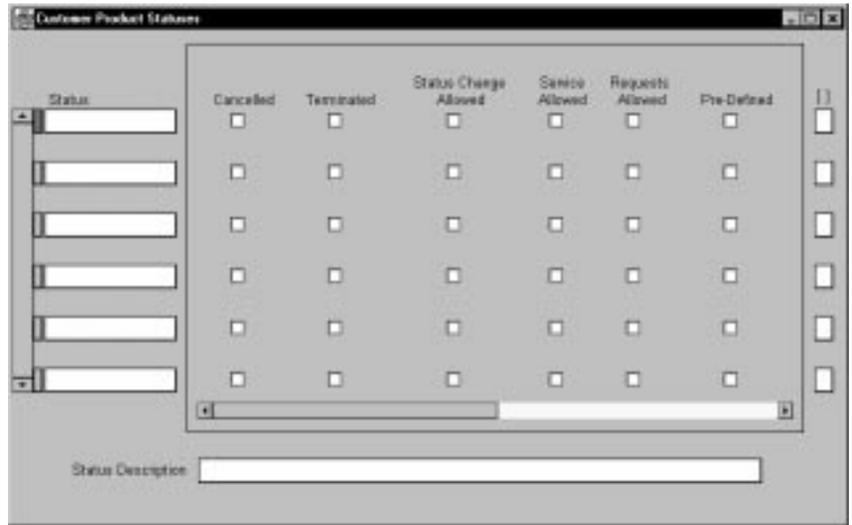
Customer product status codes represent the current state and transactability of a product in the installed base. Each status code controls the level of service program ordering or renewal. Service provides the following status codes:

- **Cancelled** – no more transactions allowed; automatically assigned by the Oracle Order Entry/Shipping Cancel Orders transaction
- **Converted** – product functionality changed
- **Latest** – newest ordered product; automatically assigned to new products sold in Oracle Order Entry
- **Returned** – product returned from the customer
- **Replaced** – customer product replaced; automatically assigned by the Replacement order transaction type
- **Terminated** – service terminated, may be resumed later
- **Upgraded** – customer product upgraded; automatically assigned by the Product Upgrade order transaction type.

Using unique descriptive names, you can create an infinite number of customer product statuses to clearly define each condition. You can change a customer product's status at any time. Automatic assignment of certain status codes (Latest, Cancelled, Upgraded, and Replaced) are designated at the time of the associated transaction. You can update the default information defining these status codes. Any customer product status codes that have Pre-Defined checked are provided and do not permit user updates.

► **To define customer product statuses:**

1. Navigate to the Customer Product Statuses window.



2. Enter a descriptive unique name for the Status.
3. Optionally specify the attributes of the status by choosing:
  - **Cancelled** – no transactions allowed
  - **Terminated** – service may be resumed
  - **Status Change Allowed** – the customer product’s status may be modified
  - **Service Allowed** – service is permitted
  - **Service Requests Allowed** – service request entry is accepted

**Note:** If Pre-Defined is checked, it indicates a provided status code and updates are not permitted.

You can also enter a description, and optionally set Start and End Dates for the status code availability.
4. Save your work.

## Setting Up Customer Product Types

Customer product type QuickCodes explain the type of the customer product or the type of product. An example of a customer product type Code is 'Disk', with a Meaning of 'primary disk drive'. The Description could be 'the main drive in server 1'.

► **To define customer product types:**

1. Navigate to the Customer Product Type QuickCodes window.

Code	Meaning	Description	Enabled	Effective Dates	
				From	To
			<input checked="" type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		

2. Enter a descriptive Code that defines the customer product.
3. Enter a Meaning. The meaning is a short summary of the customer product type.
4. Enter a Description. The description is a full explanation of the customer product type.
5. Optionally check Enabled to implement the new customer product type.
6. Optionally enter Effective From and To Dates. If you choose to leave the dates blank, date restrictions are not set on the customer product type.
7. Save your work.

## Setting Up System Types

System type QuickCodes categorize a system, which is a user-defined logical grouping of customer products. An example of a system type Code is 'HDW', with a Meaning of 'hardware'. The Description could be 'Hardware consisting of drives, power supplies, and monitors'.

► **To define system types:**

1. Navigate to the System Type QuickCodes window.

Code	Meaning	Description	Enabled	Effective Dates	
				From	To
			<input checked="" type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		

2. Enter a descriptive Code that defines the system.
3. Enter a Meaning. The meaning is a short summary of the system type.
4. Enter a Description. The description is a full explanation of the system type.
5. Optionally check Enabled to implement the new system type.
6. Optionally enter Effective From and To Dates. If you choose to leave the dates blank, date restrictions are not set on the system type.
7. Save your work.

---

## Setting Up Order Transaction Types

Order transaction types are a descriptive representation of an order entry transaction that created or modified a customer product. Oracle Service provides five predefined order transaction types:

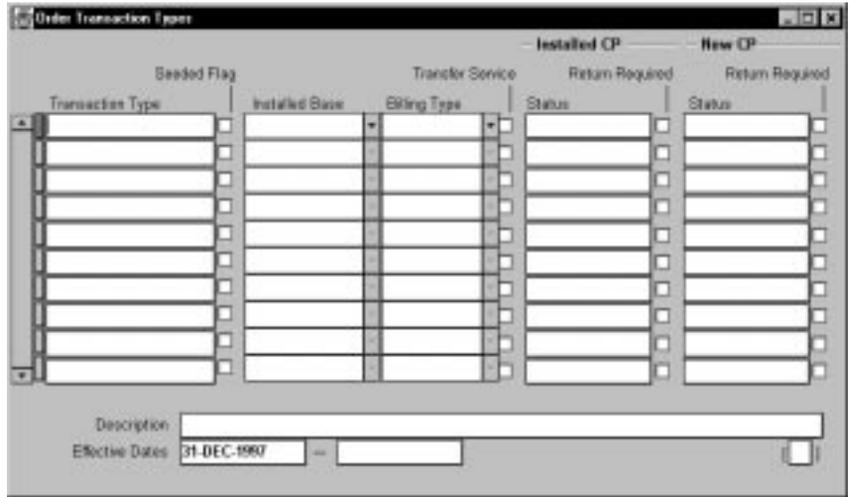
- **AutoCreate Systems** – to create new systems from the Installations window, in the Sales Orders form
- **New** – specifies a new customer product
- **Replacement** – indicates a replaced product
- **Product Upgrade** – defines an upgrade to an existing customer product
- **Revision Update** – indicates a change in an existing customer product's revision status

Order transaction types are used in the Installations window (Sales Orders) in Oracle Order Entry/Shipping. For example, if a serviceable product being ordered is not in the installed base as a customer product, you would select the transaction type New. The Autocreate Installed Base program will create a new customer product in the installed base.

In addition to the five predefined order transaction types, you can create others to identify the type of order entry transaction. You can also designate a customer product status to be assigned automatically to customer products created or modified by each order transaction type.

► **To define order transaction types:**

1. Navigate to the Order Transaction Types window.



2. Enter a unique order Transaction Type.
3. Choose what impact this transaction type has on your installed base.
  - *New Customer Product*: This inserts a new customer product record in the installed base. For example, whenever you ship a loaner to your customer, you can define and use a transaction type named Loaner Transaction so that you can track the loaner.
  - *No Update*: For example, you can define a transaction type named Labor Transaction and specify that it not update any records in your installed base.
  - *Related Customer Product*: This inserts a new record in the installed base that is linked with an existing customer product. For example, you can define a transaction type named Replacement that is associated with a customer product whose status is Replaced. This results in the creation of a new customer product in the installed base whose status is Replacement.
  - *Create Revision Only*: This creates a new revision for an existing customer product in the installed base. You can use the system-defined transaction type Revision Update when you ship a new revision for a given product. You can also specify that this new revision is the latest revision for the product.
  - *Update Status Only*: This updates a customer product's status in the installed base with which the transaction type is associated. For example, you may decide that the transaction type Repair

Transaction updates the status of a customer product to Repaired.

4. Choose the billing type to limit which types of items are affected by this transaction type.
5. Optionally check Transfer Service.  
If the billing type is Material and the installed base impact is Related Customer Product, you can check this box to transfer support services associated with an old customer product to a new one.
6. Optionally select an Installed CP Status if you want to update the statuses of customer products currently present in your installed base.
7. Optionally check Installed CP Return Required.
8. Optionally select a New CP Installed Status.
9. Optionally check New CP Return Required.
10. Save your work.

## See Also

Setting Up Transaction Groups: page 2 – 24

Entering Installation Details During Order Entry: page 3 – 19

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## Setting Up Transaction Groups

You can use transaction groups to group transaction types together so that you can restrict transaction type availability. For example, for your field engineers, define a transaction group called Field Service that allows them only the transaction types relevant to them, such as Labor, Material, Expense, Upgrade, or Replacement. Whenever field engineers use the Charges window to record charges, they are restricted to the transaction types associated with the transaction group that is linked to the service request.

► **To define transaction groups:**

1. Navigate to the Transaction Groups window.

Transaction Groups

Name

Description

Order Type

Depot Repair  Service Request

Field Service

Effective Dates  -

Transactions

Effective Dates

Transaction Type	From	To	[ ]

2. Enter a unique name.
3. Enter a Description.
4. Select an Order Type.

Your selection here will default in the Charges window when this transaction group is used.

5. Check Depot Repair, Service Request, and/or Field Service to indicate to which modules this group applies.

**Note:** Checking the Field Service box automatically checks Service Request as well because the field service process begins with a service request.

6. Optionally enter an effective date range.
7. Select a Transaction Type to assign to this group, and optionally enter an effective date range.

You can add as many transaction types as necessary.

8. Save your work.

## See Also

Setting Up Order Transaction Types: page 2 – 22

Defining Order Types, *Oracle Order Entry/Shipping User's Guide*

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# Support Services Setup

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## Setting Up Service Coverages

Service coverage reflects the service request reporting time stated in days or hours, and the repair expenses supported by the support service program. By setting effective start and end dates, you can phase in or phase out a particular coverage. You can specifically define covered monetary amounts for each service.

► **To define service coverage:**

1. Navigate to the Service Coverages window.

The screenshot shows a window titled "Service Coverages" with the following fields and sections:

- Name: [Text Field]
- Description: [Text Field]
- Effective: [Text Field] - [Text Field]
- Details section with a table:

	Upto Amount	% Covered
Labor	[Text Field]	[Text Field]
Material	[Text Field]	[Text Field]
Expense	[Text Field]	[Text Field]
- Schedules section with a table:

	Start	End
Monday	00:00	00:00
Tuesday	00:00	00:00
Wednesday	00:00	00:00
Thursday	00:00	00:00
Friday	00:00	00:00
Saturday	00:00	00:00
Sunday	00:00	00:00
- Always Covered: [Button]

2. Enter a unique descriptive service coverage Name.
3. Enter a full Description of the service coverage.
4. Optionally enter the Effective Start and Ending dates for service coverage.

**Note:** If you leave the date fields blank, this service coverage has no date limits.

5. Optionally enter Labor, Material, and Expense maximum monetary coverage amounts, then elect to limit the covered monetary amount with a corresponding percentage. For example, you can define

coverage for 50% of labor charges for each repair, up to a maximum of \$600.

6. Optionally define coverage for each day of the week, with up to 24 hour service coverage schedules.

**Note:** You can choose the Always Covered button to assign continuous service coverage to log service requests. If you leave the Schedules section set to the default of 00:00, you are warned there are no coverage time slots defined when service requests are logged.

7. Save your work.

---

## Setting Up Service Availability

Service availability allows or restricts access to specific service programs for specific customers and products. You can further delimit service availability by entering starting and ending availability dates or beginning and ending revisions for the product. You can specify a product revision, or range of revisions. Service availability applies only to service programs, not base warranties included with serviceable products. For example, a computer manufacturer realizes that all computers sold to company A have a faulty motherboard identified with revision G. All motherboards are automatically covered for 3 months after shipment, but in the case of revision G, an extended time of service coverage is being made available. By using service availability, the extended service program is available only to company A with revision G motherboards.

Service availability is checked automatically in each of these functions:

- when selling a service program along with a serviceable product in the Oracle Order Entry/Shipping Sales Orders form
- in the Order Service Programs form
- in the Renew Service Programs form.

If there are no entries for a given service program, then that service program may be applied to any serviceable product for any customer. If there are entries with “Available To” checked, then only those products or customers may receive the service program. If there are entries with “Restricted From” checked, then those products or customers may not received the service program. When determining whether a particular service program may be sold for a particular

product or customer, Oracle Service first checks the “Restricted For” entries, then checks the “Available To” entries.

- If there are no “Restricted From” or “Available To” entries in the list, you may offer the service program for the product or customer.
- If the product or customer exists in the “Restricted From” list, you may not offer the service program for that product or customer.
- If the product or customer does not exist in the “Restricted From” list, Oracle Service checks to see if it exists in the “Available List” list. If so, you can offer it for that product or customer otherwise, you may not.

► **To define service availability:**

1. Navigate to the Service Availability window.

Product	Customer	Revisions		Start Date	End Date	Service Available
		From	To			

2. Choose a Service program to define service availability.
3. Choose Find to locate the service product.
4. Optionally choose Product or Customer.
5. Optionally enter From and To Revisions after entering a product. Entering revisions assumes you have entered a product.
6. Optionally enter Start and End Availability Dates to define the life of the service availability or leave them blank to set no limits.

7. Check Available Only To if the service program should be available only to this product or customer.
8. Check Restricted From if the service program should not be available to this product or customer.
9. Save your work.

---

## Setting Up Renewal Reasons

Use Renewal Reasons to define the renewal QuickCodes. These QuickCodes explain the reason for renewals of service programs. When a service program is renewed, *renew* is the default renewal reason code unless specified otherwise. An example of a renewal reason Code is “expired”. The Meaning is “service has expired”. A Description is “the period of service coverage has expired”.

► **To define renewal reasons:**

1. Navigate to the Renew Service Reason QuickCodes window.

Code	Meaning	Description	Enabled	Effective Dates	
				From	To
			<input checked="" type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		

2. Enter a descriptive Code that explains the reason for renewal.
3. Enter a Meaning. The meaning is a short summary of the renewal reason.
4. Enter a Description. The description is a full explanation of the renewal reason.
5. Optionally check Enabled to implement the new renewal reason.

6. Optionally enter Effective From and To Dates. If you choose to leave the dates blank, date restrictions are not set on the renewal reason.
7. Save your work.

---

## Setting Up Termination Reasons

Termination reason QuickCodes explain the reason for service program termination. When a service program is terminated, *terminate* is the default termination reason code unless specified otherwise. An example of a termination reasons Code is 'Moved'. A Meaning is 'customer moved'. A Description is 'customer moved without forwarding information'.

► **To define termination reasons:**

1. Navigate to the Terminate Service Reason QuickCodes window.

2. Enter a descriptive Code that explains the reason for termination.
3. Enter a Meaning. The meaning is a short summary of the termination reason.
4. Enter a Description. The description is a full explanation of the termination reason.
5. Optionally check Enabled to implement the new termination reason.

6. Optionally enter Effective From and To Dates. If you choose to leave the dates blank, date restrictions are not set on the termination reason.
7. Save your work.

---

# Service Request Setup

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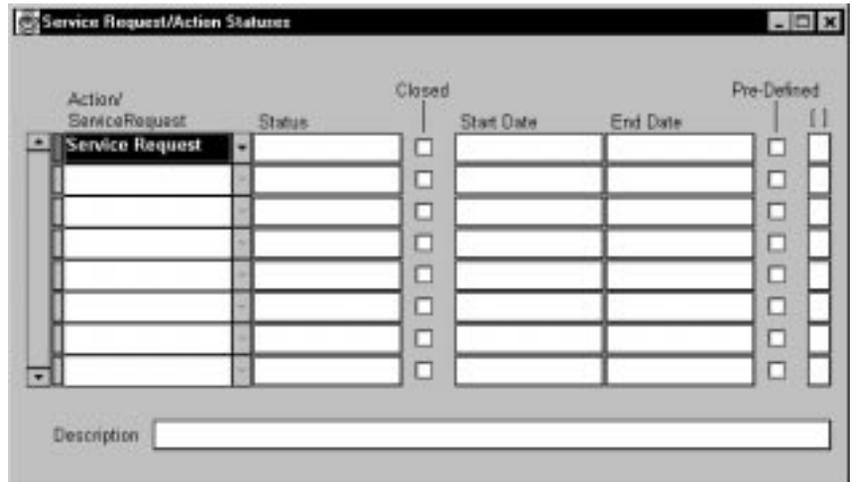
## Setting Up Service Request Statuses

You can define service request statuses to indicate the current state of reported service requests and the actions assigned to them. For example, a customer calls to report a broken switch on his personal computer. You could set the service request status to Open, then create an action with the status Assigned to indicate that the service request has been assigned to a field engineer.

The Open and Closed statuses are predefined.

► **To define service request statuses:**

1. Navigate to the Service Request/Action Statuses window.



2. Select Service Request or Action.
3. Enter a descriptive Status.
4. Optionally check Closed to indicate that service requests with this status should be considered closed.
5. Optionally enter a Start and End Date. These dates set the active time frame for the status. If you choose not to enter dates, the status is always active.

**Note:** The Pre-Defined check box indicates a system-defined code.

6. Save your work.

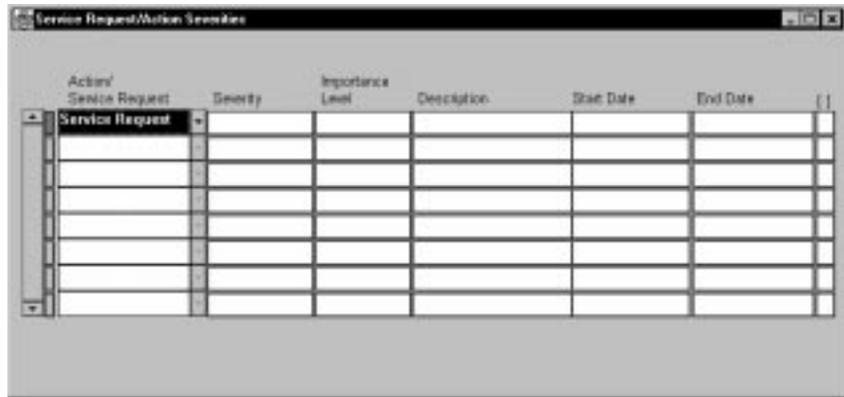
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## Setting Up Service Request Severities

You can define a service request's severity and thereby set the priority. Low, Medium, and High are examples of severities. The service request severity can be applied to either a service request or an action. A service request severity reflects the *support* person's perception of the reported service request and the resulting action.

► **To define service request severity:**

1. Navigate to the Service Request/Action Severities window.



2. Choose Service Request or Action. *Service Request* refers to the reported event. *Action* refers to responses to the reported service request. The service request and actions are referenced together by the Service Request Number. A service request can have multiple actions.
3. Enter a Severity. The severity name gives a general description of the severity, such as low, priority, or critical.
4. Enter a numeric Importance Level, with 1 being the most critical. Importance Level is informational only.
5. Enter a detailed Description of the severity.

- Optionally enter a Start and End Date. These dates set the active time frame for the severity. If you choose not to enter dates, the severity is always active.
- Save your work.

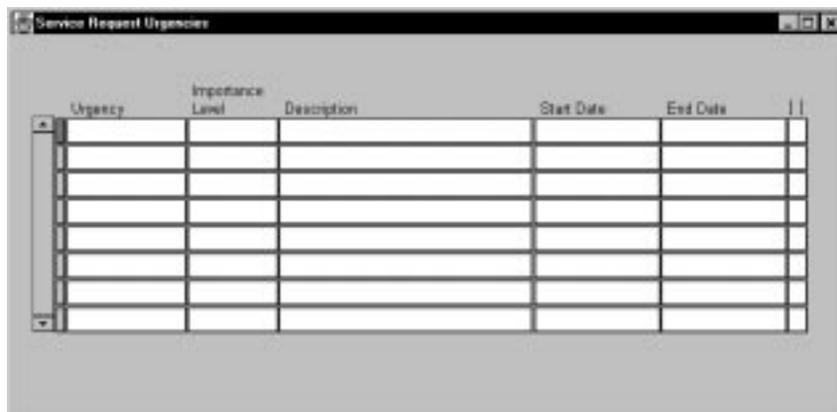
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## Setting Up Service Request Urgencies

You can define a service request's urgency and thereby set the priority. Low, Medium, and High are examples of urgencies. A service request urgency reflects the *customer's* perception of the reported service request.

► **To define service request urgencies:**

- Navigate to the Service Request Urgencies window.



- Enter an Urgency. The urgency name gives a general description of the urgency, such as low, priority, or critical.
- Enter a numeric Importance Level, with 1 being the most critical. Importance Level is informational only.
- Enter a detailed Description of the urgency.
- Optionally enter a Start and End Date. These dates set the active time frame for the urgency. If you choose not to enter dates, the urgency is always active.
- Save your work.

---

## Setting Up Service Request Types

You can define service request and action types to categorize your service requests and actions. You can link a service request type with a transaction group, and link a service request or action type with a workflow. You can also define service request types that can be used by customers logging service requests via the Web.

By associating a workflow process with a service request or action type, you can control the resolution process through which service requests of a particular type pass.

Following are some examples of service request types that you can create:

- Customer Call
- Request for Information
- Customer Complaint
- Defective Product
- Installation Request
- Preventive Maintenance Visit
- Field Service

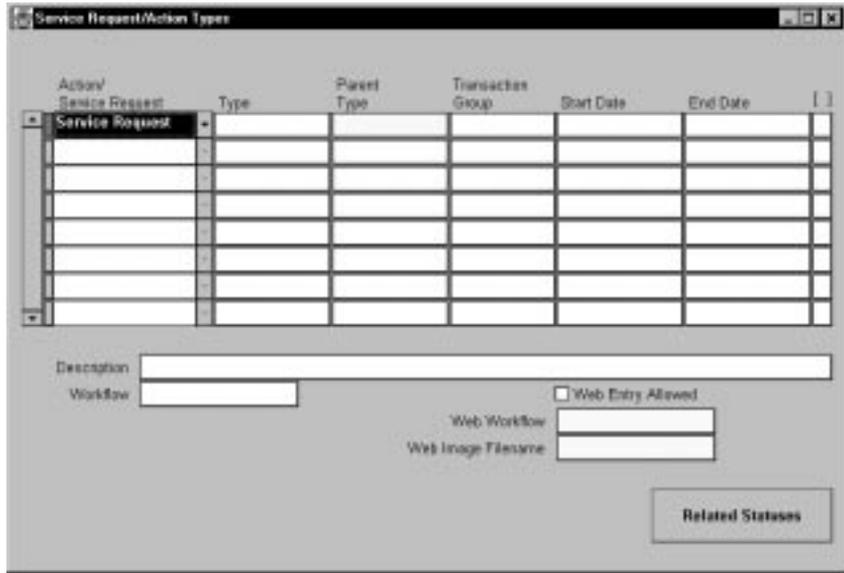
Action types define the kinds of actions you can take for all or specific service request types. When you create an action type, if you select a particular service request type as the parent, then you relate the action type to the service request type. Following are examples of service request types and related action types that you can create:

<i>Service Request Type</i>	<i>Related Action Types</i>
Customer Call	Assignment Analysis Customer Callback Resolution
Defective Product	Assignment Advance Replacement Loaner RMA Entry Loaner Return
Field Service	Engineer Dispatch Engineer Arrival Call for Backup Resolution Call Close

After you define a service request or action type, you can associate statuses with it in the Related Statuses window. These statuses determine the steps necessary to resolve the service request.

► **To define a service request type:**

1. Navigate to the Service Request/Action Types window.



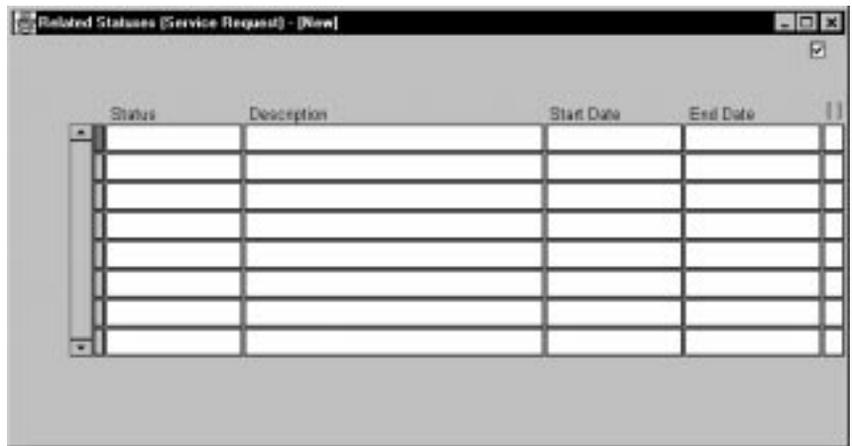
2. Select either Service Request or Action.  
*Service Request* refers to the reported request for service by the customer. *Action* refers to responses to the service request.
3. Enter a Type.
4. If you are defining an action type, optionally select a Parent Type to relate the action type to a specific service request type.
5. If you are defining a service request type, optionally select a Transaction Group with which to associate this request type.  
 The value you select here will default in the Charges window when you enter a charge for a service request.
6. Optionally enter a Start and End Date to set the active time frame.
7. Enter a Description.
8. Select a workflow process to link to this service request or action type.
9. If you are defining a service request type, optionally check Web Entry Allowed.  
 This flag allows you to limit the service request types from which your customers can choose when entering service requests in Oracle Self-Service Web Applications.

If you plan to launch a workflow process automatically whenever a customer enters a Web service request, check **Web Entry Allowed** and select a Web workflow to associate with this request type. The workflow you select here need not be the same as the workflow selected in the previous step. You can also choose an image file to represent the request type on the Web.

**Note:** If you want to launch a workflow process automatically for Web-entered service requests of this type, you must also set the profile option *Service: Auto Launch Web Workflow* to Yes.

10. Save your work.
11. Choose the **Related Statuses** button.

The **Related Statuses** window appears.



12. Select a status from **Service Request/Action Statuses**.  
Note that **Open** and **Closed** are predefined statuses that can relate to all service request and action types.
13. Enter a description.
14. Optionally enter a **Start** and **End Date** to define the active time frame for the related status.
15. Save your work.

## See Also

Service Request Workflows: page 9 – 2

Overview of Depot Repair: page 7 – 3

## Setting Up Problem Codes

A problem code gives meaning to the service request described by the caller. Problem codes isolate the detailed reason for the call. For example, a caller reports a problem with a stereo receiver. Every time they turn it on, it blows the circuit breaker. A problem code of ES, or electrical short, is assigned.

► **To define problem codes:**

1. Navigate to the Request Problem Code QuickCodes window.

Code	Meaning	Description	Enabled	Effective Dates	
				From	To
			<input checked="" type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		

2. Enter a problem Code. A problem Code is a brief representation of the problem. An example of a Code is ES, for electrical short.
3. Enter a Meaning. A Meaning is a brief description of the Code. Electrical short is a Meaning.
4. Enter a full Description of the Code and Meaning.
5. Check Enabled to make the code available for use.
6. Optionally enter a Start and End Date. These dates set the active time frame for the problem code. If you choose not to enter dates, the problem code is always active.

---

## Setting Up Resolution Codes

A resolution code gives meaning to the resolution of the service request described by the caller. Resolution codes isolate the detailed solution for the call. For example, a caller reports a problem with a stereo receiver. Every time they turn it on, it blows the circuit breaker. A problem code of ES, or electrical short is assigned. After careful analysis, a resolution code of RCB with a meaning of replace circuit board is assigned.

► **To define resolution codes:**

1. Navigate to the Request Resolution Code QuickCodes window.

Code	Meaning	Description	Enabled	Effective Dates	
				From	To
			<input checked="" type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		

2. Enter a resolution Code.

A resolution code is a brief representation of the solution to the problem. An example of a code is RCB, for 'replace circuit board'.

3. Enter a Meaning to describe the code briefly.
4. Enter a full Description of the Code and Meaning.
5. Check Enabled to make the code available for use.
6. Optionally enter a Start and End Date.

These dates set the active time frame for the code. If you choose not to enter dates, the code is always active.

7. Save your work.

## Setting Up Message Action Codes

You can use message action codes to specify an action you want a message recipient to take.

► **To define message action codes:**

1. Navigate to the Message Action Request QuickCodes window.

Code	Meaning	Description	Enabled	Effective Dates	
				From	To
			<input checked="" type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		

2. Enter an action Code.  
An action code is a brief representation of the action to perform. An example is Research.
3. Enter a Meaning to describe the code briefly.
4. Enter a full Description of the Code and Meaning.
5. Check Enabled to make the code available for use.
6. Optionally enter a Start and End Date.  
These dates set the active time frame for the code. If you choose not to enter dates, the code is always active.
7. Save your work.

## Setting Up Call Types

You can use call types to track incoming and outgoing calls. For example, you can specify that a call was logged due to the creation of a service request.

► **To define call type codes:**

1. Navigate to the Call Type QuickCodes window.

Code	Meaning	Description	Enabled	Effective Dates	
				From	To
			<input checked="" type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		

2. Enter a Code to represent the type of call being made or received. An example is Request Created.
3. Enter a Meaning to describe the code briefly.
4. Enter a full Description of the Code and Meaning.
5. Check Enabled to make the code available for use.
6. Optionally enter a Start and End Date.  
These dates set the active time frame for the code. If you choose not to enter dates, the code is always active.
7. Save your work.

## Setting Up Call Followup Types

You can use call followup types to enumerate ways of following up on calls. For example, when you log a call, you can specify that you will send the customer a fax to follow up on their request.

► **To define call followup type codes:**

1. Navigate to the Call Followup Type QuickCodes window.

Code	Meaning	Description	Enabled	Effective Dates	
				From	To
			<input checked="" type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		

2. Enter a Code to represent the type of followup that will be made.
3. Enter a Meaning to describe the code briefly.
4. Enter a full Description of the Code and Meaning.
5. Check Enabled to make the code available for use.
6. Optionally enter a Start and End Date.  
These dates set the active time frame for the code. If you choose not to enter dates, the code is always active.
7. Save your work.

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# Field Service Setup

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## Setting Up Field Service Personnel

You can use Oracle Human Resources Management Systems (HRMS) to define employees that belong to your service or support department. These employees can be designated as service personnel and, later, assigned to service requests and dispatched to customer sites based on rules you define.

### Prerequisites

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- Set up your organizational positions. See: *Defining Positions, Oracle Human Resources Management Systems User's Guide.*
- Define your employees. See: *Entering New People, Oracle Human Resources Management Systems User's Guide.*
- Assign employees to positions. See: *Entering a New Assignment, Oracle Human Resources Management Systems User's Guide.*

► **To define employees as service personnel:**

1. Define a new job in Oracle HRMS for field service. See: *Defining Jobs, Oracle Human Resources Management Systems User's Guide.*
2. Associate appropriate positions with the service job you defined in the previous step.

This groups together all of the employees who belong to your service department. See: *Defining Positions, Oracle Human Resources Management Systems User's Guide.*

3. Set the value of the profile option *Service: Support Role in Human Resources* to match the service job you have defined.

The profile's value determines which employees you can select when you dispatch service personnel to address a service request.

### See Also

The Employee Assignment, *Oracle Human Resources Management Systems User's Guide*

Oracle Service Profile Options: page 2 – 9

## Setting Up Support Levels

Support levels distinguish personnel in the same service group. The following table gives some examples of support levels you can define for various service groups.

Business Process	Service Group	Support Level
Field Service	Printer Technician	Level I
		Level II
	PC Technician	Trainee
		Master Technician
Field Service	Customer ABC	Primary
		Secondary
		Tertiary
	Customer CDE	Site A
		Site D
Field Service	Boston	North
		Downtown
		South
	San Francisco	94112
		94165
Support	Application Support	Front-line
		Specialist
	System Support	Morning Support
		Evening Support
Support	Morning Shift	Product Line A
		Product Line B

Business Process	Service Group	Support Level
	Evening Shift	High Priority
		Medium Priority
		Low Priority

► **To define support levels:**

1. Navigate to the Support Levels window.



2. Enter a unique name for your support level.
3. Enter a Description to indicate what the support level represents.
4. Optionally enter Start and End Dates to specify the date range covered by the support level.
5. Save your work.

**Note:** You cannot delete support levels that are associated with service groups.

**See Also**

Setting Up Service Groups: page 2 – 48

## Setting Up Service Groups

Service groups provide a means for classifying your field service personnel into categories that are easy to use. For example, you can categorize field engineers by the types of products they fix, the customers to which they are dedicated, or the geographical regions they serve. You can also use service groups to categorize support personnel. For example, you can group them by the types of problems they solve or the shifts they work.

Personnel can be classified further by support levels that you associate with a service group. For example, you can define the Tech Support and Functional Support support levels and assign them to the Field Service group, or define the Level 1 and Level 2 support levels and assign them to the Technician group.

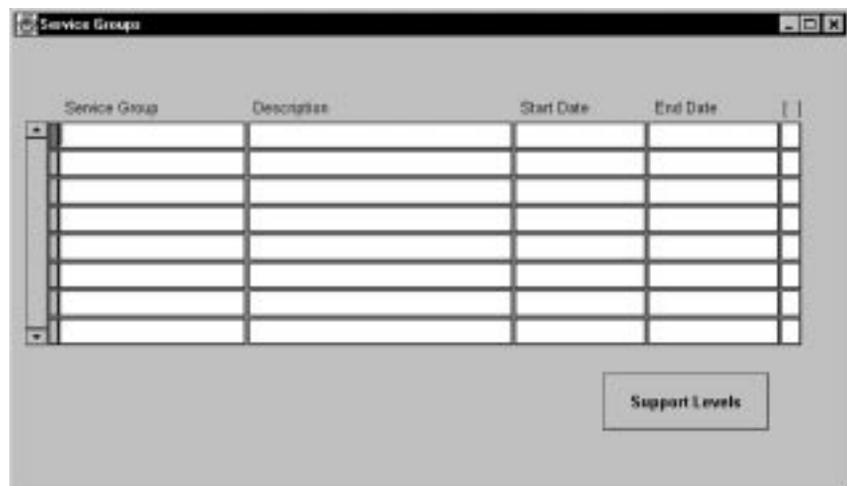
### Prerequisites

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- Define your support levels. See: [Setting Up Support Levels: page 2 – 46](#).

#### ► To define service groups:

1. Navigate to the Service Groups window.



2. Enter a unique name for your service group.
3. Enter a Description to indicate what the service group represents.

4. Optionally enter Start and End Dates to specify the date range for which the service group is active.
  5. Save your work.
- Note:** You cannot delete service groups that are associated with support levels.

► **To associate support levels with service groups and define engineer selection parameters:**

1. Select a service group and choose the Support Levels button.  
The Support Levels for Service Group window appears.



2. Select a Support Level.  
You can use a support level with multiple service groups, but you can select a support level only once within a particular service group.
3. Check appropriate parameters in the Installed Base, Service Request, and Location alternative regions to determine which parameters apply to this service group/support level combination.  
Your selections determine which criteria will be used to select field engineers for dispatching or support engineers for assigning service requests. The available parameters are *Customer*, *Product*, *Service*, *System*, *System Type*, *Product Type*, (service request) *Type*, *Severity*, *Problem*, *Location*, *Country*, *City*, *State*, *Postal Code*, and *Country*.

For example, you have a Technician service group associated with a support level named Level 1. You check the Product box for Technician – Level 1. This allows you to create dispatch rules later that assign some Technician – Level 1 personnel to service one product, while others service a different product. It allows one employee to service more than one product and several employees to service the same product.

4. Save your work.



**Attention:** Once you have selected parameters and saved your work, you cannot modify your selections. You can delete a record only if no dispatch rules exist for the service group/support level combination.

## See Also

Setting Up Support Levels: page 2 – 46

Setting Up Dispatch Rules: page 2 – 50

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## Setting Up Dispatch Rules

After you define support levels and associate them with service groups, you can define dispatch rules. Enter values for parameters, then assign a role to the set of parameters to create a dispatch rule for a particular level/group combination. The values you select here limit your choices in the Engineer Selection and Dispatch window.

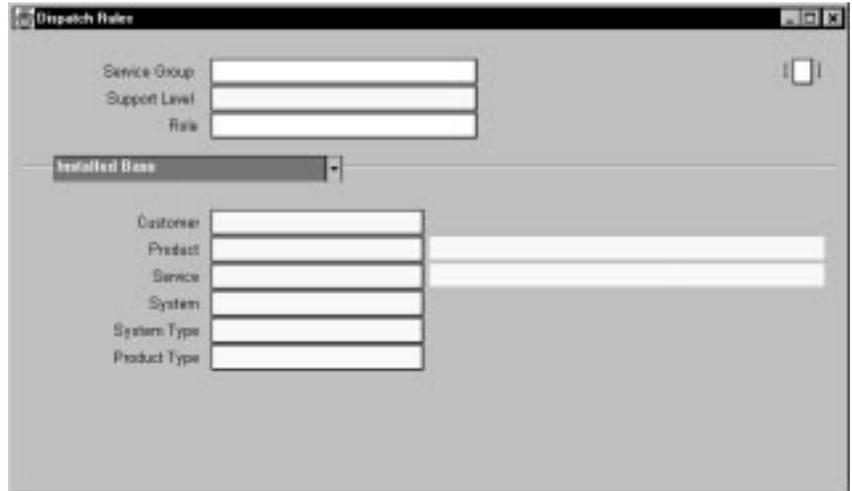
### Prerequisites

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- Define your service groups and assign support levels to them. See: Setting Up Service Groups: page 2 – 48.

► **To define dispatch rules:**

1. Navigate to the Dispatch Rules window.



2. Select a Service Group for which to define rules.
3. Select a Support Level.

Your selection is limited to the support levels associated with the service group you chose. After you select a support level, fields in the Installed Base, Service Requests, and Location alternative regions are enabled based on the parameters you chose in the Support Levels for Service Group window.

For example, if you define State as the only limiting parameter for a particular service group/support level combination, you can specify that one personnel set will later be dispatched for all California field service requests, and another will be dispatched for requests in Georgia.

4. Select a Service Role with which to associate your parameters.
5. In the Installed Base, Service Requests, and Location alternative regions, select specific values for the enabled parameters.
6. Save your work.

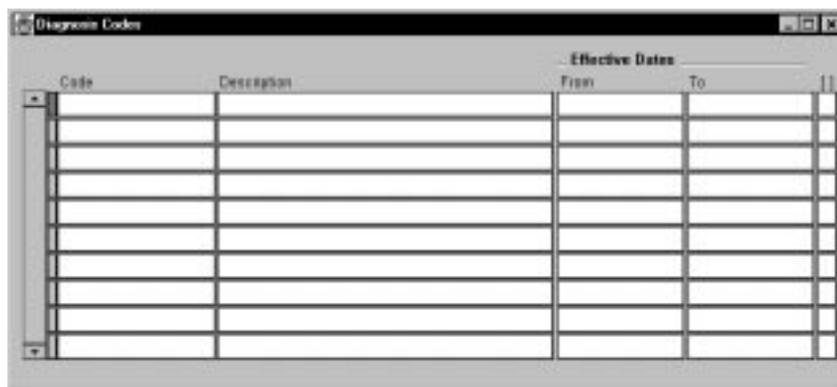
# Depot Repair Setup

## Setting Up Diagnosis Codes

You can define unique diagnosis codes to delineate each repair job. Using a diagnosis code, you can track quality statistics pertaining to each type of repair. If company A sells CD drives for personal computers, and within 3 weeks of installation, each unit is returned for a broken hinge on the drive door, a diagnosis code of CD door hinge can be created. You can use diagnosis codes to group together items for a repair job. Using the example above, if when the hinge on the door breaks, it also ruins the drive door itself, you can create a diagnosis code of CD door assembly. A description would detail which components to replace.

► **To define diagnosis codes:**

1. Navigate to the Diagnosis Codes window.



Code	Description	Effective Dates		
		From	To	

2. Enter a diagnosis Code. The code name you enter is descriptive of the type of repair. An example would be *CD door assembly*.
3. Enter a Description. This entry describes in detail the nature of the diagnosis code. An example related to the code above is: *CD door and hinges are broken, replace*.
4. Optionally check Replace Item. Check this check box if you wish to indicate that the diagnosis requires a replacement item.

5. Optionally enter From and To Effective Dates to identify the date range covered by the code. If there are no dates entered, the code has no time limits.
6. Save your work.

---

## Setting Up Reject Repair Reasons

Reject repair reason QuickCodes explain the reasons for customer product repair rejection. During the depot repair process, you may required a customer approval step before beginning a repair. If so, and the customer decides not to approve a repair, you must enter a Reject Repair Reason.

► **To define reject repair reasons:**

1. Navigate to the Reject Repair Reason QuickCodes window.

Code	Meaning	Description	Enabled	Effective Dates	
				From	To
			<input checked="" type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		
			<input type="checkbox"/>		

2. Enter a descriptive Code name that defines the reject repair reason.
3. Enter a Meaning. The meaning is a short summary of the reject repair reason.
4. Enter a Description. The Description is a full explanation of the reject repair reason.
5. Optionally check Enabled to implement the new reject repair reason.

**Note:** You must check Enabled to enter Effective Dates.

6. Optionally enter Effective From and To Dates. If you choose to leave the dates blank, date restrictions are not set on the reject repair reason.
7. Save your work.

---

## Concurrent Processes

The following concurrent processes are associated with Oracle Service:

- AutoCreate Installed Base
- Depot Repair Control
- RMA Interface
- Service Interface
- Terminate Service
- Update Shipping

You can initiate these processes manually or set them to run at predefined times using the Submit Requests window.

Service Interface, Update Shipping Information, and AutoCreate Installed Base work together to create and update installed base records from transactions in Oracle Order Entry/Shipping. These should be scheduled to run as often as you need to keep the installed base in sync with new sales orders and shipments.

Terminate Service is used with the Receivables Interface concurrent program as you terminate active service programs. It passes service programs credit amounts to the Receivables Interface to create credit memos. You should schedule this program to run periodically, based on the frequency of terminations and credits.

Order Entry/Shipping's RMA Interface works with the Depot Repair Control program to create repair information in Oracle Service as you receive products returned for repair. Depot Repair Control also updates repair information at various stages in the life cycle of each repair and continues to do so until the product ships back to the customer. This program has an optional date range parameter that specifies the period during which products have been received in inventory. Specifying a date range directs the program to create repair information only for products received during that period. If you do not specify any parameters, Depot Repair Control creates repair information for all products for which a receipt transaction has been entered in Oracle Inventory since the last time the program was invoked without parameters. Specifying date range parameters is useful in times when repair information for some products is not created. This can happen under rare circumstances, such as when the RMA Interface cannot update a record locked by another user in Order Entry/Shipping. You should schedule this program to run periodically without any parameters; only run it manually with parameters in case of rare circumstances like the one mentioned above.

## See Also

The Installed Base Interface: page 3 – 13

Terminating Service Programs: page 4 – 7

Receiving Damaged Products: page 7 – 6

RMA Interface, *Oracle Order Entry/Shipping User's Guide*

Service Interface, *Oracle Order Entry/Shipping User's Guide*

Update Shipping Information, *Oracle Order Entry/Shipping User's Guide*

# Installed Base

**T**his chapter provides you with an overview of the Oracle Service installed base and describes how the installed base is populated, maintained, and searched.

This chapter provides you with detailed information about the following:

- Overview of Installed Base Management: page 3 – 3
- Shared Customer Master: page 3 – 3
- Shared Item Master: page 3 – 4
- Automatic Capture from Order Entry: page 3 – 5
- Overview of the Customer Product: page 3 – 6
- Defining Customer Sites: page 3 – 9
- Defining Serviceable Products: page 3 – 10
- Capturing Serviceable Products During Order Entry: page 3 – 12
- Order Types, Order Cycles, and Cycle Actions: page 3 – 12
- Installed Base Interfaces: page 3 – 13
- Agreements: page 3 – 16
- Installation Details: page 3 – 16
- Entering Installation Details During Order Entry: page 3 – 19
- Attaching Documents to Service Records: page 3 – 24

- Defining Customer Products: page 3 – 25
- Customer Products: page 3 – 28
- Finding and Maintaining Customer Products: page 3 – 28
- Customer Products Special Menu: page 3 – 34
- Maintaining Support Services for Customer Products: page 3 – 35
- Viewing System Details: page 3 – 39
- Viewing Customer Product Audit History: page 3 – 39
- Viewing Revisions: page 3 – 40
- Transferring Customer Products: page 3 – 41
- Splitting Customer Products: page 3 – 45
- Systems: page 3 – 48
- Defining Systems: page 3 – 50
- Copying Systems: page 3 – 51

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## Overview of Installed Base Management

The Oracle Service installed base contains detailed descriptions of the products and services sold to your customers. In addition to sales order information, the installed base tracks installation details, product status, and support service history. As your customers order new products and services, or upgrade existing ones, the installed base repository automatically adds new sales order information. Since products may be resold by your customers, Oracle Service lets you transfer product ownership amongst customers in the installed base.

Every line in the installed base is a customer product, which is a specific instance of a product that you have sold to a customer or distributor. The installed base is your information resource to determine each customer's product and installation details, including item numbers, serial and lot numbers, revision history, order numbers, order dates, current status, customer addresses, technical and administrative contacts, prices, quantities, agreements, ship dates, and installation dates.

---

## Shared Customer Master

Oracle Service shares customer master information with other modules such as Oracle Order Entry/Shipping, Oracle Receivables, and Oracle Sales and Marketing. Sharing this critical information across your various applications helps ensure that it is consistent and accurate.

You can define customers in Oracle Order Entry/Shipping, Oracle Receivables, or Oracle Service. For each customer, you can define multiple addresses and specify one or more business purposes for each address. You can use these business purposes to indicate bill-to, ship-to, and installation addresses. You can also define contacts and assign them to a customer or an address, and telephone numbers for a specific address or customer contact. For each customer product in the installed base, Oracle Service tracks up to three addresses (bill-to, ship-to, and installation), as well as four separate contacts (bill-to, ship-to, technical, and administrative). See: *Defining Customer Sites: page 3 – 9*.

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## Shared Item Master

Oracle Service shares item master information with other modules such as Oracle Inventory, Oracle Order Entry/Shipping, Oracle Bills of Material, Oracle Work in Process, Oracle Purchasing, Oracle Master Scheduling/MRP and Supply Chain Planning, and Oracle Quality.

In Oracle Inventory, you can define items that represent products or services that are critical to your service organization, such as:

- serviceable products, which are end items that you wish to track in the installed base after they are sold
- service programs, which represent billable support services such as telephone support, field service support, extended product warranties, etc.
- warranties, which you can attach to a specific serviceable product, are applied automatically when you sell those products
- material, such as replacement parts, used as you repair defective customer products in a depot repair facility
- labor and expenses used in depot repair, field service, or support

Oracle Inventory uses item attribute groups to determine how to treat items in the various Oracle Applications modules that share the item master. Accordingly, the Service attribute group is used by Oracle Inventory and Oracle Service to flag a particular item as a serviceable product, service program, warranty, material, labor, or expense.

You can specify warranties by adding the warranty item to the bill of material for the product that the warranty covers.

For example, assume you sell personal computers. “Pentium Super” is an end product, defined as a serviceable product for installed base tracking. “90-day warranty,” another item, is a warranty that always comes with the Pentium Super. “Hotline support” and “Extended coverage,” two additional items, are billable service programs that you optionally sell along with the Pentium Super, or perhaps sell later when the included warranty expires. “Power supply A” is a material that you sometimes replace in the Pentium Super. “Standard labor rate,” an item with a list price of \$50 and a unit of measure of hours, is billable labor to repair the Pentium Super. “Zone 1 travel expense” is a billable expense for when you have to dispatch an engineer to repair a Pentium Super at a customer site. Each of these is defined in the Oracle Inventory item master, and “90-day warranty” is part of the bill of material for “Pentium Super”.

See: Defining Serviceable Products: page 3 – 10, Defining Service Programs: page 4 – 11, and Defining Warranties: page 4 – 14.

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## Automatic Capture from Order Entry

Oracle Service, in conjunction with Oracle Order Entry/Shipping, populates your installed base as you process customer orders to keep it consistent with actual sales of products and services. As you enter orders in Order Entry/Shipping, you can enter installation details for each product, such as installation addresses, contacts, and logical groupings (systems). You can also define relationships between the new product being shipped out and existing products in the installed base by indicating whether the new product is an upgrade or replacement. In addition, you can indicate service programs to sell along with each product, with coverage dates, prices, and discounts to apply, and then track them in the installed base.

### Service Interface

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Using Order Entry/Shipping's order cycles and the *Service Interface* cycle action, you can determine the point in the order process at which order details are passed to Oracle Service. Based on the order data, Oracle Service's Autocreate Installed Base program adds customer products to the installed base and links existing customer products for product upgrades, revision updates, and replacements.

The Service Interface program processes each sales order line that represents a serviceable product or support service, including the options you select for pick-to-order models, and makes the information available to the Autocreate Installed Base program. Note that the Service Interface program does not process included items, nor does it process subassemblies and components that are part of your product unless they are sales order lines. However, Autocreate Installed Base looks up Order Entry/Shipping data directly and brings non-shippable included items into the installed base, either after the order status reaches the point specified by the profile option *OE: Included Item Freeze Method* or after the line associated with the included items has been scheduled, whichever occurs first.

### Update Shipping

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When you ship products and run the Update Shipping program, Order Entry/Shipping passes shipping information to Oracle Service. This information may comprise quantities, lot and serial numbers, and

revisions of shippable items (including shippable included items). Based on this data, the Autocreate Installed Base program updates customer product information in your installed base. Serial control, lot control, and revision control are item attributes that you can set in Oracle Inventory as you define items.

### **Receivables Interface and AutoInvoice**

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Oracle Order Entry/Shipping interfaces with Oracle Receivables to invoice sales orders that involve serviceable products, service programs, support activities, field service, service requests, and repairs.

### **See Also**

Order Cycles, *Oracle Order Entry/Shipping User's Guide*

Service Interface, *Oracle Order Entry/Shipping User's Guide*

Capturing Serviceable Products During Order Entry: page 3 – 12

Update Shipping Information, *Oracle Order Entry/Shipping User's Guide*

Defining Items, *Oracle Inventory User's Guide*

Receivables Interface, *Oracle Order Entry/Shipping User's Guide*

Importing Transactions Using AutoInvoice, *Oracle Receivables User's Guide*

Submitting a Charge As a Sales Order: page 8 – 10

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## **Overview of the Customer Product**

The customer product, which is an instance of a specific product that you have sold to a customer, is the heart of the Oracle Service installed base. Each customer product record holds information about the customer (addresses and contacts), the product sold (quantities, serial number, revision), the sales order (order number, order date, selling price, agreement), the shipment (shipment date), and the installation (installation date).

You can create customer product records by:

- capturing customer order lines automatically during order processing in Order Entry/Shipping
- defining customer products manually using the Define Customer Products form in Oracle Service

See: Capturing Serviceable Products During Order Entry: page 3 – 12 and Defining Customer Products: page 3 – 25.

### **Customer Product Types**

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You can optionally categorize customer products with user-defined customer product types. For example, you can create and assign customer product types such as Hardware, Software, Under Contract, etc. Note that customer product types are informational only. See: Setting Up Customer Product Types: page 2 – 20.

### **Customer Product Statuses**

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You can use customer product statuses to indicate the current state and transactability of a customer product. For example, customer products generated by new customer orders may be assigned a customer product status of *Latest*. Defective customer products that are returned and replaced can be assigned a status of *Replaced* in the Oracle Service Depot Repair module. When you cancel order lines in Oracle Order Entry, the related customer products in the installed base are automatically assigned a status of *Cancelled*. When you sell a new product upgrade in Order Entry/Shipping, the customer product to be upgraded may be assigned a status of *Upgraded*. You can assign a status of *Terminated* for customer products that are no longer active or supported. In addition to these predefined statuses, you can define your own. Each of these statuses has attributes that define the manner in which they affect the customer product. See: Setting Up Customer Product Statuses: page 2 – 18.

### **Customer Product Transfers**

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If you sell to distributors or dealers, you can transfer customer products from the distributor to an end customer as end customers identify themselves to your support organization. When you transfer customer products, any warranties and service programs attached to transferred customer products will be passed along to the end customer. See: Transferring Customer Products: page 3 – 41.

### **Customer Product Quantity Splits**

---

Each customer product record contains the quantity sold. For serviceable products under serial control, Oracle Service will automatically split the customer product into quantities of one. Each new customer product created from the split carries the same attributes of the original customer product, but has a quantity of one and a

unique serial number. You can also manually split customer products. Reasons for splitting customer product quantities could be:

- isolating a quantity for transfer to an end customer
- setting apart a quantity to terminate
- setting apart a quantity to apply (order) a new service program
- setting apart a quantity to upgrade or repair

See: Splitting Customer Products: page 3 – 45.

### **Customer Product Dates**

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If you ship loaners, advance replacements, or advance exchanges to customers, the return-by date associated with a customer product tracks the date by which your customer is expected to return the replaced, exchanged, or loaned item. Similarly, the installed base keeps track of the date on which the customer returns the replaced, exchanged, or loaned item.

### **Systems**

---

You can optionally group customer products into logical groupings called systems. For example, you can group customer products like printers, monitors, and servers at a customer site into a logical system. One reason to group customer products in this way might be for cotermination of service program end dates for all customer products in the group. Another reason might be that the system represents a place (a floor of a building, an airplane tail number, etc.) where all the customer products in the group are located. See: Defining Systems: page 3 – 50.

### **Customer Product Audit History**

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You can view the audit history of customer products, from the initial customer order, through transfers, splits, additions to systems, cancellations, and terminations. Oracle Service maintains an audit trail of changes, including who made the change and when.

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## Defining Customer Sites

Oracle Service shares its customer master with Oracle Order Entry/Shipping, Oracle Receivables, and Oracle Sales and Marketing, providing you with consistent customer profile information across applications that need to share this information. You can define customers, addresses, location codes, business purposes, contacts, and telephone numbers. Oracle Service consolidates this information for customer products in your installed base. Each customer product includes the following:

- customer name and number
- bill-to location code, address, and contact
- ship-to location code, address, and contact
- installation location code, address, and technical and administrative contact

Each customer address can have one or more business purposes. A unique location code is assigned to each business purpose of each address. You can use this location code to indicate sites in your installed base. Oracle Service offers you two different ways to define an installation site. You can use the ship-to address and location code or the installation address and location code. The ship-to address, which is mandatory for each sales order, is populated automatically in the installed base from sales orders. The installation address is optional. If you enter an installation address during order entry, using the Installations window, it will be copied to the installed base; otherwise, it will be left blank in the installed base customer product record.

### See Also

Overview of Customers, *Oracle Order Entry/Shipping User's Guide*  
Entering Installation Details During Order Entry: page 3 – 19

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## Defining Serviceable Products

As you define items in Oracle Inventory, you can designate them to be serviceable products if you wish to track them in the installed base. Each time you sell a serviceable product in Oracle Order Entry, the Installed Base Interface automatically creates a customer product record in the Oracle Service installed base.

You can define any item in Oracle Inventory to be a serviceable product including items that represent sellable products and services, spare parts, service exchange items, subassemblies, components, etc. Use the Service attribute group in Oracle Inventory to flag items as serviceable products.

You can define a service starting delay for each serviceable product. Oracle Service adds the starting delay to the ship date of the serviceable product to set the start date for service programs and warranty activation. The service starting delay can be used to compensate for shipping and installation times, to ensure your customers receive service coverage for a product when they have the product.

When defining the inventory attributes, make sure that the item attribute control level for the attributes *Support Service* and *Serviceable Product* is set at the Master level. This will ensure consistency in the definition of Support Services and Service Programs.

► **To define a serviceable product:**

1. Navigate to the Service alternative region of the Master Item window in Oracle Inventory.

The screenshot shows the 'Master Item (V1)' form in Oracle Inventory. The 'Organization' field is set to 'V1 Vision Operations'. The 'Item' and 'Description' fields are empty. The 'Service' dropdown is set to 'Service'. The 'Display Attributes' section has radio buttons for 'Master', 'Org', and 'All', with 'Master' selected. The 'Support Service' section has a 'Warranty' checkbox, a 'Coverage' field, and a 'Service Duration' sub-section with 'Value' and 'Period' fields. The 'Serviceable Product' section has a 'Service Starting Delay' field set to '0' and a 'Billing Type' dropdown set to 'Material'.

2. Enter the item and description.
3. Check the Master display attribute.
4. Check the Serviceable Product Flag.
5. Optionally enter the Service Starting Delay.
6. Save your work.
7. Select Organizational Assignment from the Special menu and enable the serviceable product in all inventory organizations in which it will be used.
8. Save your work.

## See Also

Defining Items, *Oracle Inventory User's Guide*

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## Capturing Serviceable Products During Order Entry

You can direct Oracle Order Entry/Shipping to populate the Oracle Service installed base automatically via the Service Interface as you sell products and service programs. To accomplish this, you must define the products as serviceable products, and your order cycles must include the *Service Interface* cycle action.

---

### Order Types, Order Cycles, and Cycle Actions

Order cycles you define in Oracle Order Entry/Shipping determine the processing flow of your sales orders. As you enter a sales order, you designate a user-defined order type that determines the order cycle that will process that sales order.

For example, an order cycle for orders containing products that you typically ship and copy to the installed base might contain the following cycle actions:

- Enter
- Pick Release
- Ship Confirm
- Backorder Release
- Service Interface
- Inventory Interface
- Receivables Interface
- Complete Line
- Complete Order

In the preceding example, the installed base will be populated with customer product information after you ship the product in Order Entry/Shipping.

Note that the Service Interface processes a particular sales order line only once. Therefore, you should place the *Service Interface* cycle action at a point in your order cycle after which sales order changes, like pricing changes or installation detail changes, will not occur. Generally, this is after the *Pick Release* or *Ship Confirm* cycle actions.

Note also that it is not necessary to place the *Service Interface* cycle action in order cycles for returned products. The Service Interface ignores RMAs.

## See Also

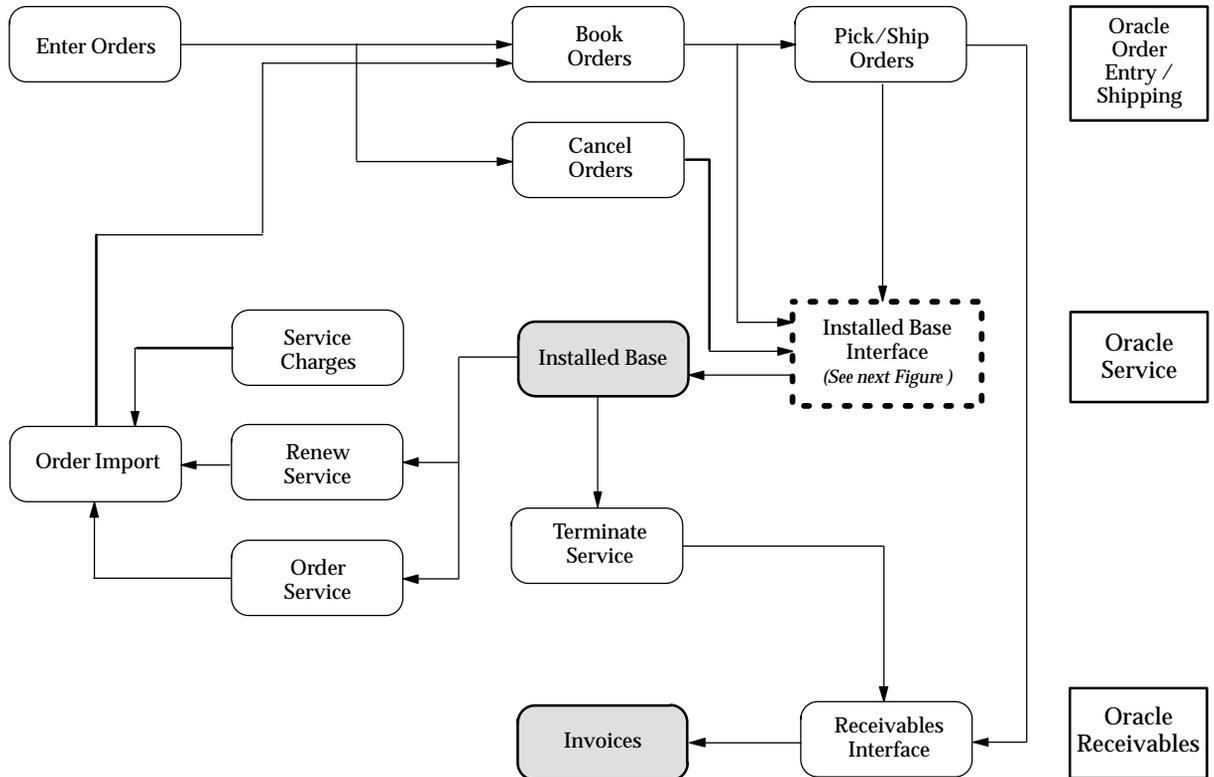
Order Cycles, *Oracle Order Entry/Shipping User's Guide*

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## Installed Base Interfaces

The following figure shows how Oracle Service integrates with Oracle Order Entry/Shipping and Oracle Receivables. After you enter, book, and ship sales orders, the Service Interface and Autocreate Installed Base programs transfer information about sold serviceable products, service programs, and warranties to the Oracle Services installed base. The Installed Base Interface also updates the installed base after order cancellations.

Figure 3 - 1 Installed Base Integration



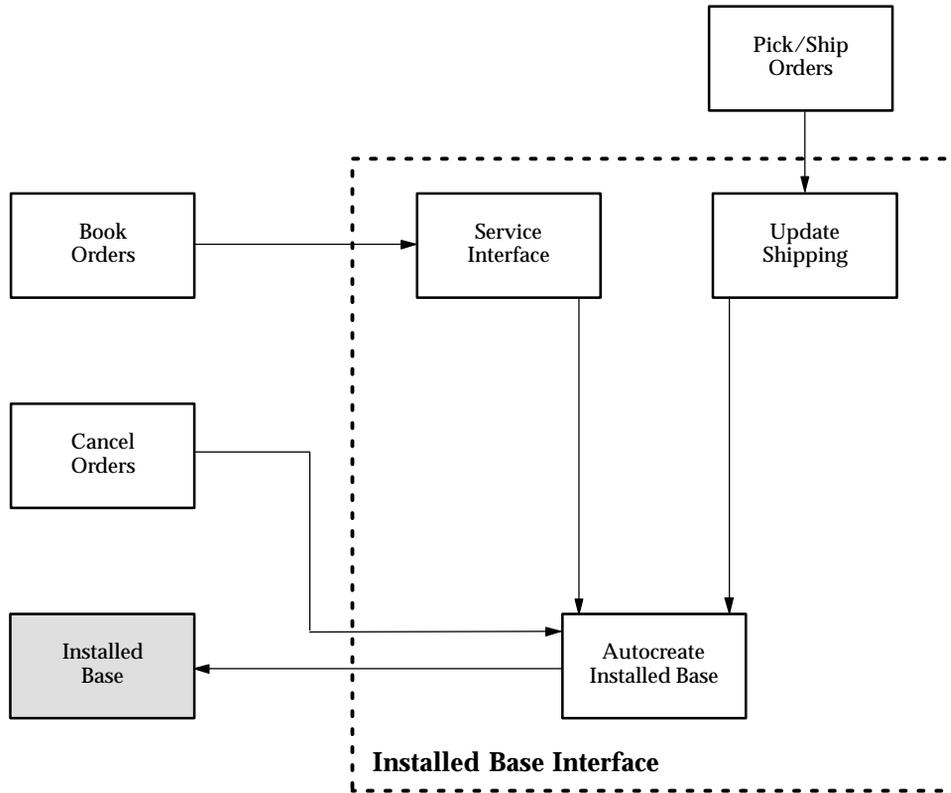
To populate the installed base from Order Entry/Shipping, sales orders must use an order cycle that contains the *Service Interface* cycle action. *Pick Release* and *Ship Confirm* are required cycle actions for shippable orders. *Receivables Interface* is a required cycle action for invoicing to take place in Oracle Receivables.

After a serviceable product is sold and copied to the installed base, it becomes a customer product. You can order a new service program for a customer product, or renew an active service program that is about to expire. When you order or renew service programs for a customer product, Oracle Service uses the Order Import program in Oracle Order Entry. Order Import automatically creates new sales orders for the new or renewed service programs. As you book these sales orders, the Installed Base Interface copies information about the new or renewed service programs to the installed base.

You can also terminate an active service program and credit your customer appropriately. When you terminate a service program, Oracle Service uses the Terminate Service program and the Receivables Interface to create credit memos in Oracle Receivables.

The figure below shows the Installed Base Interface in more detail. This interface consists of three "concurrent programs" which work together to populate and update the installed base. Concurrent programs are background processes that run on a scheduled basis, perhaps hourly or nightly as determined by your system administrator. (Note that "Service Interface" is the name for both a concurrent program and an order cycle action.)

Figure 3 – 2 Installed Base Interface



After you enter, book, and ship sales orders, the Service Interface concurrent program and the Update Shipping concurrent program send order and shipment data to an installed base interface table. The AutoCreate Installed Base concurrent program processes the order data in the interface table to create new customer products, service programs, and warranties in the installed base. As the AutoCreate Installed Base program finds shipping information in the interface table, it updates the customer product records with the ship date, serial numbers, and revision numbers. If you subsequently cancel a sales order that has already been processed by the Installed Base Interface, the Cancel Orders form in Order Entry/Shipping sends the cancellation data to the interface table. The AutoCreate Installed Base program then updates the customer product (i.e., sets the customer product status to *cancelled*) in the installed base.

---

## Agreements

In Oracle Order Entry/Shipping, you can define customer agreements that represent commitments made with a customer for existing and future products and services. Agreements indicate the payment terms, price list, discounts, accounting rule, and invoicing rule to apply to customer orders. An agreement that you indicate on an order will be copied automatically to the installed base for each serviceable product on the order.

Each agreement that you set up can have an accounting rule and an invoicing rule. Accounting rules are used by Oracle Receivables for revenue recognition purposes. You can recognize revenue in the following ways:

- all at once when the product is sold
- periodically (for example, monthly) for a certain number of periods
- in arrears after a certain number of periods

Invoicing rules are used by Oracle Receivables to determine whether to bill in advance or in arrears.

You can designate an agreement at the sales order header level to apply to all serviceable products on an order. In addition, you can designate a different agreement for each service program on an order.

Note that the agreement you designate at the sales order header level is copied to the installed base and is called the product agreement. The agreement you designate for a particular service program, called the service agreement, is not copied to the installed base.

## See Also

Customer Agreements, *Oracle Order Entry/Shipping User's Guide*

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## Installation Details

The Installations window of the Sales Orders form in Oracle Order Entry/Shipping enables you to specify installation information as you create orders for serviceable products. You may enter installation information for any order line which you define as a serviceable product in Oracle Inventory. Note that Order Entry/Shipping determines serviceability of an item based on the service attributes of

the item in the organization specified by the *OE:Item Validation Organization* profile.

You can update installation details in Oracle Order Entry/Shipping before the Service Interface updates the installed base, but not after. If you need to modify installation details after the installed base customer product has been created, you can update the customer product directly in Oracle Service.

In this window you can enter the order transaction type to indicate whether the order is for a new customer product, a replacement, a revision update, etc. You can also enter the installation address, technical contact, and administrative contact for each serviceable product on a sales order. Note that the installation address is an optional address you can track in the installed base.

### **Installation Details for Models and Options**

You can enter installation information for an entire assemble-to-order or pick-to-order configuration by associating it with the top model order line, even if the model item itself is not defined as a serviceable product. In this context, "configuration" means the model, option classes, and options selected during order entry. Oracle Order Entry/Shipping automatically propagates the installation information to all serviceable options of the configuration. You can view and edit automatically created option-level installation information separately from the model-level installation information. You can also enter separate installation information for each serviceable option for which you need to track installations.

### **Order Transaction Types**

Oracle Order Entry/Shipping uses special order transaction types that you set up in Oracle Service for adding to or updating the Oracle Service installed base. In the Installations window of the Sales Orders form, you can use the following system-defined transaction types or types that you define:

- *AutoCreate Systems* – indicates an order entry transaction to associate a new customer product with a newly created logical system and add it to the installed base.
- *New* – indicates an order entry transaction to add a new customer product to the installed base.

- *Replacement* – indicates an order entry transaction to add a new customer product to the installed base, replacing an existing customer product
- *Product Upgrade* – indicates an order entry transaction to add a new customer product to the installed base, upgrading an existing customer product
- *Revision Update* – indicates an order entry transaction to add a new revision to an existing customer product

When you sell a serviceable product in Oracle Order Entry, the system automatically uses an order transaction type of New, which means that the order entry transaction creates a new customer product in the installed base.

If you want to create a logical system for grouping the serviceable products on an order, you can use the AutoCreate Systems order transaction type in the Installations window.

You can use the Replacement order transaction type when you wish to replace an existing customer product with another serviceable product. For example, if you have a service exchange program or wish to replace a returned product, you can use this order transaction type to pick the existing customer product in the installed base that you wish to replace. This transaction type creates a new customer product with a status of Latest (or another status that you define) and changes the existing customer product's status to Replaced.

You can use the Product Upgrade order transaction type to upgrade an existing customer product. An example of a product upgrade would be selling a new 1998 Honda Accord to upgrade (replace) an old 1980 Honda Civic. Similar to the Replacement transaction type, this transaction type lets you pick an existing customer product from the installed base to upgrade with a new serviceable product. The existing customer product and the new serviceable product do not have to have the same item number. This transaction type creates a new customer product with a status of Latest (or another status that you define) and changes the existing customer product's status to Upgraded.

For serviceable products under revision control, you can use the Revision Update transaction type to ship a new revision for an existing customer product. This transaction type creates a new revision for the customer product and changes the product's status to a code you have defined. During shipping, Oracle Order Entry/Shipping prompts you for a revision number for the new product you are shipping. The Service Interface adds this revision number to the revision history of the existing customer product.

Examples of transaction types you might define include the following:

- *Loaner* might indicate an order entry transaction to add a new customer product to the installed base with a status of Loaned and a return date
- *Advance Exchange* might indicate an order entry transaction to add a new customer product to the installed base that replaces an existing product. The existing product's status becomes To Be Returned and the return-by date is defined, while the new product's status becomes Exchanged in Advance.

You can also use transaction types to decide whether new customer products in the installed base (upgrades or replacements) inherit support services from existing customer products.

## See Also

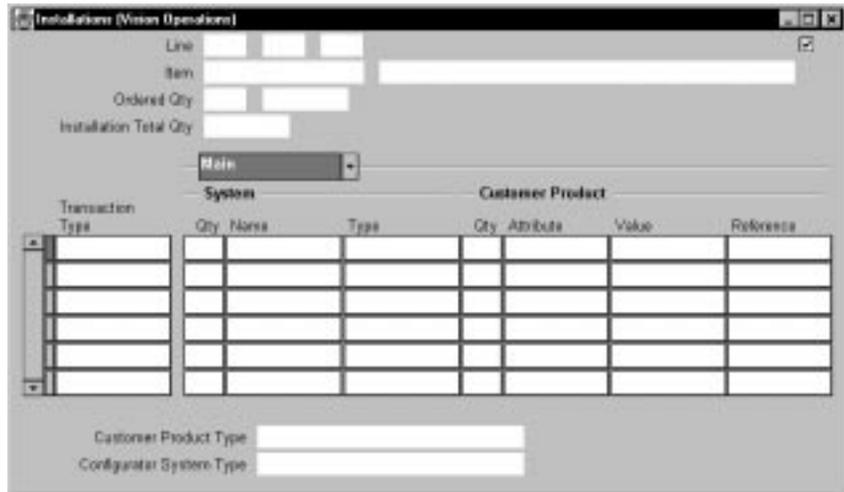
Setting Up Order Transaction Types: page 2 – 22

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## Entering Installation Details During Order Entry

► **To enter installation details during order entry:**

1. Navigate to the Sales Orders window.
2. Enter header information. See: Overview of Sales Orders, *Oracle Order Entry/Shipping User's Guide*.
3. Enter a line item for which to enter installation details.  
The line item must be a serviceable product.
4. Select Installation Details from the Special menu.  
The Installations window appears.



► **To enter the installation location:**

1. Navigate to the More alternative region to enter location, technical, and service contacts.
2. Save your work.

► **To create a logical system that groups customer products automatically during order entry:**

1. Navigate to the Installations window.
2. Select the AutoCreate Systems order transaction type.

**Note:** When the order transaction type is AutoCreate Systems, the Attribute Name, Attribute Value, and Customer Product Reference fields are not updatable by the user.

3. Enter the quantity of systems you wish to have created automatically.

**Note:** The quantity entered cannot exceed the difference between the Ordered Quantity and Cancelled Quantity values.

4. Select the System Type.

System type is a user-defined type for describing the system and is used for information purposes only.

5. Select the Configuration System Type.

This is a user-defined type that describes a system used by Oracle Product Configurator for representing and resolving

configurations. See: *Defining Configurator System Types, Oracle Product Configurator User's Guide.*

6. Save your work.

**Note:** After saving your work, the transaction type is automatically changed from AutoCreate Systems to New. If the System Quantity is greater than one, multiple lines are created with transaction type New, each with a quantity of one.

► **To designate a replacement during order entry:**

1. Navigate to the Installations window.
2. Select the Replacement order transaction type.
3. Select an Attribute Name to define search criteria and locate a specific customer product to replace.

**Note:** For example, if you know the sales order number of a particular customer product in the installed base, select Order Number in the Attribute Name field and enter the order number in the Attribute Value field. This produces a list of all customer product reference numbers for that order number, from which you select the specific customer product you wish to replace. The customer product reference number uniquely identifies any customer product (serialized or non-serialized) in the installed base. The system number, agreement, and customer product type each have a list of values; the order number attribute does not.

**Note:** The profile option *OE:Default CP Selection Attribute* specifies a default for the Attribute Name field.

4. Choose an Attribute Value to refine your customer product search further.
5. Select a Customer Product Reference for the customer product in the installed base that you wish to replace.
6. Save your work.

**Note:** Active service programs associated with the replaced customer product are not automatically transferred. If desired, you can terminate the service for the replaced product and order new services.

► **To designate a product upgrade during order entry:**

1. Navigate to the Installations window.
2. Select the Product Upgrade order transaction type.

3. Select an Attribute Name to define search criteria and locate a specific customer product to replace.

**Note:** For example, if you know the sales order number of a particular customer product in the installed base, select Order Number in the Attribute Name field and enter the order number in the Attribute Value field. This produces a list of all customer product reference numbers for that order number, from which you select the specific customer product you wish to upgrade. The customer product reference number uniquely identifies any customer product (serialized or non-serialized) in the installed base. The system number, agreement, and customer product type each have a list of values; the order number attribute does not.

**Note:** The profile option *OE:Default CP Selection Attribute* specifies a default for the Attribute Name field.

4. Select an Attribute Value to refine your customer product search further.
5. Select a Customer Product Reference for the customer product in the installed base that you wish to upgrade.
6. Save your work.

**Note:** Active service programs associated with the upgraded customer product are not automatically transferred. If desired, you can manually terminate the service for the upgraded product and order new services.

► **To designate a revision update during order entry:**

1. Navigate to the Installations window.
2. Select the Revision Update order transaction type.
3. Select an Attribute Name to define search criteria and locate a specific customer product to replace.

**Note:** For example, if you know the sales order number of a particular customer product in the installed base, choose Order Number from the Attribute Name field and enter the order number in the Attribute Value field. This produces a list of all customer product reference numbers for that order number, from which you select the specific customer product you wish to update. The customer product reference number uniquely identifies any customer product (serialized or non-serialized) in the installed base. The system number, agreement, and customer product type each have a list of values; the order number attribute does not.

**Note:** The profile option *OE:Default CP Selection Attribute* specifies a default for the Attribute Name field.

4. Select a Customer Product Reference for the customer product in the installed base that you wish to update.

**Note:** If the serviceable product is under revision control in Oracle Inventory, the shipping transaction prompts you for the revision number you wish to ship. Oracle Service captures this revision number and adds it to the revision history of the customer product you specify in the Customer Product Reference field.

5. Save your work.

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## Attaching Documents to Service Records

Attachments enable you to link unstructured data, such as images, word-processing documents, spreadsheets, and text, with Oracle Applications records. For example, you can link images of a broken video projector to a service request. Oracle Service provides the predefined *Miscellaneous* category.

You can attach one-time documents from the following windows:

- Customer Products
- Customer Products Summary
- Repairs
- Service Requests
- Service Requests Summary
- Actions
- Knowledge Base Search Results

► **To attach documents to a Service record:**

1. Navigate to one of the windows that supports attachments.
2. Select a record.
3. Choose the Attachments (paper clip) icon from the toolbar.

The Attachments window appears. See: *Attachments Window, Oracle Applications User's Guide*.

**Note:** You can only view attachments when you open the Attachments window from the Knowledge Base Search Results window. However, you can insert, update, or delete attachments when you open the Attachments window from any of the other windows listed above.

## Defining Customer Products

You can enter customer product information directly into the installed base, if desired, without creating sales orders in Oracle Order Entry/Shipping. For example, you can define customer products that represent third-party products installed at your customers' sites. The Define Customer Products window enables you to:

- create customer product records
- create revision records for customer products
- optionally create warranty records attached to the customer product you define
- differentiate manually defined customer products from those automatically created by the Installed Base Interface

► **To define a customer product manually:**

1. Navigate to the Define Customer Products window.
2. Select a customer from the shared customer master.
3. Select a serviceable product.
4. Enter the unit of measure and quantity.
5. Save your work.

► **To enter product attributes:**

1. Navigate to the Product Attributes alternative region in the Define Customer Products window.

The screenshot shows the 'Define Customer Products (Visual Operations)' window. The title bar includes standard window controls. The main area contains several input fields and a dropdown menu. At the top, there are fields for 'Customer' and 'Customer Number'. Below these are fields for 'Product' and 'Description', followed by 'Qty' and 'Reference'. A 'Product Attributes' dropdown menu is positioned below the 'Qty' field. Underneath the dropdown, there are fields for 'Serial Number', 'Lot Number', 'Status', and 'Effective' date, along with a 'Create Warranty' checkbox. On the right side, there are fields for 'Revision', 'Type', and 'System', and a small icon at the bottom right.

2. Optionally enter a serial number or lot number.
3. Choose a customer product status.
4. Optionally enter an effective start and end date.
5. Optionally enter a revision number.
6. Choose a customer product type.
7. Optionally choose a system to link the customer product to.
8. Check the Create Warranty check box if you want to create a new warranty record for the customer product. When you check the Create Warranty check box, Oracle Service creates an active warranty for the serviceable product. See: Defining Warranties: page 4 – 14 for details on defining warranties. If you enter an installation date in the Install/Billing region, the start date of the warranty will be the installation date.  
  
Otherwise, the start date of the warranty will be the current date, plus any service starting delay defined for the serviceable product.
9. Save your work.

► **To enter installation and billing addresses:**

**Note:** You must first define a customer address, location code, and contact in Order Entry/Shipping before you can select the information in this window.

1. Navigate to the Install/Billing alternative region in the Define Customer Products window.
2. Choose an installation location code. You must first define the location code as a business purpose for the customer and address in Order Entry/Shipping.
3. Choose the customer for the installation.
4. Choose installation address.
5. Enter the installation date.
6. Choose a bill-to location code. You must first define the location code as a business purpose for the customer and address in Order Entry/Shipping.
7. Choose the bill-to customer for the installation.
8. Choose the installation address.
9. Choose the bill-to customer contact.

10. Save your work.

► **To enter shipping information:**

**Note:** You must first define a customer address, location code, and contact in Order Entry/Shipping before you can select the information in this alternative region.

1. Navigate to the Shipping alternative region in the Define Customer Products window.
2. Choose a ship-to location code. You must first define the location as a business purpose for the customer and address in Order Entry/Shipping.
3. Choose a ship-to customer.
4. Choose the ship-to address.
5. Choose the ship-to customer contact.
6. Save your work.

► **To enter service contact and order information:**

1. Navigate to the More alternative region in the Define Customer Products window.
2. Choose the technical contact from the contact master.
3. Choose the administrative contact from the contact master.
4. Optionally enter a customer purchase order number.
5. Optionally enter a sales order number and sales order date.
6. Save your work.

---

## Customer Products

A customer product is an instance of a particular product you have sold to an end customer or distributor. The customer product reference number uniquely identifies any customer product (serialized or non-serialized) in the installed base. A customer product is further distinguished by a quantity, serial number (if the serviceable product it represents is under serial control in Oracle Inventory and has been assigned a serial number at the time of shipment), its location code (bill-to, ship-to, and installation location), contacts, order information, and revision history.

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## Finding and Maintaining Customer Products

Oracle Service offers you powerful search criteria for finding all customer products for a particular customer, or a specific customer product serial number. You can apply various combinations of customer product attributes in your search, such as location, status, contact, and order number.

► **To find and maintain customer products:**

1. Navigate to the Customer Products window.

The Find Customer Products window appears.

The screenshot shows the 'Find Customer Products (Vision Operations)' window. It features three main sections for data entry:

- Customer:** Fields for Customer Name, Customer Number, Install Location, Postal Code, and Technical Contact. An 'Include Related' checkbox is located between Customer Number and Install Location.
- Order Information:** Fields for Order Number, Order Date, Product Agreement, and PO Number.
- Customer Product Information:** Fields for Product, System, Status, Reference, Copy License Ref, Support Service, and Serviced Status. A 'Most Recent' dropdown menu is positioned between Support Service and Serviced Status. On the right side of this section are fields for Serial Number, Revision, Original Ref, and Type.

At the bottom right of the window are 'Clear' and 'Find' buttons.

2. Enter or select information from one of the available fields to find the record to view or modify.

To reduce the number of records that are displayed, you can narrow your search by entering data specific to your customer. For example, choose an Install Location, choose a Product, then choose Active yes or no.

- Check the Include Related option if you want to find all customers related to the customer you enter in the Customer Name or Customer Number fields. Checking Include Related widens the search to incorporate other customers defined as related by Order Entry/Shipping customer relationship setup.
- Install Location is the location code for the installation address.
- Product Agreement is the customer agreement from the sales order header.
- Purchase Order Num is the customer's purchase order number, from the sales order header.
- Status is the customer product status.
- Reference is the unique reference number assigned to the customer product automatically by the Installed Base Interface.
- Copy License Ref refers to the reference number of the customer product of which the current customer product is a copy. This applies to certain types of products like software.
- Support Service means a particular service program or warranty assigned to a customer product.
- The Serviced Status field enables you to search for customer products covered or not covered by a support service, depending on the setting you choose. There are four choices:
  - **Current or Future** – Either **Current** or **Future**.
  - **Future** – A service program exists for the customer product, but has not started yet.
  - **No** –No support services exists for customer product.
  - **Yes** – Customer product is currently under a service program or warranty.
- The Active field enables you to search for currently active or inactive customer products.
- Original Ref refers to the reference number of a parent customer product, or a customer product that was upgraded or replaced.

- The Most Recent field enables you to look up the newly upgraded customer product.
  - Type is the customer product type.
3. Choose Find.
  4. Choose the record to maintain then choose Open.
  5. Enter your changes and save your work. See: Defining Customer Products: page 3 – 25.

► **To change customer product attributes information:**

You can add or change the customer product attributes to meet the changing requirements of your customers. For example, you can change the status to reflect cancellations, no service, renewed service, transferred products, or termination. Optionally, you can modify Status, System, Effective Dates, Product Agreement, Revision, Type, or Service Agreement. By entering a system name in this region, you can link customer products to the system.

1. Enter search criteria in the Find Customer Products window and choose Find to navigate to the Customer Products Summary window.



2. Select the record to view or modify, then choose Open.  
The Customer Products window appears.

3. Navigate to the Product Attributes alternative region.
  - **Revision** – You can select from a list of revisions that the customer product has gone through and make any one of the revisions the current revision.
  - **Status** – You can change the status of a customer product to any of the predefined or user-defined status. In particular, if you choose a status which has its cancelled flag attribute or terminated flag set to Yes, the customer product's effective end date is set to the system date. Once a customer product is set to a status with a cancelled flag attribute of Yes and the work is saved, the status cannot be updated.
  - **Effective End Date** – When you choose an effective end date for a customer product, you will be prompted with a list of statuses to choose from which have their terminated flag attributes set to Yes.
4. Enter your changes.
5. Save your work.

► **To change install/billing information:**

You can add or change the product install/billing information as customers relocate or change their contacts to meet their business needs. You can modify Installed At, Customer, Address, Install Date, Bill To, Customer, Address, Contact, or Email. Note that the customer,

address, and location must exist in the customer master before a change can take place.

1. Enter search criteria in the Find Customer Products window and choose Find to navigate to the Customer Products Summary window.

2. Select the record to view or modify, then choose Open.

The Customer Products window appears.

3. Navigate to the Install/Billing alternative region.

**Note:** If you choose an installation site, the customer and the address information is filled in automatically. If you choose to enter the customer name, you can manually enter the installation site and address. An installation site includes one customer and address, while a customer may have many installation sites and addresses.

- **Installation Date** – If you choose to enter an install date for the customer product, you will have the choice of cascading/setting the start date of the warranty associated with the customer product within the dialog box that pops up.

4. Enter your changes. If you choose Yes, all the warranties for the customer product will be modified:

- start date = new installation date

- end date = start date + duration

If you choose No, warranty dates are not updated.

5. Save your work.

► **To change shipping information:**

You can add or change the product shipping information. For example, Company A has two terminals that are part of system 775. You can give each terminal, or serviced customer product, a different shipping location for correct delivery. You can modify Ship to, Customer, Address, Contact, and Email.

1. Enter search criteria in the Find Customer Products window and choose Find to navigate to the Customer Products Summary window.

2. Select the record to view or modify, then choose Open.

The Customer Products window appears.

3. Navigate to the Shipping alternative region.

**Note:** If you choose a shipping site, the customer and address information is filled in automatically. If you choose to enter the customer name, you can manually fill in the Ship To name and address. A ship-to location has one customer and address, while a customer may have many ship-to sites and addresses.

4. Enter your changes.
5. Save your work.

► **To change more (miscellaneous) product information:**

You can modify Technical and Administrative Service Contacts, Email, or Copy License Ref.

1. Enter search criteria in the Find Customer Products window and choose Find to navigate to the Customer Products Summary window.
2. Select the record to view or modify, then choose Open.  
The Customer Products window appears.
3. Navigate to the More alternative region.
4. Enter your changes.

**Note:** The Copy License Ref refers to the reference number of the customer product of which the current customer product is a copy. This applies to certain types of products like software.

5. Save your work.

---

## Customer Products Special Menu

This section lists the available options on the Special menu for the Customer Products windows.

<b>Split Product</b>	See: Splitting Customer Products: page 3 – 45
<b>Comments</b>	See: Entering Comments: page 5 – 25
<b>Included Items</b>	See: Maintaining Support Services for Customer Products: page 3 – 35

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## Maintaining Support Services for Customer Products

You can view comprehensive support service information about your customer products, while you monitor both current and historical data. You can also view transactions, transaction details, and customer product service details. For example, you can view customer product services to determine how many products have a particular type of service, or you might want to know what type of service program can be applied to a customer product. Viewing customer product services enables you to determine which service programs are about to expire, and then initiate the steps to renew them.

► **To modify the start and end dates for a service program:**

**Note:** You must set the profile option *Service: Allow Service Date Change* to Yes to be able to modify start and end dates.

1. Enter search criteria in the Find Customer Products window and choose Find to navigate to the Customer Products Summary window.
2. Select a line, then choose Services.
3. Enter Service Start and Service End dates.

The original start and end dates show the values entered when the service was ordered or renewed.

4. Save your work.

**Note:** Changing the effective dates does not impact any financial termination. For example, if you extend the service end date, your customer will not be billed. Similarly, if you shorten the time before the service ends, a credit memo will not be raised.

► **To view included items for a service program:**

1. Enter search criteria in the Find Customer Products window and choose Find to navigate to the Customer Products Summary window.
2. Select a line, then choose Included Items from the Special menu.

The Included Items window appears.

The screenshot shows a window titled "Included Items". At the top, there are two input fields: "Order Number" and "Order Date". Below these is a table with five columns: "Product", "Reference", "Serial Number", "Lot Number", and "Ship Date". The table has several empty rows. At the bottom of the window, there are two input fields: "Product Description" and "Quantity". An "OK" button is located in the bottom right corner.

3. Choose OK.

► **To view service programs:**

1. Enter search criteria in the Find Customer Products window and choose Find to navigate to the Customer Products window.
2. Select a line, then choose Services.
3. Optionally choose Transactions or Open for more information.

► **To view service program transactions:**

1. Enter search criteria in the Find Customer Products window and choose Find to navigate to the Customer Products window.
2. Select a line, then choose Services.
3. Choose the Transactions button to view the transaction history.
4. Optionally choose Details for additional transaction information.

► **To view service program details:**

1. Enter search criteria in the Find Customer Products window and choose Find to navigate to the Customer Products window.
2. Select a line, then choose Services.
3. Choose Open to view additional service information.
4. Optionally navigate to the following alternative regions:

- Service Attributes
- Current Transaction
- Billing Information
- Service Coverage
- Serviced Product Attributes

► **To view service attributes:**

You can view the Service Program's Duration, the Service Order Number, Order Date, Selling Price, and Total Amount from this region. Detailed transaction information is also available.

1. Enter search criteria in the Find Customer Products window and choose Find to navigate to the Customer Products window.
2. Select a line, then choose Services.
3. Choose Open to view additional service information.
4. Choose Service Attributes.
5. Optionally choose Transactions, then Details to view transaction history and additional transaction information.

► **To view the current transaction:**

You can view information about the current transaction from this region. You can determine the Transaction Type, Transaction Status, Invoicing Rule, Accounting Rule, and Payment Term.

1. Enter search criteria in the Find Customer Products window and choose Find to navigate to the Customer Products window.
2. Select a line, then choose Services.
3. Choose Open to view additional service information.
4. Choose Current Transaction.
5. Optionally choose Transactions, then Details to view transaction history and additional transaction information.

► **To view billing information:**

You can view Bill To, Customer, Address, Contact, Price List, and Pricing Attributes from this region.

1. Enter search criteria in the Find Customer Products window and choose Find to navigate to the Customer Products window.

2. Select a line, then choose Services.
3. Choose Open to view additional service information.
4. Choose Billing Information.
5. Optionally choose Transactions, then Details to view transaction history and additional transaction information.

► **To view service coverage:**

You can view the service coverage of your customer product in this region. You can view the labor, material, and expense coverages as well as the days and hours of coverage. See: Setting Up Service Coverages: page 2 – 27.

1. Enter search criteria in the Find Customer Products window and choose Find to navigate to the Customer Products window.
2. Select a line, then choose Services.
3. Choose Open to view additional service information.
4. Choose Service Coverage.
5. Optionally choose Transactions, then Details to view transaction history and additional transaction information.

► **To view serviced product attributes:**

You can view information about the serviced customer product in this region. You can view the Reference, Serial Number, Status, Effective dates, Product Agreement, Quantity, Revision, System, and Service Agreement.

1. Enter search criteria in the Find Customer Products window and choose Find to navigate to the Customer Products window.
2. Select a line, then choose Services.
3. Choose Open to view additional service information.
4. Choose Serviced Product Attributes
5. Optionally choose Transactions, then Details to view transaction history and additional transaction information.

---

## Viewing System Details

A system is a user-defined, logical grouping of customer products. You can view specific system data about your customer products, including installation, billing, shipping, and contact information. If the system you are viewing has a parent system, the parent's system number is displayed.

► **To view system details:**

1. Enter search criteria in the Find Customer Products window and choose Find to navigate to the Customer Products window.
2. Choose the record to view, then choose Systems.



The screenshot shows a window titled "System Details" with the following fields and sections:

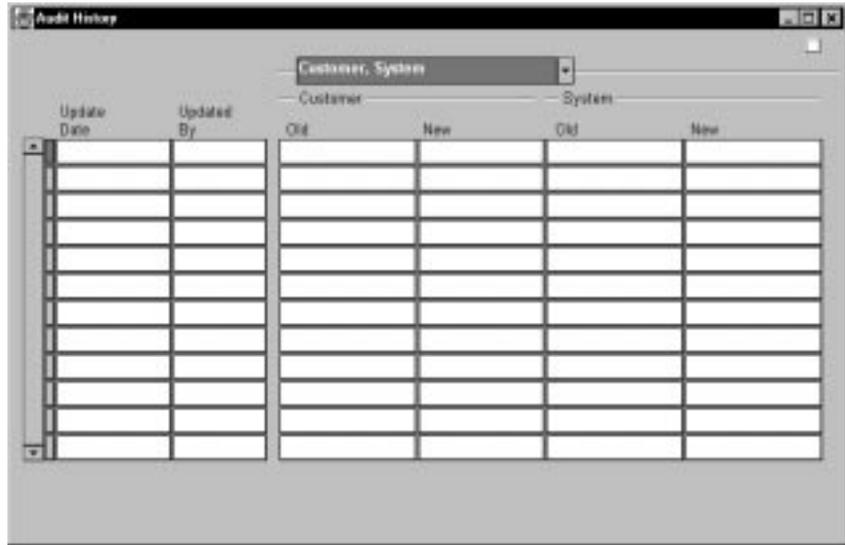
- System Information:** System, Parent System, Customer, Type.
- Description:** Description, Serial Number, Effective From, Terminate Date.
- Install:** Installed At, Customer, Address.
- Ship To:** Ship To, Customer, Address, Contact.
- Bill To:** Bill To, Customer, Address, Contact.
- Other Contacts:** Technical, Administrative.
- Buttons:** OK.

---

## Viewing Customer Product Audit History

You can view the audit history of customer products from the initial order, through upgrades, transfers, splits, system additions, and cancellations. Using audit history, you can determine why changes have taken place, and see the continuity of actions throughout the life of the customer product. The Old and New fields represent changes that have impacted audited attributes.

- **To view a customer product's audit history:**
1. Enter search criteria in the Find Customer Products window and choose Find to navigate to the Customer Products window.
  2. Select the record to view, then choose Audit.



3. Optionally navigate to the following alternative regions:
  - Customer, System
  - Agreement
  - Type, Status
  - Split Product

---

## Viewing Revisions

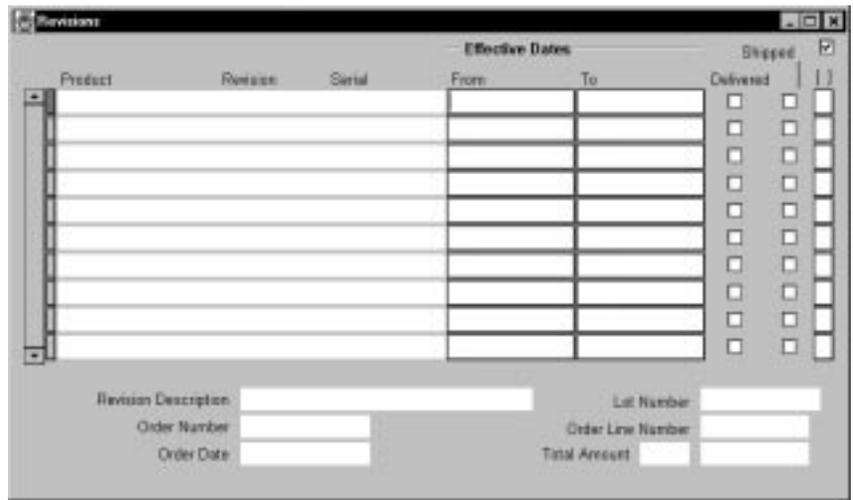
You can view customer product revisions in the installed base for any customer product. Each customer product will have one or more revisions associated with it. When a customer product is created in the installed base, a revision is automatically created for it. If a new revision of the product is ordered using Order Entry/Shipping, Oracle Service automatically creates a new revision for that product. At any given time, only one of the revisions is considered the current revision

of any customer product. You can choose which revision to make active in the Customer Products summary window.

If the profile *Service:Set Customer Product to Latest Revision* is set to Yes, Oracle Service makes any newly defined revision for a customer product the current active revision.

► **To view revisions:**

1. Enter search criteria in the Find Customer Products window and choose Find to navigate to the Customer Products window.
2. Select the record to view, then choose Revisions.



3. Optionally enter Effective From and To Dates.
4. Save your work.

---

## Transferring Customer Products

You can track customer products sold by distributors to end users or a transfer of ownership between customers. Multiple customer products can be transferred at a time. All support services associated with a customer product being transferred will continue to be associated with the same customer product.

Note that you must first define the new customer in the customer master before transferring a customer product.

► **To transfer customer products:**

1. Navigate to the Transfer Customer Products window. The Find Customer Products window appears.

The screenshot shows a window titled "Find Customer Products (Vision Operations)". It contains three main sections of input fields:

- Customer:** Customer Name, Customer Number, System, Install Location, Technical Contact, and an "Include Related" checkbox.
- Order:** Order Number, Order Date, PO Number, Product Agreement, and Service Agreement.
- Customer Product:** Product, Status, Reference, Most Recent (dropdown), Active (dropdown), Serial, Revision, Original Ref, Type, and Order By (set to System).

At the bottom right, there are "Clear" and "Find" buttons.

2. Enter or choose information from one of the available fields to find the record to view or modify. You can narrow your search by entering data pertinent to your customer. For example, choose an Order Number, a Product, then choose a Status. A selection of this nature reduces the number of records that are displayed. Choose Find.
3. Choose a customer product to transfer.
4. Choose a New Customer name to transfer the customer product to.
5. Optionally choose a System to transfer.
6. Choose Open to fill in the new customer information, if necessary. The Transfer Product Information window appears.

Transfer Product Information

Current Customer

Product

Reference  Serial  Status

**Transfer**

New Customer  New System

Comments

Contacts

	Name	Customer
Technical	<input type="text"/>	<input type="text"/>
Administration	<input type="text"/>	<input type="text"/>
Bill To	<input type="text"/>	<input type="text"/>
Ship To	<input type="text"/>	<input type="text"/>

Audit Transfer

7. As you finish entering your data, you are moved from the Contacts region to the following regions to complete the required data.

- Agreements
- Install Address
- Bill To Address
- Ship To Address

**Note:** Choosing Transfer in the last region saves your work. Choosing Action Save from the menu will also save your work and effect the transfer.

► **To define new customer contacts:**

Define the required new customer contacts information when a customer product is transferred.

1. Choose a Technical Name.
2. Choose an Administration Name.
3. Choose the Bill To Name.
4. Choose the Ship To Name.

► **To define new customer agreements:**

Define the required new customer agreement information when a customer product is transferred.

1. Choose a product from the Product Name field.
2. Choose a service from the Service Name field.

► **To define a new customer install address:**

Define the new customer install information when a customer product is transferred.

1. Choose an Install Location, Customer, and Address.

► **To define a new customer bill to address:**

Define the new customer Bill To information for the transferred customer product.

1. Choose a Bill to Location, Customer, and Address.

► **To define a new customer ship to address:**

Define the new customer Ship To information when a customer product is transferred.

1. Choose a Ship to Location, Customer, and Address.
2. Choose Transfer to complete the transaction and save your work.

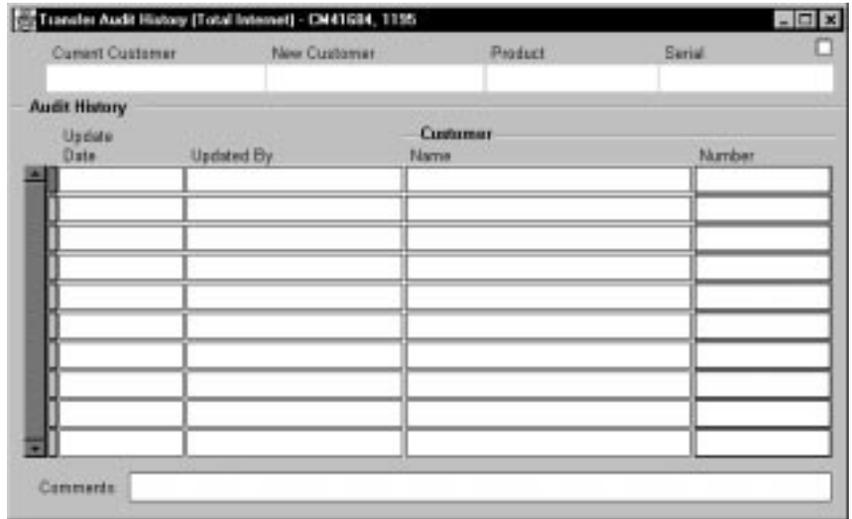
**Note:** You are warned if all the required information is not complete.

► **To view audit transactions from transfer customer products:**

You can view historical transfer transactions against a customer product to follow the changes in ownership. You can view Update dates, Updated By, Customer Name, and Customer Number.

1. Navigate to the Transfer Customer Products window. The Find Customer Product window appears.
2. Enter or choose information from one of the available fields to find the record to view from the Find Customer Products window. You can narrow your search by entering data pertinent to your customer. For example, choose an Order Number, a Product, then choose a Status. A selection of this nature reduces the number of records that are displayed. Choose Find.

3. Choose a record to view, then choose Audit.



---

## Splitting Customer Products

You can split any active customer product that

- has a quantity greater than one
- is the most recent version
- is not an ATO or part of an ATO configuration
- is not currently reserved for update or upgrade
- is not currently pending service
- is not currently reserved for order creation
- is not associated with a service reserved for termination

The product can be split into two quantities that add up to the original quantity or into units of one each. Splitting by fractions is not allowed.

Splitting a customer product isolates a particular quantity for additional processing such as transfer between customers or locations, additional service programs or cancellation. After splitting customer products, you can transfer the split quantity, terminate service programs, and add or renew service programs to the split quantity.

You can track products through their splits and view the resulting changes in quantity.

For example, a need to split customer products may arise when products are sent to a central distributor, then are divided between subsequent customers. 100 office security systems are purchased by the distributor. After negotiations, 25 security systems are sent to customer A, 50 to customer B, and the rest remain at the distributor. Another example is where customer A orders 10 personal computers. The first five computers are used only five days a week, while the second five are used seven days a week. The computers are split into groups of five to allow the application of different service programs.

New customer products created from a split retain the same attributes as the parent customer product. Total order amounts are split according to each new quantity. For example; a quantity of five with an order value of \$5000.00 split into quantities of two and three becomes \$2000.00 and \$3000.00, respectively. Revisions and audit history are automatically created along with the associated split amounts.

► **To split customer products:**

1. Enter search criteria in the Find Customer Products window and choose Find to navigate to the Customer Products window.
2. Select the record to split, then choose Split Product from the Special menu.



3. Enter a quantity in the First Quantity field without exceeding the total quantity of the line item in the Customer Products window.

**Note:** If you are splitting the quantity into items of one each, leave the First Quantity field blank before checking Split into Quantities of One Each.

4. Select the Split Reason.



---

## Systems

You can arrange customer products into groups called systems for service management or distribution of responsibility. An example of a system is a grouping of customer products such as printers, work stations, and servers supported by a service program that maintains computer hardware.

For example, company A builds surveillance systems. Each system consists of video cameras, recorders, microphones, and motion detectors. The number of each component depends upon the size of the company and the number of installation sites. Each component is covered by a service program. Using systems, you can specify the installation location of each component of the system, and the technical contacts at that location.

For each system you define, you need to enter a system name, the customer who owns the system, and the type of the system you are defining. You can enter more information for your system, if desired, such as a description of your system, the location at which the system is installed, and dates through which the system is valid.

You can also specify a calendar day and month for cotermination of all support services that have been ordered for customer products assigned to the system. This would determine the expiring calendar date for all support services that will be ordered for the customer products assigned to the system.

Oracle Service uses many attributes of a system, such as the install, shipping, and billing locations and contacts, as defaults for the corresponding attributes of any new customer products you define and place under the system. If you change the values of these attributes for the system, Oracle Service references your setting of the implementation option set using the Service Parameters form "System Changes Decision-Point Window Usage" to determine how the change you made to the system-level attribute affects the corresponding customer product-level attribute.

- **Display** – Oracle Service displays a pop-up window asking you to indicate whether you want the attribute value changed at the customer product-level.
- **Never Display, Never Change** – Oracle Service neither displays any pop-up window nor changes customer product-level attributes when you change system-level attributes.

- **Never Display, Always Change** – Oracle Service does not display the pop-up window, however, it does cascade your system-level changes to the customer products.

When Oracle Service cascades system-level changes to the associated customer products, it only does so to those customer products that have the old value for the attribute that was changed.

You can group user-defined configurations of customer products into systems, labeling each with a unique descriptive name. You can transfer customer products between systems. You can define specific locations, billing, primary contacts, or system effectivity dates. To link product information to a system, enter a system name in the Customer Products window.

Use Copy Systems to automatically generate one or multiple systems based on the current configuration, then optionally view the new copied systems, each with an individual numeric identifier recorded into the installed base.

## **See Also**

Cotermination: page 4 – 8

## Defining Systems

- To define a system:
  1. Navigate to the Systems window.

The screenshot shows a software window titled "Systems (Vision Operations)". It contains several sections of input fields:

- System Information:** Fields for System, Customer, Parent System, Effective From, Description, Number, System Num, Type, and Calendar Day-Month.
- Install:** Fields for Installed At, Customer, and Address.
- Bill To:** Fields for Bill To, Customer, Address, and Contact.
- Ship To:** Fields for Ship To, Customer, Address, and Contact.
- Other Contacts:** Fields for Technical and Administration.
- Config System Type:** A dropdown menu.
- Buttons:** "View Products" and "Copy Systems" buttons at the bottom right.

2. Make sure the following profile options are set:
  - *Service:Auto-generate System Name*
  - *Service:System Name Update Allowed*
  - *Service:Cascade System Termination*
  - *Service:Customer Product Termination Status*

**Note:** If profile options are not set correctly, contact your System Administrator.

**Note:** If the profile option *Service: Auto-generate System Name* is set to No, you can manually enter any unique name for the system. Otherwise, it is automatically generated. If the profile option *Service: System Name Update Allowed* is set to Yes, you can update the system name at any time.

3. Enter a system description.
4. Choose a Customer and specify a type for the system.

5. Optionally you can enter a Parent System, System Num, Type, Effective From and To, Coterminate Day and Month, Installed at location, Customer, Address, Bill To and Ship To Customers, Addresses, and Technical and Administration Contacts. A system type refers to the description of the system as a whole. Examples of systems would be: hardware, software, CPU, or communication. These types of systems represent logical groupings of customer products. A System Number can be any number you specify, such as a serial number.

**Note:** By choosing either Installed At, Bill To, or Ship To, the customer and address information are filled in automatically. If you enter the customer name, you are prompted to choose a Ship To title from the list. A title has one customer and address, while a customer may have many title sites and addresses.

- If you choose to specify a Coterminate Day, you will have to enter both a day and a month.
  - If the Oracle Service profile option *Service:Cascade System Termination* is set to Yes, then when you enter a date for the system to be terminated on (Effective to Date), Oracle Service will set all the customer products that are assigned to the system to terminate on the same day. Oracle Service will also update the status of the customer products using the status specified in the profile option *Service:Customer Product Termination Status*.
  - If Oracle Product Configurator is installed, and if the profile *BOM:Configuration Installed* is set to Yes, you can enter a value for configuration system type.
6. Optionally choose Copy Systems to create one or multiple new systems based on the current configuration.
  7. Save your work.

You can view all customer products associated with a system by navigating to the View Products window.

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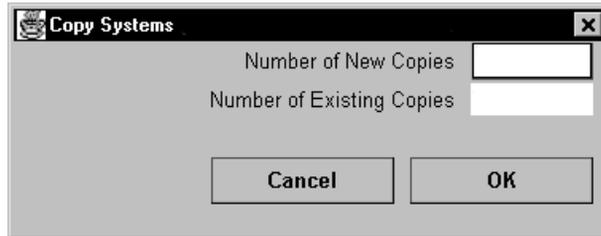
## Copying Systems

You can copy one or multiple systems based on the attributes of the currently defined system. Each new system automatically receives a unique numeric name. All other characteristics of the new system are the same as the base system. For example, you have created a system comprised of a PC, fax machine, laser printer, and scanner. You need 14 additional identical systems. Instead of entering the same data 14

times, Copy Systems takes the base system data and creates the 14 new systems.

► **To copy a system:**

1. Navigate to the Copy Systems window.



2. Enter the Number of New Copies.

**Note:** To view previously copied systems for the currently defined system, leave the Number of Existing Copies value set to 0.

3. Choose OK.

# Support Services

**T**his chapter provides you with an overview of the support services of Oracle Service, including service programs and warranties. An explanation of how customer service programs and warranties are defined, ordered, updated, and reviewed is provided.

This chapter provides you with detailed information about the following:

- Overview of Support Services: page 4 – 3
- Flexible Service Programs: page 4 – 3
- Warranties: page 4 – 4
- Activating Service: page 4 – 5
- Service Coverage: page 4 – 5
- Controlled Service Availability: page 4 – 5
- Service Program Pricing: page 4 – 6
- Ordering Service Programs: page 4 – 6
- Renewing Service Programs: page 4 – 6
- Terminating Service Programs: page 4 – 7
- Automatic Service Program Billing: page 4 – 7
- Service Transaction History: page 4 – 7
- Cotermination: page 4 – 8

- Defining Support Services: page 4 – 10
- Service Programs: page 4 – 10
- Pricing Service Programs: page 4 – 10
- Defining Service Programs: page 4 – 11
- Warranties: page 4 – 13
- Defining Cotermination Dates: page 4 – 13
- Defining Warranties: page 4 – 14
- Viewing Support Services for Customer Products: page 4 – 17
- Modifying Support Service Duration: page 4 – 20
- Ordering Service Programs with Product Orders: page 4 – 21
- Service Programs for Models and Options: page 4 – 21
- Service Duration: page 4 – 22
- Service Activation: page 4 – 23
- Ordering Service Programs with Products: page 4 – 24
- Ordering Service Programs after the Product Sale: page 4 – 26
- Renewing Service Programs: page 4 – 30
- Terminating Service Programs: page 4 – 34
- Canceling Service Order Lines: page 4 – 37

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## Overview of Support Services

Support services enable your customers to make better use of the products you sell. Using Oracle Service you can create service programs and warranties that represent the various support services that you want to provide your customers.

Service programs are billable support services that help you meet your customers' diverse support needs. For example, service programs can represent extended warranties or agreements to provide telephone support. When purchased by customers, these service programs can be attached to serviceable products, which lets you define the service entitlement of your customers for that product.

A warranty that is attached to a serviceable product is applied automatically when you sell that product. The price of the warranty is assumed to be incorporated in the product price.

---

## Flexible Service Programs

With Oracle Service you can create, maintain, and administer as many service programs as are necessary to meet the service needs and price expectations of each market segment that you service. The following are some scenarios that describe how service programs can be used to support your customers:

- Provide targeted support based on product characteristics.  
For example: to support a low-priced, high-volume product you can define a service program for hotline support. To support a more complex, higher-priced product you can define a service program for on-site support.
- Provide multiple service programs to support the same product.  
For example, a customer who uses your product for critical applications can purchase a service program that ensures support 24 hours a day, seven days a week while a customer who uses the product for less critical applications can purchase a service program that limits support to weekdays.
- Allow customers to purchase multiple service programs for the same product.  
For example: one service program may not satisfy all of a customer's needs, so a customer can purchase multiple service programs for the same product. If your customer wants both

hotline support and regular preventive maintenance, you can define two different service programs that can be attached to the same customer product.

Defining service programs that support each market segment's unique needs lets you meet the expectations of all your customers. For example, in Oracle Order Entry, you can price each service program to achieve the market penetration and volume that you need to sustain and grow your service organization or your business.

Service programs also let you design mass customization solutions. You can provide service solutions that not only satisfy customers but also help you retain and generate additional business. To ensure better administration, you can control the availability of your service programs by product, by customer, or a combination of both. To simplify the management of service programs, you can coterminate a group of service programs at the same time, so that they can be renewed at the same time.

Oracle Service enables you to track the status of each service program purchased by a customer regardless of the time of its purchase. Customers can order service programs at the same time as a product order, or later when the customer requires support. You can also identify expiring service programs and notify your customers, which prevents a break in the support services they receive.

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## Warranties

Warranties allow you to associate a support service with a product automatically. You can define a warranty as a component in the bill of material for a serviceable product. The warranty record is automatically associated with the customer product in the installed base upon ordering and shipment of the product to the customer. Just like service programs, warranties are defined by the hours of coverage provided and the scope of the service coverage in terms of material, labor, and expense.

Each serviceable product can be shipped with one or more base warranties defined as components in the product's bill of material.

---

## Activating Service

Oracle Service offers several ways to activate or start the support services your customers receive for your product. During order entry, you can specify start and end dates for service programs, or you can specify the start dates only and let Oracle Order Entry/Shipping determine the end dates from service program duration information.

You can define the Service Starting Delay when you define serviceable products in Oracle Inventory. The Service Starting Delay represents the time in days a service program or warranty is offset to commence after the shipment date. For example, a radio has a service starting delay of five days. If the radio ships on January 15, five days are added to the shipment date and the service program starts on January 20. The start date of the warranty is the ship date plus the starting delay. The end date is calculated by adding the duration to the start date of the support service.

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## Service Coverage

Service coverages list the actual days during the week and hours during the day when your customers may request service. When you define a service coverage you also determine what percentage of labor, material, and expenses is covered, and whether a maximum limit exists for each. You can define as many coverages as you need, then associate each with a service program or a warranty. Because your service personnel have on-line access to your customers' service information, they can verify whether customers are contacting them at authorized times, or whether material, labor, and expenses are covered by a support service.

---

## Controlled Service Availability

By default, a service program is eligible to service any serviceable product. You can limit the availability of a service program by product, customer, or both.

By default, a serviceable product does not include a warranty unless you specified the warranty as a component in the serviceable product's bill of material.

---

## Service Program Pricing

You can flexibly price your service programs using price lists in Oracle Order Entry/Shipping. You can assign fixed or variable amounts to each of your service programs. Fixed prices are expressed as actual prices on the price list, whereas variable prices are expressed as percentage to be applied to the price of the serviceable product. When you enter sales orders in Order Entry/Shipping for the service programs your customers have ordered, Order Entry/Shipping references the appropriate price list to find or dynamically calculate the price of your ordered service programs. You can then adjust the determined price by applying discounts.

---

## Ordering Service Programs

As you enter sales orders for serviceable products, you can select one or more service programs to cover each serviceable product. The serviceable product and its service program(s) will then be on the same sales order and the same invoice.

You can also sell service programs after the sale of the serviceable product. For example, you sell a telephone with a warranty that expires after 90 days. After 90 days, your customer decides to purchase extended service coverage for the telephone. You can then sell the extended coverage as a service program three months after the original sale.



**Attention:** Service programs must always apply to a serviceable product and cannot be sold without referencing a serviceable product.

Regardless of how you start your service order, you can choose from a variety of order processing options, including dynamically calculated service program prices, price adjustments, sales credits, and approval cycles that you can apply to the entire order or specific order lines.

---

## Renewing Service Programs

You can renew your service programs before they expire. The Expiring Services Report lists service programs and warranties that are due to expire, by customer. To renew service, you can use the Renew Service Programs window to select the service programs, by customer, that you

want to renew. Your sales orders are created in Oracle Order Entry/Shipping for service program renewals.

---

## Terminating Service Programs

When you want to terminate a service program, you can use the Terminate Service Programs window to select and terminate specific service programs, by customer. By default, credits are calculated by prorating the days remaining in the service program duration. You can optionally create credit memos via the interface with Oracle Receivables for the prorated credit amount.

---

## Automatic Service Program Billing

You can automatically invoice or credit your customers, as appropriate, for service programs they purchase, renew, or terminate. Oracle Service uses Oracle Receivables, via the Receivables Interface, to create invoices for service programs on sales orders, or to create credit memos for service programs that you terminate. Using Oracle Receivables invoicing rules, you can bill in advance or in arrears.

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## Service Transaction History

On-line inquiries show detailed information about the products your customers have and the support services they have recorded against each product in addition to the history of all transactions relating to the support services. You can use this information to search for and analyze trends for the way your customers order and use support services, including which services they renew most often, which services they terminate most often, the average length of time for which they order service programs, and to which products they rarely (or frequently) apply service programs.

You can view the transaction history of the following:

- any service program or warranty
- all support services for a particular product
- all support services for a particular customer

- when a customer purchased a service program for a given product
- when a customer renewed or terminated a service program
- how much a customer was charged for a service program or renewal of a service program
- when service programs or warranties for a particular customer are due to expire

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## Cotermination

Oracle Service enables you to specify a common expiry date (cotermination date) for all service programs for a specific customer or system. You can set this date at the customer level so that all service programs for products ordered by a particular customer end simultaneously, or at the system level so that all service programs for products associated with a particular system end simultaneously.

Cotermination is used to determine the end date for service programs that you order for new products in Order Entry/Shipping or for existing products in Oracle Service. The system cotermination date is checked first; if none is found, Oracle Service checks the customer cotermination date.

Suppose you set a cotermination date at the *system* level for October 31, and a customer cotermination date for December 1. Service programs first check for the system cotermination date and set the end dates to October 31. If no date had been set at the system level, when the system was defined, the customer level cotermination date is used. Another customer has five systems, each with a different cotermination date. For each system, the individual cotermination date becomes the cotermination date for that system *only*. In turn, if the system had not been assigned a cotermination date, the customer cotermination date would be used.

A customer is notified late in December that the current service programs covering their power generators will be replaced on December 1 of the following year with a more comprehensive service program, and the current service program will not longer be valid. A cotermination date is set at the customer level of November 30. The same customer renews a current service program in January for an existing power generator. In March, the customer orders three more power generators and service programs for other sites. All service programs are checked for cotermination. All four service programs

will coterminate on November 30, so the new service programs can start on December 1.

If a service program is ordered, if there is no cotermination date set at either the customer or system level, and if the Coterminate check box has been checked when ordering the service program, the cotermination date is the end date of the service program and the duration is one year. For example, if a service start date is June 26, 1996, the cotermination date is June 25, 1997.

Any service programs applied to customer products use the cotermination date that is current at either the system level or the customer level. If you should change the cotermination date at either the customer or system level, services ordered *after* the change use the new cotermination date. For example, if a customer level cotermination date is August 31, and five service programs are ordered for customer products in February, the cotermination date is August 31. If the date is then changed to July 31, and new service programs are ordered, the cotermination date for the existing five service programs remains August 31, but the cotermination date for the new service programs is July 31. All subsequent new service programs have the July 31 cotermination date until the date is changed.

You can also define a minimum service duration (in days) with the *Service:Minimum Service Duration* profile option. For example, you have a cotermination day and month of December 31, and a minimum service duration of 30 days. All services ending on or before December 1 coterminate on December 31 of the *current* year, and services ending after December 1 coterminate on December 31 of the *following* year. If coterminating a service program sets its duration to less than the minimum duration, then the service program will be set to coterminate during the following year.

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## Defining Support Services

You can use Oracle Service to set up unlimited kinds of support services to cover the products you sell and service. There are two general kinds of support services:

- service programs, which you can select during order entry to apply to serviceable products
- warranties, which are automatically applied to specific serviceable products and activated at the time of product shipment or product installation

Both kind of support services can have flexible coverage terms and durations.

---

## Service Programs

A service program represents a billable support service that can be applied to serviceable products. Any kind of support service that has a duration, a start date, an end date, and coverage terms can be defined as a service program. Examples include extended warranties, telephone support, coverage of labor and material for field repairs or depot repairs, preventive maintenance coverage, etc.

---

## Pricing Service Programs

Use the Price Lists window in Oracle Order Entry/Shipping to define prices for your service programs. You may define a service program price as amount-based or percent-based.

### **Amount-Based Prices**

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Oracle Order Entry/Shipping prices an amount-based service program in exactly the same way that it does any other item you enter on an order. You define and apply a discount to a service program the same way you do for any other order line.

**Note:** Oracle Order Entry/Shipping can apply order-level price adjustments to service order lines differently from how it adjusts prices of non-service order lines.

## Percent-Based Prices

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You may define the price of a service program to be a percent of the list price of the product which receives service. You use the Price Lists form to define the price of the service program. In this case, you specify a percent for the price, not an amount.

When you enter an order for a service program, Oracle Order Entry/Shipping prices the service program based on the *list* price of the associated product order line.

Example: You have a service program named 24-hour Service. Your business practice is to charge 20% of the price of a product for this service. For this case, you define an entry in the appropriate price list for the 24-hour Service item with a value of 20 in the Percent field. You enter a sales order for a serviceable product whose list price is \$100.00. When you order 24-hour Service for the product, Oracle Order Entry/Shipping calculates the list price of the service program to be \$20.00 (that is, 20% of \$100.00).

You apply price adjustments to a service program with a percent-based price the same way you do for any other order line. Oracle Order Entry/Shipping uses the calculated list price of a service program as a basis for any adjustments. In the example above, the list price of the service program is \$20.00, so if you apply a 10% discount to this service program, the selling price is \$18.00 (that is, 10% off of \$20.00).

## See Also

Overview of Pricing, *Oracle Order Entry/Shipping User's Guide*

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## Defining Service Programs

To define a service program, you must:

- Define Coverage – Each service program needs to be defined in terms of what time frame, days and hours, it will cover the customer product as well as the maximum coverage in terms of labor, material, and expenses. See: *Setting Up Service Coverages*: page 0 – 27.
- Define Item – A service program is an item defined as a non-warranty service in Inventory. See: *Defining Items*, *Oracle Inventory User's Guide*.

When defining the inventory attributes, make sure that the item attribute control level for the attributes *Support Service* and *Serviceable Product* is set at the Master level. This will ensure consistency in the definition of support services and service programs.

- Define Availability – You may want to restrict the availability of the service program to a particular customer or product, or exclude a customer or product from being associated with that service program. By default, a service program can be applied to any serviceable product or customer unless you choose to limit its availability. See: *Setting Up Service Availability*: page 0 – 28.

► **To define a service program:**

1. Navigate to the Master Items window in Oracle Inventory.
2. Enter the service program as an item.

**Note:** Select a time unit of measure for the service program. Be sure to make each service program orderable in Order Entry. Service programs should not be transactable in Inventory.

The following item attributes **can** apply to service programs:

- Invoiceable Item
- Order Entry Transactable Item
- Internal Ordered Item
- Purchased item
- Purchasable item

The following item attributes **cannot** apply to service programs:

- Inventory Item
  - Serviceable Product item
  - Stockable, Transactable, Build-in-WIP item
  - Cycle Count enabled item
  - Shippable item
  - Returnable (Order Entry attribute) item
  - Check ATP item
  - BOM Allowed item
3. Select the Service alternative region. Check the Support Service check box. Select the coverage and duration.

4. Save your work.

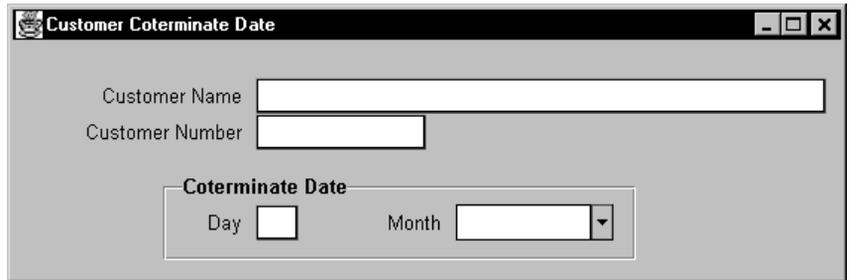
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## Defining Cotermination Dates

You can use Oracle Service's cotermination feature to set the same end date for all service programs sold to a particular customer or grouped into a particular system.

► **To define a coterminate date for a customer:**

1. Navigate to the Customer Coterminate Date window.



The screenshot shows a window titled "Customer Coterminate Date". Inside the window, there are two text input fields: "Customer Name" and "Customer Number". Below these fields is a section titled "Coterminate Date" which contains a "Day" input field and a "Month" dropdown menu.

2. Choose a Customer Name.  
**Note:** You can only choose an active customer name.
3. Enter a Coterminate Day and Month.
4. Save your work.

## See Also

Defining Systems: page 3 – 50

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## Warranties

A warranty represents a support service that is always included with a given serviceable product. The price of a warranty is assumed to be included in the price of the serviceable product, and is therefore not separately priced. Like service programs, each warranty has a duration, a start date, an end date, and coverage terms. However, unlike service programs, warranties are not selected during the order

entry process. Rather, they are included automatically with the serviceable product.

---

## Defining Warranties

Oracle Service treats a warranty as a component in the serviceable product's bill of material. To define a warranty, you first create it as an item in Oracle Inventory, then add it to the bill of material of a particular serviceable product using Oracle Bills of Material.

When defining the inventory attributes, make sure that the item attribute control level for the attributes *Support Service* and *Serviceable Product* is set at the Master level. This will ensure consistency in the definition of support services and service programs.

► **To define a warranty:**

1. Navigate to the Master Items window in Oracle Inventory.
2. Enter the warranty as an item and include a description.

**Note:** Select a time unit of measure for the warranty. Warranties should not be transactable in Inventory.

The following item attributes **can** apply to warranties:

- Internal Ordered Item
- Purchased item
- Purchasable item
- BOM Allowed item

If the Support Service is a warranty, then it can be a BOM Allowed item. If it is a service program, it cannot be a BOM Allowed item.

The following item attributes **cannot** apply to warranties:

- Inventory Item
- Serviceable Product item
- Stockable, Transactable, Build-in-WIP item
- Cycle Count enabled item
- Shippable item
- Returnable (Order Entry attribute) item

– Check ATP item

3. Navigate to the Service attribute group and check the Support Service and Warranty check boxes, then select the coverage and duration.
4. Save your work.
5. Select Organizational Assignment from the Special menu and enable the support service in all organizations in which it will be used. Keep in mind that the organizations in which a warranty has to be enabled include the following:
  - Inventory organization in which all customer products that are covered by that warranty are manufactured
  - Inventory organization in which all customer products that are covered by that warranty are repaired
  - Any other organization where the warranty is used for any other purpose

Keep in mind that the organizations in which a service program has to be enabled include the following:

- Order Entry item validation organization from which all customer products covered by that service program are shipped
  - Inventory organization in which all customer products that are covered by that service program are repaired
  - Any other organization where the service program is used for any other purpose
6. Save your work.

► **To add a warranty to a bill of material:**

1. Navigate to the Bills of Material window in Oracle Bills of Material.
2. Enter the serviceable product to which you want to add a warranty. You must enter the primary bill for the item.
3. Navigate to the Main alternative region, then enter the warranty item as a component.
4. Save your work.

You can also enter effectivity dates in the Effectivity alternate region. This will enable you to limit the availability of the warranty with the product to a specified duration. If you wish to eliminate the warranty at any time, you can put in an end date for the

warranty component. Normally, the quantity field for the warranty component should be one. You can use any values you wish for the item sequence and operation sequence fields.

You can add more than one warranty to the BOM. All warranties entered are effective for the product. For example, for a car you can define a powertrain warranty and a paint warranty. Both of these warranties can then be attached to the car's Bill of Material. When a car is sold, the customer product in the installed base will have two warranties attached.

## **See Also**

Creating a Bill of Material, *Oracle Bills of Material User's Guide*

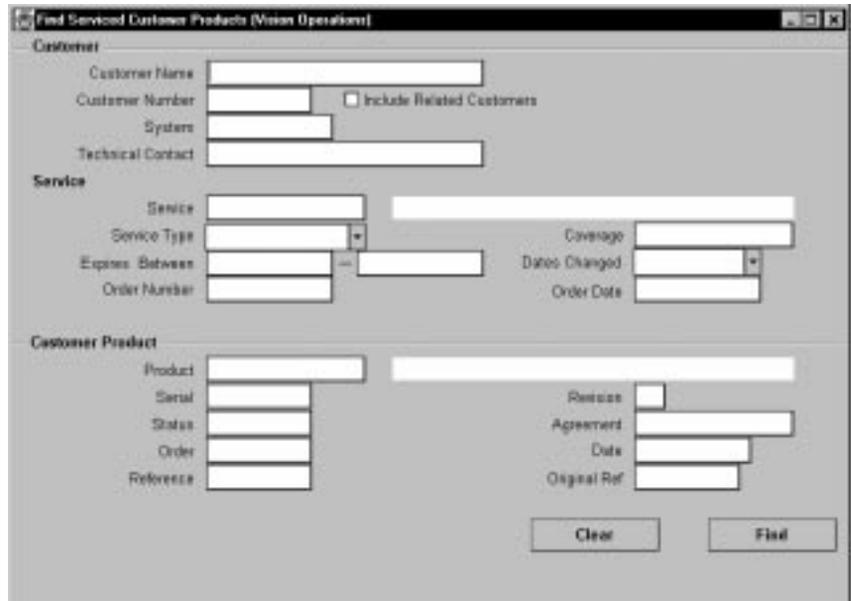
## Viewing Support Services for Customer Products

You can view all ordered, renewed, and terminated service programs and warranties for a customer product.

► **To view customer product service transaction details:**

1. Navigate to the Customer Product Services window.

The Find Serviced Customer Products window appears.



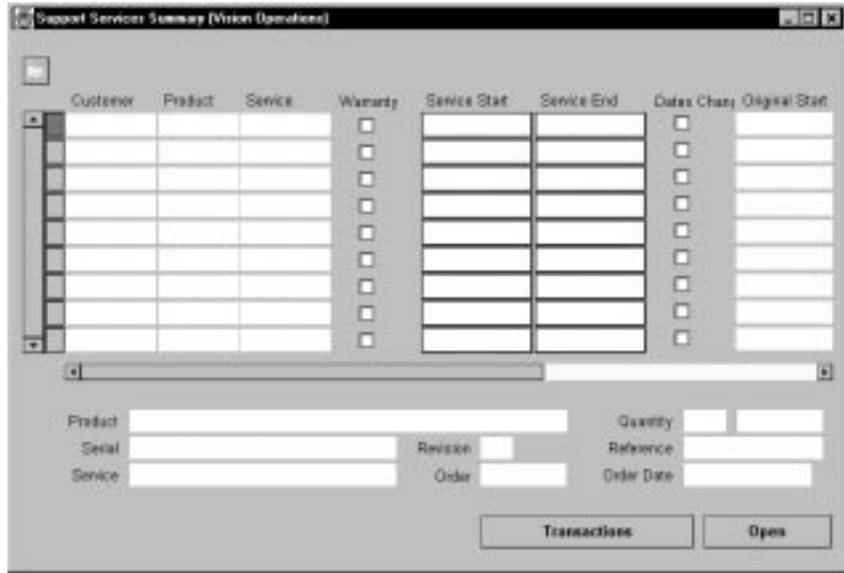
The screenshot shows a software window titled "Find Serviced Customer Products (Voice Operators)". The window is organized into three main sections: "Customer", "Service", and "Customer Product". Each section contains several input fields for search criteria. The "Customer" section includes fields for "Customer Name", "Customer Number", "Systems", and "Technical Contact", along with an "Include Related Customers" checkbox. The "Service" section includes fields for "Service", "Service Type", "Expires Between", "Order Number", "Coverage", "Dates Changed", and "Order Date". The "Customer Product" section includes fields for "Product", "Serial", "Status", "Order", "Reference", "Revision", "Agreement", "Date", and "Original Ref". At the bottom right of the window, there are two buttons: "Clear" and "Find".

2. Enter or choose information from one of the available fields to find the record to view or modify.

You can narrow your search by entering data pertinent to your customer; for example, choose a Customer, Product, Serial, Revision, or Service. A configuration of this nature reduces the number of records that are displayed

3. Choose Find.

The Support Services Summary window appears.



4. Select the record to view, then choose Transactions to view the transaction history.
5. Optionally choose Details for additional transaction information.

► **To view customer product service details:**

1. Navigate to the Customer Product Services window.  
The Find Serviced Customer Products window appears.
2. Enter or choose information from one of the available fields to find the record to view or modify.
3. Choose Find.
4. Select the record to view, then choose Open.  
The Support Services window appears.

The screenshot shows a window titled "Support Services". It contains several input fields and a button. At the top, there are fields for "Customer", "Service", "Product", and a checkbox for "Warranty". Below these is a "Service Attributes" dropdown menu. Underneath is an "Effective Dates" section with "Current" and "Original" date ranges, each consisting of two input boxes separated by a hyphen, and a "Dates Changed" checkbox. At the bottom, there are fields for "Service Order", "Selling Price", "Order Date", and "Total Amount". A "Transactions" button is located in the bottom right corner.

5. Choose the Transactions button or navigate to one of the following alternative regions to view additional information:
- Service Attributes
  - Current Transaction
  - Billing Information
  - Service Coverage
  - Serviced Product Attributes

---

## Modifying Support Service Duration

You can change the start and end dates for service programs applied to customer products in the installed base if your value for the profile option *Service: Allow Service Date Change* is Yes.

When you enter or update the installation date of a customer product, Oracle Service displays a message asking you whether you want to reset the warranty start date (if there is a warranty for the customer product) to the new installation date. The warranty end date is also calculated based on the new start date. Oracle Service retains the values of the original start and end dates, and flags all service programs that have been manually changed.

► **To change start and end dates for support services:**

1. Navigate to the Customer Product Services window.  
The Find Serviced Customer Products window appears.
2. Enter or choose information from one of the available fields to find the record to view or modify.
3. Choose Find.
4. Select the record to view, then choose Open.
5. Change the start and/or end dates.
6. Save your work.

---

## Ordering Service Programs with Product Orders

The Services window of the Sales Order form in Oracle Order Entry/Shipping enables you to select service programs to apply to serviceable products. After creating a sales order line for a serviceable product, you can navigate to this window by selecting Service Lines from the Special menu. In the Services window, you can select pricing attributes for the services program and enter start and end dates, discounts, agreements, payment terms, and commitments.

---

## Service Programs for Models and Options

You can add a service program to apply to all selected options of a configuration model even if the model item itself is not defined as a serviceable product. Order Entry/Shipping automatically propagates the service program to all serviceable options of the configuration.

Order Entry/Shipping enables you to:

- enter service for all serviceable options in a configuration at once.

When you enter duration-related information to the service order line, Order Entry/Shipping automatically applies those changes to the associated service order lines in the configuration.

- enter price adjustments and sales credits for all service order lines in a configuration at once.

When you apply changes to the price adjustments and sales credits, Order Entry/Shipping automatically applies those changes to the associated service order lines in the configuration.

- apply and release holds on all service order lines.

Order Entry/Shipping uses the *OE: Apply Order Adjustments to Service Lines* profile to control whether order-level discounts you place for an order should apply to service order lines associated with product order lines. If you do not specify a value for this profile, Order Entry/Shipping does not apply order-level discounts to service order lines.

---

## Service Duration

Order Entry/Shipping requires you to specify the duration of service on a service order line. You may specify the duration several ways:

- by entering the duration

Order Entry/Shipping does not set either the start date or the end date.

**Note:** We recommend you use this method of specifying the duration when the service program must be active for a specific length of time, regardless of when the service program actually activates.

- by entering start and end dates

Order Entry/Shipping automatically calculates the duration of the service based on the period you enter on the service order line.

For example, if you enter start and end dates of 01-JAN-98 and 31-DEC-98, respectively, and you specify a period of Month, Oracle Order Entry automatically sets the duration to 12.

**Note:** We recommend you use this method if you or your customer dictate the specific start and end dates of the service program. Also note that Oracle Service does not adjust the start date to coincide with the shipment of an associated product.

- by entering start date and duration or end date and duration

Order Entry/Shipping automatically calculates the start date or the end date (whichever you omit) from the date, duration, and period you specify.

**Note:** We recommend you use this method if you or your customer dictate the specific start and/or end dates of the service program. Also note that Oracle Service adjusts the warranty start date to coincide with the shipment of an associated product. The end date does not change.

If Oracle Service adjusts the start date of a service program based on the shipment of an associated product, the actual duration of a service program can be different from what you specify when entering the service order line. You may optionally specify a service starting delay in days when you define a serviceable product. Oracle Service automatically delays the start of the service based on the shipment date. For example, if you specify a service starting delay of ten days and ship a product, the service for the product starts ten days from the shipment date.

You can choose to coterminate service programs that you order so that the program ends at the same time as other service programs for other products associated with the same customer or system. If you set the cotermination attribute of a service order line, Order Entry/Shipping automatically sets the service program's end date to the cotermination date of the system or customer. If none is found, the end date is set such that the duration is one year.

---

## **Service Activation**

The activation duration of a service program depends on how you specify duration on a service order line.

If you specify the start or end date and duration of the service program, the service program will begin on the specified start date.

If you specify only the duration of a service program while entering a sales order, the service program start date will be equal to the shipment date plus the service starting delay. The end date will be the start date plus the duration.

## Ordering Service Programs with Products

► **To order service programs with products on sales orders:**

1. Navigate to the Sales Orders window.

**Note:** You can also order service from the Options window or the Shipments window. From the Shipments window you can navigate to the Services window either directly or via the Options window.

2. Query the order to which you want to apply a service program.
3. Select a line for service application.

**Note:** The item you choose must be defined as a serviceable product unless it is a model.

4. Select Service Lines from the Special menu to navigate to the Services window.

The screenshot shows the 'Services (Miscellaneous)' window. At the top, there are fields for 'Line', 'Item', 'Ordered Qty', 'Serviceable Amount', 'Configuration Service Total', and 'Line Service Total'. Below these is a 'Pricing' dropdown menu. The main area contains a table with columns: 'Number', 'Service', 'Attributes', 'Coterminate', 'Effective Dates' (subdivided into 'From', 'To', 'Duration', 'Period'). Below the table are fields for 'Service Description', 'Annual Selling %', and 'Extended Price'. A 'Discounts' button is located at the bottom right.

5. Select the service program to order for the serviceable product.
6. Optionally specify pricing attributes.
7. Optionally choose to coterminate the service. See: Cotermination: page 4 – 8.
8. Optionally enter an effective date range for the service.
9. Enter a numeric value for the Duration.

10. Enter a Period.

Period is the unit of measure for the service program. An example of a period would be a year. If you enter a start date, duration, and period, then the end date is automatically calculated.

**Note:** Period and Duration are required fields.

11. Optionally choose an Agreement, Commitment, and Payment Terms for the service program.

The Agreement field represents the business terms for the sales order. You can assign discounts to an agreement that are automatically assigned. The Commitment field is the contractual guarantee with a customer for future purchases; usually with deposits or prepayments.

12. Optionally enter a manual discount, depending on your value for the profile option *OE: Discounting Privilege*.

13. Save your work.

If you are applying a service program to a configuration, the Configuration Service Total field displays the sum of the extended selling prices of all services attached to the model at any level. This sum is the same for a particular model regardless of whether you are viewing a line-level, option-level, or shipment-level service.

The Line Service Total field displays the sum of the extended selling prices for all services at that level (shown in the Services window). This sum may vary depending on the level at which the service is attached.

---

## Ordering Service Programs after the Product Sale

You can create service-only sales orders for service programs to apply to customer products in the installed base. For example, if your customer wishes to purchase a service program for extended service coverage after the product's warranty has expired, you can select the particular customer product from the installed base and automatically create a sales order for the new service program. After Oracle Service creates the sales order, you can book and process the sales order in Oracle Order Entry/Shipping.

When you order a new service program for a customer product, Oracle Service uses the Order Import program in Order Entry/Shipping to create the sales order. After you book the sales order, the Service Interface passes information to Oracle Service, and the Autocreate Installed Base program adds information about the new service program and the new sales order to the installed base.

---

### Order Type

You can set the profile option *Service:Default Order Type for Service Orders* if you want to set the default order type for service-only sales orders.

---

### Service Cotermination

You can use the Coterminate check box to end the service program at the same time as other service programs for the same customer or system.

---

### On-line Creation of Service Orders

You can set the profile option *Service: On-line Processing of Sales Orders* to Yes if you want to generate a sales order on-line. If this profile is set to No, a request is submitted to run OrderImport concurrently.

- ▶ **To order a service program after the product sale:**
  1. Navigate to the Order Service Programs window.

2. Select a customer Name.
3. Choose a Service.
4. Choose a service Start and End Date.

If you enter start date, duration, and period, the end date will be calculated. If you specify the start date and end date, the duration is calculated based on your setting for the profile option *Service:Day Unit of Measure*.

5. Optionally check Coterminate to set the end date for this service program to the customer or system cotermination date. See Cotermination: page 4 – 8.
6. To add the service as a new order, choose New Order then select an Order Type, Price List, and PO Num, and optionally any pricing attributes.
7. To add the service to an existing sales order, choose Add to Order.

**Note:** Service-only orders are sales orders that have been created by Oracle Service and imported into the Order Entry system using Order Import.

Select an order number that is an existing open service-only sales order. The Order Type, Order Date, and PO Num default from the entered order.

8. Save your work.
9. Choose Customer Products.

The Find Customer Products window appears.

Order Service Program: Find Customer Products [Nizan Operations]

**Customer**

Name

Number

Include Related Customers

**Order**

Number

Date

**Product**

Product

Serial

Reference

Original Ref

Revision

System

Agreement

PO Number

Clear Find

10. Enter or select information from one of the available fields to find the record, then choose Find.

Order Service Program: Customer Products

Filtering

Columnize

Service	Columize	Service Dates		Duration	Period
		Start	End		
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="checkbox"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

Service Desc:

Product Desc:

Status:

Order:  Order Date:

Add To Order:  PO Num:

Serviced:  Qty:  Rev:

Eligible for Service

Install Date:

Submit

11. Choose the products for which to order service.

The start and end dates are defaulted from the start and end dates that you chose in the Order Service Programs window. You can optionally change the data for any or all of the products that you select. Changing the field values in this window recalculates the service's price.

12. Choose Submit to import the information into the Order Entry system.

**Note:** Choosing Submit creates a sales order *immediately* after confirming your choice. The Eligible for Service check box is checked if the Service is available to be ordered for the customer product.

## **See Also**

Agreements: page 3 – 16

Cotermination: page 4 – 8

Setting Up Service Availability: page 0 – 28

---

## Renewing Service Programs

You can renew a product's service program. Renewing service implies that you are extending a service program currently in place. The starting date of renewed service is the current service's end date plus one day, thereby continuing the renewed service without an interruption. If a service program is renewed *after* expiration of the former service, the renewal service program is assigned a start date of the former service's end date plus one day, continuing the service uninterrupted.

A company, for example, may have dozens of photocopier machines at multiple locations across the company. As new machines are added, each receives a new service program that is renewed as it expires. As the company grows, dealing with the numerous renewal dates becomes a burden. Since these machines are not a part of a system, the company chooses to coterminate the photocopier service program at the customer level. Each service program coterminates on the same day and month allowing for easy service program renewal on all photocopier machines.

You can add the renew service order to an existing open service-only sales order, or create a new sales order and fill in the appropriate sales order information including order type, price list, PO Number, and pricing attributes. Use the predefined order type value determined by the profile option *Service:Default Order Type for Service Renewals* while creating a sales order in the Renew Service window. An order type is defined as a classification of an order. In Order Entry/Shipping, order type controls order cycle, order numbering source, the point in the cycle to credit check, transaction type, standard value rule set and the navigation preference set of an order.

When you renew a service program, Oracle Service uses the Order Import program in Oracle Order Entry to create the sales order. After you book the sales order, the Installed Base Interface copies information about the renewal of the service program to the installed base.

### See Also

Agreements: page 3 – 16

Cotermination: page 4 – 8

Ordering Service Programs after the Product Sale: page 4 – 26

► **To renew service programs:**

1. Navigate to the Renew Service Programs window.

The screenshot shows the 'Renew Service Programs (Vision Operations)' window. It is organized into several panels:

- Customer:** Fields for Name, Number, Bill To, and Ship To.
- Service Details:** Agreement field and a Coterminate checkbox.
- New Order:** Radio button selected, with fields for Order Type, Price List, and PO Num.
- Add to Order:** Radio button unselected, with fields for Order Num, Order Type, Order Date, and PO Num.
- Renewal:** Radio buttons for 'Until' (selected) and 'Duration'. Fields for Renew, Reason, Period, and another Period field. A 'Customer Products' button is at the bottom right.

2. Choose a customer Name.
3. Optionally choose an agreement.

An agreement is an arrangement with a customer that sets the business terms for sales orders in advance. See *Agreements*: page 3 – 16.
4. Optionally check Coterminate to end all services for this customer at the same specified date. See *Cotermination*: page 4 – 8.
5. To add the service as a new order, choose New Order, then select an Order Type, Price List, and optionally PO Num.
6. To add the service to an existing sales order, choose Add to Order, then select an order number that is an existing open service-only sales order.

The Order Type, Order Date, and PO Num are defaulted from the entered order.

**Note:** Service-only orders are sales orders that have been created by Oracle Service and imported into the Order Entry system using Order Import.
7. Choose a Renewal Option.

If you choose Until, the associated date must be greater than the end date of the current service. Choose a period, such as Month. If you choose Duration, enter a numeric time frame value such as 1 for 1 month.

8. Choose a reason code.

**Note:** A reason code explains the purpose of the service renewal. Examples of a reason code are yearly renewal, early renewal, or expired service.

9. Choose the Customer Products button.

The Find Customer Products window appears.

The screenshot shows a window titled "Renew Service Program: Find Customer Products". It contains several input fields organized into sections:

- Customer:** Name, Number, and a checkbox labeled "Include Related Customers".
- Order:** Number and Date.
- Service:** Service.
- Product:** Product, Serial, Reference, Original Ref, Revision, System, Agreement, and PO Number.

At the bottom right of the window, there are two buttons: "Clear" and "Find".

10. Optionally enter Order Number, Order Date, Product, Serial, Reference, Original Ref, Revision, System, or Agreement to further define the search.

11. Choose Find.

The Customer Products window appears.

The screenshot shows a software window titled "Renew Service Program: Customer Products". At the top, there is a dropdown menu labeled "Installed Base". Below this is a table with four columns: "Service", "Pricing Attributes", "Selling Price", and "Extended Price". The table has several empty rows. To the left of the table is a vertical list of checkboxes. Below the table, there are several input fields: "Service Desc", "Product", "Product Order", "PO Number", and "Add To Order" on the left; "Rev", "Status", "Qty", and "Service Order" on the right. A "Submit" button is located at the bottom right of the window.

12. Choose the service for renewal. The new end date is automatically calculated based on the renewal option.

The start date, end date, service, New End Date, Duration Period, Coterminate flag, and Agreement are defaulted from the Renew Service Programs window. These values can be changed optionally. You can enter pricing attributes as another option. Changing any field value recalculates the selling price and extended price.

13. Select the new end date for the renewal service.

**Note:** The New End Date must be greater than the Current End date.

14. Choose Submit to save your work.

**Note:** Choosing Submit creates a sales order *immediately* after confirming your choice.

---

## Terminating Service Programs

You can terminate service programs for customer products at any point during the life of a service program. If you are terminating service on only a portion of the customer product, you can use split customer products to isolate the quantity specified for service termination. After terminating service, the transaction is recorded for audit history, making it available for future review. If a product with a service assigned is cancelled, it is necessary to navigate to the Terminate Service window to cancel the associated service program. Cancelling a customer product does *not* automatically terminate the associated service program.

For example, a company has current service programs on six anneal ovens used to set the paint of fabricated aluminum machined parts. The ovens are old and take a long time to heat. New ovens would cut the heating time in half and increase production. Terminate service is used to end the current service programs on the old ovens as the new ones are installed.

When you terminate a service program, Oracle Service automatically uses the Receivables Interface to account for credit against the terminated service for invoiced transactions. Afterwards, run the AutoInvoice program to generate credit memos.

While interfacing with Oracle Receivables to raise credit memos, Oracle Service uses the following rules. If the accounting rule for the original invoice for the service is IMMEDIATE, then the credit method for crediting the transaction is NULL and the invoicing rule is NULL. If the accounting rule is not IMMEDIATE, then the credit method for crediting the transaction is UNIT and the invoicing rule is the rule from the original sales order for the service being terminated.

**Note:** Credit memos will be generated only for service programs that have been invoiced. The Terminate Service program skips all uninvoiced services.

### See Also

Setting Up Termination Reasons: page 0 – 31

► **To terminate service programs:**

1. Navigate to the Terminate Service window.

The Terminate Service: Find Customer Products window appears.

The screenshot shows a software window titled "Terminate Service: Find Customer Products (Vision Operations)". It contains several input fields organized into sections:

- Customer:** Fields for "Customer Number" and a checkbox labeled "Include Related".
- Order / Installation:** Fields for "Order", "Date", "Installed At", and "Contact".
- Service:** Fields for "Service", "Status", "Order", "Start Date", "End Date", "Agreement", and "Order Date".
- Product:** Fields for "Product", "Serial", "Reference", "Original Ref", "Revision", "System", "Agreement", "Status", and "PO Number".

At the bottom right of the window, there are two buttons: "Clear" and "Find".

2. Enter or choose information from one of the available fields to find the record to terminate.

You can narrow your search by entering data pertinent to your customer for example, choose a Customer, Product, Serial, Revision, or Service. A configuration of this nature reduces the number of records that are displayed.

3. Choose Find.

The Terminate Service: Serviced Customer Products window appears.

**Terminate Service/Service Customer Products**

**Termination Information**  
 Terminate Date:

**Services**

	Effective Date	Credit		Current		Service
		Amount	%	Start	End	
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

**Service Desc:**  **Status:**   
**Customer:**  **System:**   
**Product:**  **Rev:**   
**Serial:**  **Reference:**  **Qty:**   
**PO Number:**  **Product Order:**  **Service Order:**

**Terminate Reason**  
 Reason:

- Choose Terminate Date to enter the default date of termination; it can be changed if necessary. The form displays the system date as the default.

**Note:** If you are terminating a service that has a future start date, the Terminate Date must fall between the start and end dates of the future service.

- Choose a service to terminate.
- Choose Effective Date to enter the date termination is effective, or accept the default termination date (system date).
- Optionally, adjust either the Credit Amount or the Credit Percentage.

**Note:** If you do not want to credit your customer, enter \$0 in the Credit Amount field.

When you set either a new credit amount or credit percentage, the other field automatically reflects the change. For example, if you terminate a service with a future start date that has a value of \$100.00, you see a credit amount of \$100.00 and a percentage of 100%. If you change the monetary credit to any lesser amount, the percentage automatically changes to reflect the monetary change, or vice versa.

- Choose a Reason for service termination.

A Terminate Reason is the brief code explaining the need to terminate the service program.

9. Choose Terminate to end the customer product service and save your work.

**Note:** After choosing Terminate, you are warned that the transaction is irreversible, and are asked to confirm your choice to terminate.

10. Optionally choose the Transactions button to view the customer product service transaction history.

**Note:** You must run the Service Termination and Auto Invoice programs to raise a credit memo in Oracle Receivables. If the original sales order for the service has not been invoiced, the Service Termination program does not process your transaction.

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## Canceling Service Order Lines

You may cancel a service order line as long as Order Entry/Shipping has not interfaced it to Oracle Service. Once Order Entry/Shipping interfaces a service order line to Oracle Service, you must use Oracle Service's Terminate Service functionality to cancel any unused service.

If you cancel a product order line which has an associated service order line, Order Entry/Shipping automatically cancels the appropriate quantity of the service order line.



# Service Requests

**W**hen your customers call with questions or problems, you can track each call using Oracle Service's service requests. You automatically build your solutions knowledge base by channeling information you collect while responding to service requests.

This chapter provides you with detailed information about the following:

- Overview of Service Requests: page 5 – 3
- Caller Identification: page 5 – 6
- Product Identification: page 5 – 6
- On-line Service Verification: page 5 – 7
- Setting up Service Requests: page 5 – 7
- Service Request Defaults: page 5 – 9
- Linking Service Requests: page 5 – 9
- Return Material Authorizations (RMAs): page 5 – 10
- Defining Items for Return: page 5 – 10
- Entering Service Requests: page 5 – 12
- Entering Service Request Details: page 5 – 16
- Service Request Updating: page 5 – 20
- Service Requests Special Menu: page 5 – 21

- Searching the Knowledge Base: page 5 – 22
- Entering Comments: page 5 – 25
- Creating Messages: page 5 – 27
- Viewing and Responding to Messages: page 5 – 28
- Viewing Message History: page 5 – 29
- Tracking Inbound and Outbound Calls: page 5 – 31
- Viewing Service Request Audit History: page 5 – 33
- Creating Service Request Links: page 5 – 34
- Entering Service Request Actions: page 5 – 35
- Service Request Action Updating: page 5 – 36
- Viewing Action Audit History: page 5 – 37
- Viewing and Updating Service Requests: page 5 – 39

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## Overview of Service Requests

Most service calls begin with a telephone call from a customer who is experiencing difficulties using the product, understanding the product, or with the functioning of the product. The Oracle Service *Service Requests* module categorizes each customer request for service into user-definable service request *types* such as product complaints, field failures, or product inquiries. Service requests are not limited to functioning customer products, since you can log requests for non-product issues such as clarification of documentation, resolution of implementation issues, and product upgrade information.

A service request describes all the necessary information about the customer problem to determine the best plan of action to resolve the issue effectively. The installed base contains information about the customer, customer site, and the installed customer product. With direct linkages to the installed base, you are able to verify customer and product information. You can verify the current service coverage for a customer product or system. If the customer is unknown to the installed base, all the information can be collected in a non-verify mode and then verified later.

While logging service requests, you can assign an urgency and severity status for each request. An urgency reflects the service request from the caller's view of the event, while the severity reflects the service person's interpretation of the event. Setting these attributes allows a timely resolution for each service request.

In the Service Request setup forms, you can fully define your service requests by Type, Status, Urgency, Severity, Problem, and Resolution codes. You can also define Call and Follow-up codes to qualify the calls you receive. Each code serves to refine the definition of the service request and aids in problem trend analysis and resolution.

If your customer service center handles a large volume of calls, you can automate your call center by leveraging Oracle Service's integration with computer telephony software. Based on call characteristics, you can direct the call to an appropriate agent, who can access information entered by the customer before picking up the phone.

More than eighty percent of the calls coming into a customer service center involve problems that have already been resolved. Oracle Service therefore creates a knowledge base of previously reported problems and their resolutions. As new service requests are logged, service personnel may search this knowledge base to identify solutions that have worked in the past. They can then provide a solution to the customer while logging the new service request.

Once they are logged, you can route these service requests to individuals in your organization and move them through a workflow-based resolution process tailored to your own unique business requirements. Using Oracle Workflow, you can implement procedures that not only select and notify service personnel, but also transfer and escalate service requests automatically.

You can define business rules to identify service requests that violate your service standards or response guidelines, and then automatically take corrective actions or escalate those requests to the appropriate person. Based on parameters such as call type, a service request can follow a resolution process optimized for that situation. You can analyze the exact routing of each service request to identify and eliminate the bottlenecks in your service request resolution process.

Service requests can have an unlimited number of actions to represent what has been done to resolve the service request. For each action you can specify an assignee, a status, a user-defined action type, start and end dates and times, and free-form text describing the problem and resolution. Additionally, you can route each action through a separate workflow-based resolution process analogous to the workflow process used for service requests.

You can link related service requests. For example, if two or more problems are reported in the same customer call, you can create a service request for each and link them together.

You can also set up collection plans in Oracle Quality that capture relevant data as service requests are logged by customer service personnel. Collection plans may capture data related to a customer, product, product line, etc. You can then analyze this data in Oracle Quality to answer queries such as the most common problems faced by users, or products that cause the most problems. You can also export the captured data to other tools to perform detailed statistical analyses.

You can record all customer interaction for each service request by logging all incoming and outgoing calls as well as associated details. Oracle Service logs a call automatically whenever you create a new service request and whenever a customer enters or updates a request via Oracle Self-ServiceWeb Applications. Later, you can log additional calls as the customer makes them.

As you change information about service requests and actions, Oracle Service maintains an audit history of the changes. For example, if you change the status of a service request from Open: Unassigned to Open: Assigned, Oracle Service records the old and new status values, as well as the user who made the change and the date.

The Service Request module is integrated with the return material authorization (RMA) module in Oracle Order Entry/Shipping. You can indicate that a particular service request involves a return, then access the Returns window directly from the Service Requests window. The RMA that you create will be linked to the service request.

While resolving a service request, you can log all labor, material, and expenses incurred in processing the service request. Once the request has been resolved, you can discount charges to the customer by the amount covered by an appropriate support service, then bill the customer for charges not covered by a support program.

The Service Request module helps you manage customer requests for service in the following ways:

- Record customer information quickly
- Define the customer's request for service
- Define service request status, types, severities, and urgency
- Verify service programs or warranties on line
- Confirm customer information; name, number service coverage, product, system, or serial number
- Provide an audit trail of service request changes
- Assign problem and resolution codes to each service request
- Define service request and product linkage
- Display each service request in summary or detail format
- Link service requests
- Search a knowledge base to resolve and expedite service requests
- Use Oracle Workflow to route the service request through the organization
- Use Oracle Quality to collect quality control information linked to service requests
- Enter calls made by or to customers, or by employees
- View calls and comments for a service request all at once
- Based on the service request, launch a service request or service request action workflow

## See Also

Entering Service Requests: page 5 – 12

Service Requests Special Menu: page 5 – 21

Overview of Service Billing: page 8 – 2

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## Caller Identification

Customers reporting a service request have several ways to identify themselves: customer name, customer number, or contact name. Based upon this identification you can determine the appropriate validation of customer products, service programs, or warranties.

While entering a service request, if you select Verify Request, then the customer and contact name you enter must exist in the shared customer and contact master. If you have not defined the customer yet (for example, you sell to a distributor who in turn sells to the end customer), then you can select Do Not Verify Request and enter a new customer name and address. Later, after you add the new customer name and address to the customer master, you can change the service request to Verify Request. Optionally, you can use the Customers window to add new customer information to the customer master. You can then continue to log the service request in verified mode.

You can track service requests from customers as well as those from employees in your organization. Employee requests are verified records that include the employee's name and employee number from the employee master.

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## Product Identification

You can optionally enter product information for each service request. If you wish to enter product information, you have the option of selecting any product defined in your Oracle Inventory item master or a customer product in the Oracle Service installed base. If you wish to select a customer product from the installed base, you can search for customer products based on any known attributes such as serial number, order number, customer PO, customer name, etc.

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## On-line Service Verification

You can verify service program and warranty coverage as you process requests for customer service. You can check to verify that appropriate service programs or warranties are in place to cover the service request, or suggest other service programs based upon established policies and procedures.

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## Setting Up Service Requests

You can define any number of service request types, statuses, urgency codes, severity codes, problem codes, or resolution codes.

### **Service Request and Action Types**

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You can define service request and action types to categorize your service requests and actions.

Following are some examples of service request types that you can create:

- Request for Information
- Customer Complaint
- Defective Product
- Installation Request
- Preventive Maintenance Visit
- Field Service
- Bug

Action types define the kinds of actions you can take for all or specific service request types. You can relate specific action types to a particular service request type. Then, as your customer service personnel process service requests of a given type, they can choose related action types.

Following is an example of a service request type and related action types that you can create:

*Service Request Type:* Customer Complaint

*Related Action Types:*

- Assignment

- Analysis
- Customer Callback
- Resolution

### **Service Request and Action Statuses**

---

You can define service request statuses to indicate the current state of reported service requests and the actions assigned to them. The service request status captures the current state of the service request, whereas action statuses reflect the current state of each of the actions related to the service request. For example, a customer calls to report a broken switch on his personal computer. You could set the service request status to Open and then create an action with the status Assigned to indicate that the service request has been assigned to a field engineer. Optionally, you could create statuses like Open: Unassigned to reflect both the state and condition of the service request.

You can relate specific statuses to a particular service request or action type. Following is an example of action types and related statuses.

<b><i>Action Types</i></b>	<b><i>Related Statuses</i></b>
Assignment	Assigned
Analysis	In Process, Done
Customer Callback	Engineer Called, Customer Called
Resolution	Closed

### **Service Request Urgency**

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A service request urgency reflects the *caller's* perception of the reported service request. Low, Medium, and High are examples of urgencies. See: Setting Up Service Request Urgencies: page 2 – 35.

### **Service Request and Action Severities**

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You can define a service request's severity and thereby set the priority. Low, Medium, and High are examples of severities. Similarly, you can also define severities for actions to indicate the priority of these actions.

### **Problem and Resolution Codes**

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A problem code gives meaning to the service request described by the caller. Problem codes isolate the detailed reason for the call. See: Setting Up Problem Codes: page 2 – 40.

A resolution code gives meaning to the resolution of the service request described by the caller. Resolution codes isolate the detailed solution for the call. See: *Setting Up Resolution Codes: page 2 – 41.*

### **Call Type and Followup Type**

---

You can categorize calls you enter by defining call types. Two examples of call types are Followup Call and Promotion Call. Similarly, by defining followup types, you can classify the type of followup required for a call. An example is Followup by Phone.

Each time a new service request is created, a call is logged with the call type Request Created. Whenever the service request is updated via Oracle Web Customers, a new call is created with the call type Request Updated. See: *Service Requests, Oracle Web Customers.*

---

## **Service Request Defaults**

Service Request default values, specified by user profiles, help you enter service requests quickly. You can set user profiles to default the following values as you enter service requests:

- Service Request Type
- Service Request Owner
- Severity
- Urgency
- Action Assignee
- Action Type
- Action Severity

You can override these defaults if necessary.

---

## **Linking Service Requests**

You can link any service request to one or more other service requests. For example, if several customers report the same problem occurring in a software product, you can link these service requests together, or link each of these service requests to the service request that contains a thorough description of the software resolution.

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## Return Material Authorizations (RMAs)

Through integration with Oracle Order Entry, service requests can create an RMA to return a defective product for repair or replacement.

Oracle Order Entry/Shipping provides sophisticated tracking of your return material authorizations. Returns from a customer occur for a variety of reasons, including damage, shipment error, or repair. Return material processing functionality allows you to manage customer expectations while controlling inventory receipts and customer credit processing.

You can associate an RMA with a service request only if the request is verified and if the Return box is checked in the Problem Description alternative region of the Service Requests window. Additionally, if the service request is logged by an employee, the customer for the request must be listed in your installed base. Associate an RMA with a service request either by selecting an RMA number in the Service Requests window or by using the Special menu to open Order Entry's Returns window.

If your service request is for a return for repair, Oracle Service automatically links the service request with the associated repair lines by way of the RMA number.

### See Also

Overview of Returns, *Oracle Order Entry/Shipping User's Guide*  
Entering Charges: page 8 – 3

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## Defining Items for Return

When defining items in Oracle Inventory, you must set the item attribute *Returnable* to Yes for an item to be returned. If you are going to receive the items in Oracle Inventory, the following attributes must also be set: *Shippable Item* = Yes, *Transactable* = Yes, and *Stockable* = Yes.

**Note:** *Transactable* is under the Inventory attribute group and is different from *OE Transactable*, which is under the Order Entry attribute group. To set the *Transactable* attribute to Yes, the *Inventory Item* attribute must be Yes. *Stockable* is also under the Inventory attribute group.

To create credits for return items in Oracle Receivables the item must have the item attributes *Returnable* = Yes and *Invoice Enabled* = Yes.

Intangible items, such as warranties or education services, should have the following item attributes: *Returnable* = Yes, *Shippable Item* = No, and *Invoice Enabled* = Yes. With these attributes, items do not interface to Oracle Inventory, but can interface to Oracle Receivables to generate billing and credits. By assigning items different attributes you can mix shippable and intangible items on the same return, using the same order cycle, without having to process intangible items in inventory.

## **See Also**

Overview of Returns, *Oracle Order Entry/Shipping User's Guide*

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## Entering Service Requests

As customers call to report a request for service, you can log complete information for quick resolution using the Service Requests window.

You can access the Find Service Requests window while entering service requests. This enables you to locate previous service requests for the customer or product. By searching through past service requests, you can identify a known problem specific to the customer or product. Using historical resolution information, you can quickly resolve the service request and satisfy the customer's needs.

The Service Requests window enables you to enter and maintain the following information:

- owner, problem summary, severity and urgency, status, and date and time
- customer and contact details
- product details
- problem description and problem code
- resolution description and resolution code
- caller location and address
- bill-to and ship-to customer locations and addresses
- charges
- customer interaction
- comments
- service request audit history
- service request links
- service request actions
- action audit history

You can enter the information in the order that the customer relates it to you. For an example, the customer may call and say his system is down and that the model is "SupaMax". You may then have to ask who is calling and where they are located.

If you want to revisit the same service request several times without having to requery it, you can place it in the Oracle Applications Navigator. When the request is open, choose Place on Navigator from the Action menu. You can then access the request directly from the

Navigator's Documents alternative region. See: Using the Navigator's Documents Region, *Oracle Applications User's Guide*.

► **To enter a service request:**

1. Navigate to the Service Requests window.

The screenshot shows the 'Service Requests' window with the following fields and controls:

- Request Type:** Text input field.
- Severity:** Text input field.
- Owner:** Text input field.
- Summary:** Text input field.
- Logged By:** Text input field.
- Status:** Text input field.
- Urgency:** Text input field.
- Request Date:** Text input field.
- Date Closed:** Text input field.
- Active Workflow:**  checkbox.
- Verify Request:**  radio button.
- Do Not Verify Request:**  radio button.
- Requested By:**  Customer,  Employee.
- Customer:** Text input field.
- Employee:** Text input field.
- Number:** Text input field.
- Contact:** Text input field.
- Phone:** Text input field.
- Fax:** Text input field.
- Email:** Text input field.
- Est:** Text input field.
- Time Lag (Hours):** Text input field.
- Represented By:** Text input field.
- Contact:** Text input field.
- Phone:** Text input field.
- Fax:** Text input field.
- Email:** Text input field.
- Est:** Text input field.
- Time Lag (Hours):** Text input field.

Buttons at the bottom: , , , , .

2. Choose a service request Type.

A Type denotes the nature of the service request. An example of a type is *repair*. You can specify a default value using the profile option *Service:Default Service Request Type*.

3. Choose a service request Status to explain the current state of the reported service request.

The default status is Open. If you define statuses related to service request types, then you can only choose a status related to the service request type you selected. See Setting Up Service Request Statuses: page 2 – 33.

If the request status is Closed (or any other user-defined status that represents closed requests), the Closed flag is toggled on. You cannot update this box directly. Instead, use the Status field.

4. Choose a service request Severity to indicate the support person's perception of the call.

You can specify a default value using the user profile *Service:Default Service Request Severity*.

5. Choose a service request Urgency to reflect the caller's perspective of the call.

You can specify a default value using the user profile *Service:Default Service Request Urgency*.

6. Select an Owner.

An owner is the person tasked to resolve the service request. Owners must exist in the employee master table. You can specify a default value using the user profile *Service:Default Service Request Owner*.

7. Note the status of the Active Workflow flag.

The Active Workflow flag is toggled on if an active workflow exists for this service request.

8. Optionally modify the status of the Publish flag.

If the Publish flag is toggled on, this service request is visible to anyone querying requests using Oracle Self-Service Web Applications. Your ability to update this flag depends on your setting for the profile option *Service:Publish Flag Update Allowed*.

9. Enter a Summary to describe the service request.

10. Choose Verify Request or Do Not Verify Request.

By choosing Do Not Verify Request, you can enter customers that do not exist in the customer master. In the non-verify mode, customer information is not validated. This allows you to enter service requests for customers that are not yet in the installed base or in the customer master. If you enter customer information in non-verify mode, you can later change the service request to verify mode after you have added the customer to the customer master. If this is an employee service request, you must choose Verify Request.

11. Save your work.

After you save the service request, you can choose Enter RMA from the Special menu to access the Returns window. This menu item is enabled only if you have checked the Return box for this request. If you associate an existing RMA with a service request, Oracle Service links the request with any repair lines that have the same RMA. You cannot change the attached RMA if the request has charge details; however, if charge details exist and you have not already associated an RMA with this request, you can do so.

## **See Also**

Entering Service Request Details: page 5 – 16

Service Requests Special Menu: page 5 – 21

# Entering Service Request Details

## Prerequisites

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- Define service request header information. See: Entering Service Requests: page 5 – 12.

### ► To enter service request caller information:

1. Navigate to the Caller alternative region in the Service Requests window.
2. Choose whether the request is being logged by a Customer or Employee.  
  
If this request is from an employee, the Verify Request flag must be toggled on, and the employee must be active in the Human Resources system.
3. Select a Customer or Employee.  
  
If you checked Verify Request, the customer you select must be in the customer master.
4. Choose a Contact, Phone, Fax, and Email.  
  
You cannot select a Contact for an employee request.
5. Optionally enter an Extension and Time Lag in hours as applicable.  
  
The Time Difference must not exceed 24 hours.
6. Optionally enter a Represented By Contact, Phone, Fax, Extension and Time Difference if applicable.  
  
The contact need not exist in the contact master. These fields are unavailable if the request is from an employee.
7. Save your work.

### ► To enter service request product information:

1. Navigate to the Product, Services alternative region in the Service Requests window.
2. Choose a Product. This field is validated against the item master.
3. Choose Installed Base or Other.  
  
If you choose Installed Base, the data you enter is validated based on installed base records. All fields are enabled. You can choose Installed Base only if you selected Verify Request. Choosing a

serial or reference number will automatically populate all the other fields in this region.

If you choose Other, the Product, Serial Number, Order Number, and PO Number fields are enabled. All other fields are disabled. This allows you to enter product information from any other service.

**Note:** If you choose Installed Base and subsequently choose Other, a message displays alerting you that by choosing Other you will clear values in the installed-base-only fields.

4. Choose a Serial Number.

If there are any current service programs or warranties for the customer product, choosing a Serial Number will automatically populate the Installed Base and Services regions. If Installed Base was selected, you can choose from a list of values; otherwise, you can enter any value.

**Note:** If Installed Base was selected, all Order Numbers and System names appear and are validated against the installed base.

5. Select a System if you chose Installed Base.

If you chose Other, this field is disabled.

6. Choose a Reference Number if you chose Installed Base.

If there any current service programs for the customer product, choosing a Reference Number will automatically populate the Installed Base and Services regions.

If you chose Other, this field is disabled.

7. Enter an Order Number to indicate the sales order of the item reported on this service request.

8. Enter a Purchase Order Number.

If you chose Installed Base, this field defaults a value if one exists

9. Save your work.

The Status field indicates the customer product's status in the installed base. The Request Allowed box indicates whether service requests can be logged against this product.

► **To find a specific customer product:**

1. In the Service Requests window, navigate to the Product, Services alternative region.

2. Choose Find Product.

The Find Customer Products window appears.

3. Enter data in the available fields to identify the customer products to view.

4. Choose OK.

All records satisfying the find criteria appears. When you select a row in the Customer Products window, the Installed Base and Service regions populate.

► **To enter a problem description:**

1. In the Service Requests window, navigate to the Problem Description alternative region.

2. Enter a detailed Description of the service request.

3. Optionally select a Problem Code for the service request.

An example of a problem code is ES, for electrical short. See: Setting Up Problem Codes: page 2 – 40.

4. Optionally enter an Expected Resolution Date.

5. Optionally check Make Public to make the problem description available to anyone querying this request using Oracle Self-Service Web Applications.

This box's status defaults from your setting for the profile option *Service:Default Make Public Flag*.

6. Save your work.

**Note:** If this request is associated with any repair lines, the In Depot box is checked. You cannot change the RMA number if this box is checked.

► **To enter a request address:**

1. Navigate to the Request Address, Detail alternative region in the Service Requests window.

**Note:** The fields in this region are for informational purposes only (with the exception of the descriptive flexfield, if you use it).

2. Select a Location.

The customer name associated with the location defaults in the Customer field. This customer need not be the customer who owns

the product. The Customer field is not available if the request is for an employee.

3. Optionally modify the customer Address.

Both the Location and Address fields are not validated, so you can enter an address that does not exist in the customer master. This allows you to enter any address that a caller provides.

4. Save your work.

**Note:** If this request was created via the Web, the Web Entry box is checked, and the total time spent on the request and its last update date display.

► **To enter a bill-to and ship-to address:**

**Note:** Nothing in this region is validated if you checked Not Verified.

1. Navigate to the Address: Bill To, Ship To alternative region in the Service Requests window.
2. Choose a Bill To Location or a Customer.
3. Choose a Bill To customer Address.
4. Choose a Bill To Contact.
5. Choose a Ship To Location or Customer.
6. Choose a Ship To Address.
7. Choose a Ship To Contact.
8. Save your work.

► **To enter a problem resolution:**

1. In the Service Requests window, navigate to the Problem Resolution alternative region.
2. Enter a detailed Problem Resolution description for the service request.
3. Optionally choose a Resolution Code for the service request.  
An example of a resolution code is RCB for replace circuit board. See Setting Up Resolution Codes: page 2 – 41.
4. Optionally check Make Public to make the problem description available to anyone querying this request using Oracle Self-Service Web Applications.

This box's status defaults from your setting for the profile option *Service:Default Make Public Flag*.

5. Save your work.

## See Also

Service Requests Special Menu: page 5 – 21

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## Service Request Updating

You cannot change the type and owner of a service request while there is an active workflow process for that service request.

If you close a service request that has an active workflow process, a warning appears asking whether you want to abort the workflow process. Choose OK to abort the workflow.

## See Also

Entering Service Requests: page 5 – 12

Entering Service Request Details: page 5 – 16

Service Request Workflow: page 9 – 4

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## Service Requests Special Menu

This section lists the available options on the Special menu for the Service Requests windows.

<b>Enter Quality Results</b>	See: Entering Quality Results for Service Requests, <i>Oracle Quality User's Guide</i>
<b>Send Message</b>	See: Creating Messages: page 5 – 27
<b>Related Service Requests</b>	See: Creating Service Request Links: page 5 – 34
<b>Enter RMA</b>	See: Overview of Returns, <i>Oracle Order Entry/Shipping User's Guide</i>
<b>Launch Request Workflow</b>	See: Service Request Workflow: page 9 – 4
<b>Abort Request Workflow</b>	See: Service Request Workflow: page 9 – 4
<b>Message History</b>	See: Viewing Message History: page 5 – 29
<b>Launch Action Workflow</b>	See: Service Request Action Workflow: page 9 – 13
<b>Abort Action Workflow</b>	See: Service Request Action Workflow: page 9 – 13
<b>Search Knowledge Base</b>	See: Searching the Knowledge Base: page 5 – 22

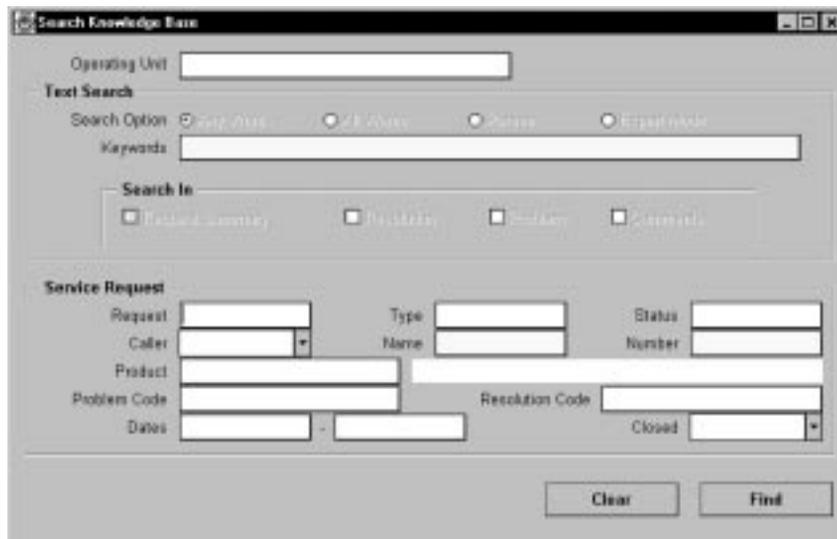
## Searching the Knowledge Base

After logging a service request from a customer or employee, you can search a knowledge base of previously logged service requests. You can perform a keyword search using the ConText server if the *Service:Enable Context Search* profile option is set to Yes. You can also specify field values and query the database. The search results enable you to view service request details that match your criteria as well as comments attached to those requests.

**Note:** You can enter criteria only in the Text Search block, only in the Service Request block, or in both blocks before choosing the Find button. The query results are limited by all the criteria you enter.

► **To search the knowledge base:**

1. Navigate to the Search Knowledge Base window.



2. Select the operating unit in which your requests were logged.  
If you do not select an operating unit, the search returns details for service requests logged in all organizations.
3. In the Text Search block, select a search option and enter keywords.  
*Any Word:* If you enter several keywords, the search results will include any records that contain any of the words.

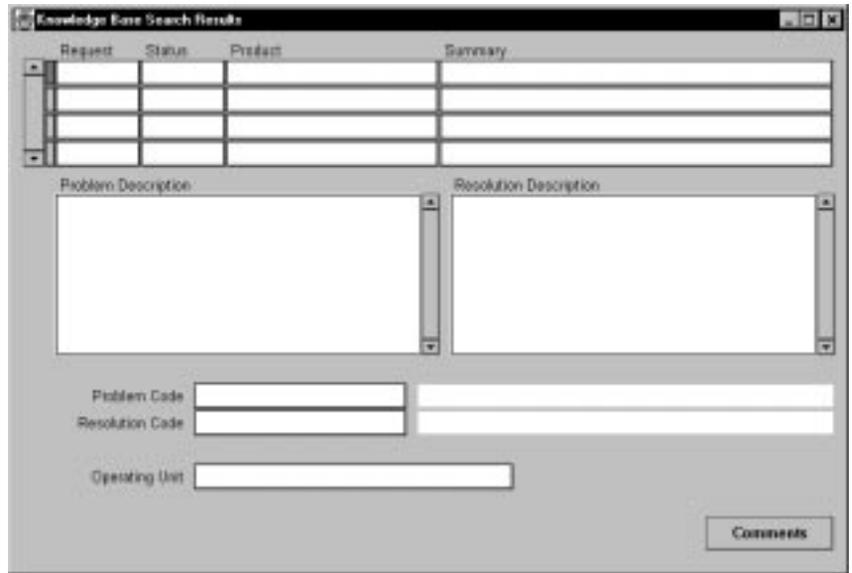
*All Words:* If you enter several keywords, the search results will include only those records that contain all of the words (in any order).

*Phrase:* If you enter several keywords, the search results will include only those records that contain all of the words in exactly the order you enter them.

*Expert Mode:* You can include ConText operands in your search.

4. Check one or more of the following to indicate where to search: Request Summary, Resolution, Problem, Comments.
5. In the Service Request block, select values for the various fields to limit your search.
6. Choose Find.

The Knowledge Base Search Results window appears and displays the results of your query.



7. In the Knowledge Base Search Results window, choose Comments to view comments attached to a service request (if any exist).

## See Also

Entering Service Requests: page 5 – 12

Entering Comments: page 5 – 25

## Expert Mode Search with Oracle ConText, *Oracle Web Customers*

## Entering Comments

You can enter one or more comments for a service request, depot repair line, or customer product. Use the All Comments button in the Comments window to view all comments associated with a particular request, repair line, customer product, or call.

► **To enter comments:**

1. Navigate to the Comments window.

Comments	Entered By	Entered Date	Source Type

2. Enter a comment.

You can use either the short Comments field or the larger Comment area to enter your text.

3. Optionally check Make Public to make this comment visible to anyone who queries the associated request, repair line, or installed base record using Oracle Self-Service Web Applications.

This box's status defaults from your setting for the profile option *Service:Default Make Public Flag*.

4. Optionally modify the Entered By field.

If this comment is linked to a service request, the default value in this field is the service request owner. The Entered By person must be an active employee in the Human Resources system.

5. Save your work.

When you save, the Entered Date displays automatically.

## **See Also**

Defining Customer Products: page 3 – 25

Entering Service Requests: page 5 – 12

Viewing Repair Lines: page 7 – 13

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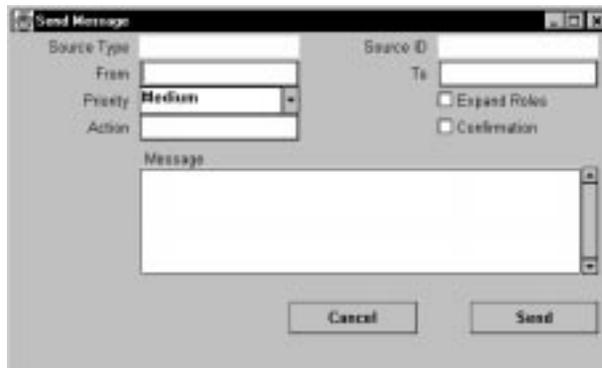
## Creating Messages

You can communicate with other users by sending messages from the service request and depot repair modules. For example, you can send a message for a specific service request from the Service Requests window that contains a request for action. In this case, a response is required of the message's recipient to indicate whether the action is accepted, rejected, or completed. In addition, you can choose to have a confirmation sent to you once the recipient has responded to your message.

► **To create and send a message:**

1. Query an existing service request, enter a new one and save your work, or query a repair line.
2. Choose Send Message from the Special menu.

The Send Message window appears.



3. Enter the sender's name in the From field.

You can enter any value, or use the list of values to select from all roles defined for use with Oracle Workflow. The default value is the Workflow display name of the current user; if the user's Workflow role cannot be determined, the FND username defaults.

4. Enter the recipient's name in the To field.

The recipient's name must be defined amongst the Workflow roles.

5. Assign a Priority.

**Note:** This priority has no correlation with Workflow notification priorities.

6. Optionally select an Action for the recipient to perform.  
Your choices in this field depend on the message action QuickCodes that have been set up.
7. Check Expand Roles if you plan to send this message to a Workflow role that includes several individuals and if you want each person to receive a copy of the message.  
  
By default (if this box is not checked), one message is sent to the role as a whole. If one individual responds to or closes the message, the message is removed from the Inboxes of all other individuals in that role.
8. Optionally check Confirmation if you want to receive a confirmation message once the recipient has responded to your message.  
  
**Note:** If you check Confirmation, the From field is validated to ensure that the sender is a valid Workflow role. Also, you cannot check Expand Roles if you check Confirmation.
9. Enter your message text.
10. Save your work.

## See Also

Entering Service Requests: page 5 – 12

Viewing Repair Lines: page 7 – 13

Setting Up Message Action Codes: page 2 – 42

Viewing Message History: page 5 – 29

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## Viewing and Responding to Messages

If you have received messages, you can view and respond to them in any of three ways: via your email application, via a Web page, or (if you are an Oracle Applications user) via the Notifications Summary window.

► **To respond to messages in Oracle Service:**

1. Navigate to the Notifications Summary window.
2. Select a message and choose Open.

The Notifications window appears.

3. Choose Respond and choose your response from the Result list.

If the message does not include an action request, you must respond with Acknowledge. Otherwise, choose one of the following responses:

- *Accept* if you accept the responsibility of performing the requested action
  - *Reject* if you reject the responsibility of performing the requested action
  - *Done* if you have completed the action
4. Optionally enter additional comments, such as your reason for rejecting the request.
  5. Choose OK.

A confirmation message will be sent to the original message's sender if and only if the sender checked Confirmation.

## See Also

Creating Messages: page 5 – 27

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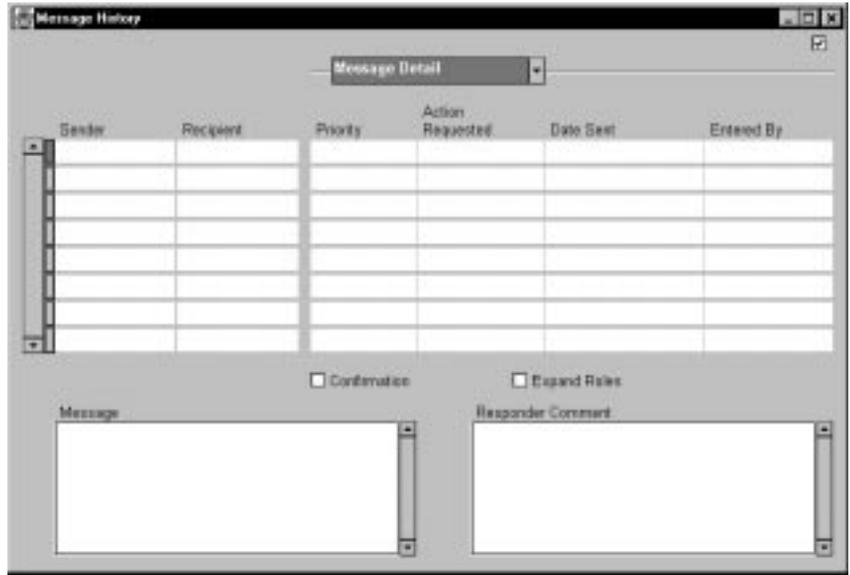
## Viewing Message History

You can view the message history of a particular service request.

► **To view message history:**

1. Query a service request.
2. Choose Message History from the Special menu.

The Message History window appears, displaying sender, recipient, and response information for all messages that were sent concerning the service request.



## Recording Customer Interaction

You can record all customer interaction for a service request by logging incoming and outgoing calls. Each time a new service request is created, a call is logged with the call type Request Created. If this is a Web request, whenever the service request is created or updated via Oracle Self-Service Web Applications, a new call is created with the Request Created or Request Updated type. See: *Service Requests, Oracle Web Customers*.

► **To log a call:**

1. Navigate to the Calls window.

Caller	Entered By	Call Type	Call Date	Call Details

Caller Phone  Ext  Email   
Caller Fax  Customer   
Call Duration  Minutes

Call Details

Followup Required      Followup Type       Followup Date   
 Outgoing Call       Entered By Customer       Make Public

2. Select the caller's name.
3. Optionally modify the Entered By name.  
The value defaults from the service request's owner.
4. Select a Call Type.  
You can use one of the two system-defined values (Request Created and Request Updated), or a call type you have defined. See: *Setting Up Call Types: page 2 - 43*.
5. Optionally modify the Call Date.
6. Enter call details, either in the short field or in the larger area.

7. Enter contact information, including phone and fax numbers and email address.
8. Enter the call duration.
9. Optionally check Followup Required.  
If you check this box, also select the Followup Type and optionally enter a Followup Date. See: Setting Up Call Followup Types: page 2 – 44.
10. Optionally check Outgoing Call if you called the customer.
11. Optionally check Make Public to make this comment visible to anyone who queries the associated request, repair line, or installed base record using Oracle Self-Service Web Applications.  
This box's status defaults from your setting for the profile option *Service:Default Make Public Flag*.
12. Save your work.  
If this call was logged automatically as a result of a customer entering a service request, the Entered By Customer flag is toggled on. You cannot update this flag. Any comments the customer may have entered on the Web are part of the call detail.

## See Also

Entering Service Requests: page 5 – 12

## Viewing Service Request Audit History

You can view audit history for each recorded service request. As you change the service request owner, status, etc., Oracle Service records the person who made the change, the date, and the old and new values. The following service request data is audited:

- status
- owner
- type
- urgency
- severity
- expected resolution date
- new action added
- workflow launched

► **To view service request audit history:**

1. In the Service Requests window, choose Audit History.

Update Date	Updated By	Old	New	Old	New

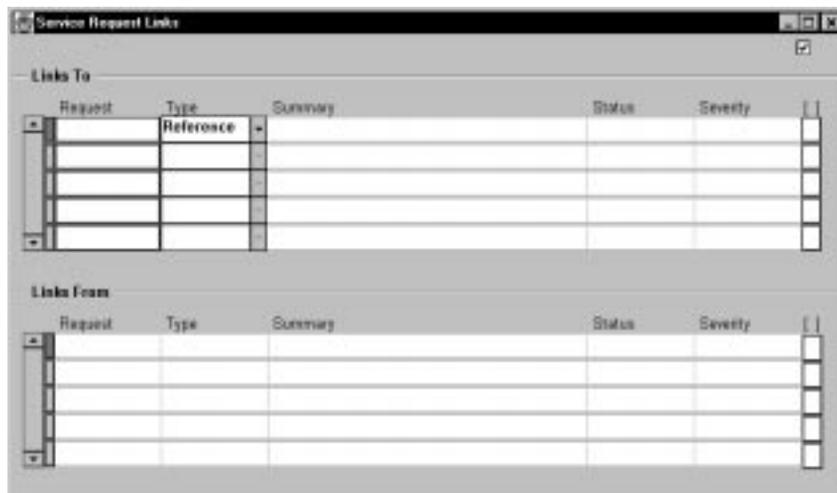
2. Optionally, enter audit comments.

## Creating Service Request Links

You can link service requests for reference or to identify duplicate reported service requests for later statistical analysis.

► **To define service request links:**

1. Navigate to the Service Request Links window.



The screenshot shows the 'Service Request Links' window. It contains two tables: 'Links To' and 'Links From'. Both tables have columns for 'Request', 'Type', 'Summary', 'Status', and 'Severity'. The 'Links To' table has a dropdown menu for 'Type' with 'Reference' selected. The 'Links From' table is currently empty.

2. Select a Service Request.
3. Choose a relation type.

A Reference relates this request to another service request, and a Duplicate is a relation to an identical service request.

4. Save your work.

## Entering Service Request Actions

You can associate multiple actions with each service request. Each action can be assigned to a different person to best resolve the service request. An action represents an activity associated with a service request.

► **To define service request actions:**

1. In the Service Requests window, choose Actions.

The Actions window appears.

Action	Assignee	Type	Status	Severity	Active Workflow	Dispatch Rate
					<input type="checkbox"/>	
					<input type="checkbox"/>	
					<input type="checkbox"/>	

**Action Detail**

Summary:

Description:

Resolution:

**Dates**

Start:  End:

Expected Resolution:  Actual Hours:

**Note:** The Action sequence number is generated automatically, and can be overwritten.

2. Choose an Assignee responsible for resolving the action.

The assignee must exist in the employee master table.

3. Choose an action Type.

The type refers to the nature of the action. If you define action types related to service request types, then you can only choose an action type related to the service request type in the Service Requests window. See: Setting Up Service Request Types: page 2 – 36.

4. Choose an action Status.

This status reflects the current state of the action. An example of an action status is In Process.

If you define statuses related to action types, then you can only choose a status related to the action type you choose. See: [Setting Up Service Request Statuses: page 2 – 33](#).

5. Optionally choose an action Severity.
6. Enter the action Summary.
7. Enter a Description giving concise details about the service request action.
8. Enter an action Resolution for the service request.
9. Enter an Expected Resolution date.

**Note:** The Start date will default to the current date and time. When you enter an End date, the Actual Hours are calculated. Alternatively, if you enter the Actual Hours, the End date will be calculated. You can override the calculated Actual Hours if necessary.

10. Save your work.

After you save, the Launch Workflow and Dispatch buttons become active.

## See Also

[Service Request Action Workflow: page 9 – 13](#)

[Dispatching Service Personnel: page 6 – 6](#)

[Viewing Action Audit History: page 5 – 37](#)

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## Service Request Action Updating

You cannot change the type and assignee of a service request action while an active workflow process exists for that action.

If you close a service request action that has an active workflow process, a warning appears asking whether you want to abort the workflow process. Choose OK to abort the workflow.

## See Also

Entering Service Request Actions: page 5 – 35

Service Request Action Workflow: page 9 – 13

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## Viewing Action Audit History

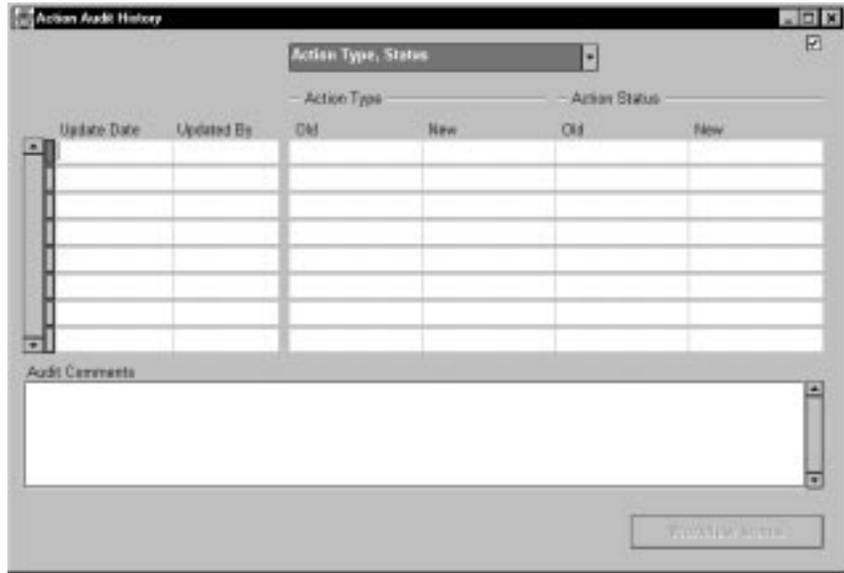
You can view audit history for changes to service request actions. As you change an action's assignee, status, etc., Oracle Service records the person who made the change, the date, and the old and new values. The following action data is audited:

- status
- severity
- type
- expected resolution date
- action
- workflow process name

► **To view action audit history:**

1. In the Service Requests window, choose Actions.
2. In the Actions window, choose Audit History.

The Action Audit History window appears.



3. Choose Workflow Status to view workflow-specific information.

## Viewing and Updating Service Requests

View each service request on line for current information or historical occurrences. Review historical information to show trends for a quality impact. You can also view information about the customer, the customer product, and any service requests. You can use the View Service Request window to find previous service requests for a combination of product, customer, severity, etc.

► **To view a service request:**

1. Navigate to the View Service Requests window.

The Find Service Requests/Actions window appears.

The screenshot shows a software window titled "Find Service Requests / Actions". It is divided into several sections for search criteria:

- Service Request:** Fields for Request, Caller (dropdown menu showing "Customer"), Contact, Product, System, Dates, Verified (dropdown menu), Type, Name, Severity, Closed (dropdown menu), Status, Number, Owner, Serial Number, Urgency, Postal Code, and Published.
- Text Search:** Search Option (radio buttons for "Any Word", "All Words", "Phrase", "Expert Mode"), Keywords (text input field), and Search In (checkboxes for "Request/Comment", "Translation", "Product", "Comments").
- Action:** Fields for Action, Assignee, Type, and Severity.
- Display:** Checkboxes for "Requests", "Actions", and "Request Links".

At the bottom right, there are "Clear" and "Find" buttons.

2. Enter or choose data from the available fields to identify the record to view. You can narrow your search by entering a Service Request number, a Customer, Type, or any combination of the available fields. To begin your search, choose Find.
  - Set Verified to Yes to view service requests entered in verify mode. Verify mode means that the Verify Request check box was checked when the service request was entered. You can also set Verified to No for non-verified requests, or leave it blank to

retrieve all requests that satisfy your other criteria regardless of whether they are verified.

**Note:** From this window you can perform a search to find the record to view. By placing a keyword(s) in the Keywords field, you can then specify the general area to conduct the search: Summary, Resolution, Problem, Comments, or a combination. After defining the search, you can choose the area to display: Requests, Actions, Request Links, or a combination of these. For more information on searching, see: Searching the Knowledge Base: page 5 – 22.

3. Select the record to view from the Service Requests Summary window, then choose Open.

**Note:** Do not modify your service request in the Service Requests Summary window.

4. Optionally navigate to the following alternative regions to update information:
  - Caller
  - Product, Services
  - Problem Description
  - Request Address, Detail
  - Address: Bill To, Ship To
  - Problem Resolution

## See Also

Entering Service Requests: page 5 – 12

Entering Service Request Actions: page 5 – 35

CHAPTER

# 6

## Field Service

**T**his chapter provides you with an overview of Oracle Service's field service features, and with detailed information about the following:

- Overview of Field Service: page 6 – 2
- Field Service Dispatch Process Flow: page 6 – 4
- Dispatching Service Personnel: page 6 – 6

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## Overview of Field Service

Oracle Service's field service functionality manages the servicing of products at customer sites. You can create field service requests; select engineers for dispatching; track labor, material, and expenses incurred during a field service visit; and bill your customer for additional services beyond the support services that cover the customer's product.

Once a field service request has been logged, you can use a rules-based engineer assignment system to ensure that the correct service personnel are sent to the customer site. Once you have selected an engineer, you can notify both the engineer and the customer about the planned field service visit. Alternatively, based on field service request parameters, you can move the request through a workflow-based resolution process that reflects your practices.

Additionally, you can use Oracle Service's messaging capability to facilitate communication amongst field engineers, customer service personnel, and customers. For example, before a field service visit, an engineer might send an email to your customer requesting additional information about the service request. Oracle Service can track all inbound and outbound communication associated with a service request to provide you with an event history.

Not only can service personnel log service request actions and the hours required to resolve each, but they can enter charge information. For example, field service personnel might use Oracle Service's billing functionality in conjunction with Order Entry/Shipping and Inventory to accomplish tasks such as the following:

- Log labor, material, and expenses incurred while resolving a field service request
- Decrement truck stocks automatically via material transactions
- Ship products not in their truck's stock to a customer site for use in resolving a field service request
- Perform upgrades, updates, replacements, or exchanges for customer products already installed at a customer site, and update the installed base automatically to reflect the products' current status

### See Also

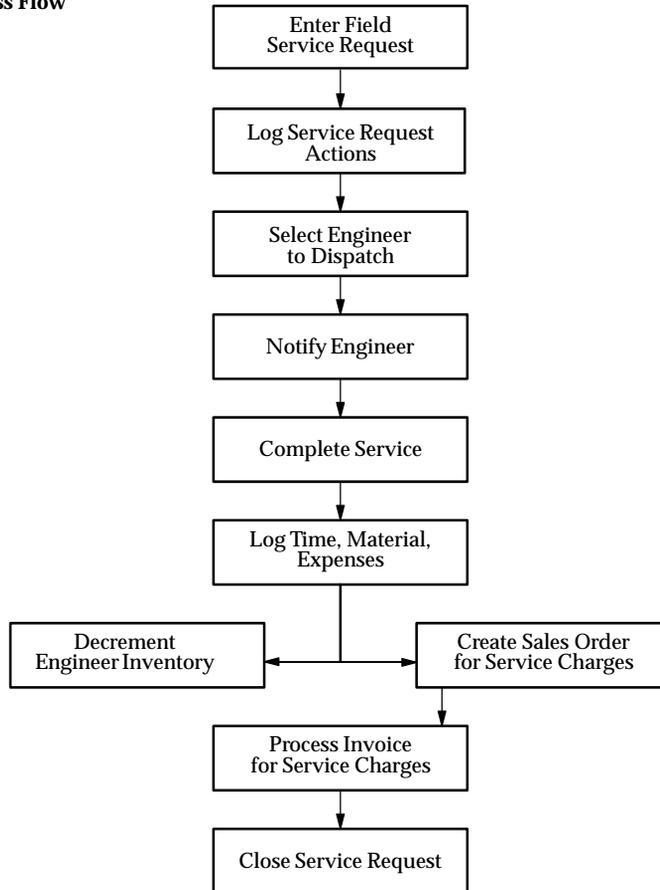
Field Service Dispatch Process Flow: page 6 – 4

Dispatching Service Personnel: page 6 – 6

Overview of Service Billing: page 8 – 2

# Field Service Dispatch Process Flow

Figure 6 – 1 Field Service Process Flow



## Setup

Before you enter field service requests, define the service group and support level combinations that categorize your field service personnel by skill and ability. Service groups are a means of loosely grouping together field service personnel; support levels indicate varying grades or skills. You can associate one or many support levels with each service group. In the Dispatch Rules window, specify rules to match service group/support level combinations with particular customers, products, and geographical locations. These rules will be used when you dispatch personnel to address service requests. Also, define action

types, statuses, problem codes, and resolution codes for your field service requests.

### **Service Request Entry and Personnel Dispatch**

When a service request is logged, enter a service request action to follow up on the request. Dispatch your personnel to resolve the request, either manually or according to the dispatch rules you have defined. After you assign personnel to a service request action, you can launch a customized workflow process (if you have associated one with the action type) to coordinate notifications and instructions for the appropriate employees.

### **Resolution and Billing**

You can bill your customer for labor, materials, and expenses while addressing a service request or after resolving one. Use the Field Service transaction group in the Charges window when you enter charge details. Keep track of materials used in resolving the request by entering information in the Transactions window. When you submit a charge as a sales order, billing information interfaces with Oracle Order Entry/Shipping to be passed to Oracle Receivables, and material transaction information interfaces with Oracle Inventory.

## **See Also**

Setting Up Field Service Personnel: page 0 – 45

Setting Up Support Levels: page 0 – 46

Setting Up Service Groups: page 0 – 48

Setting Up Dispatch Rules: page 0 – 51

Entering Service Requests: page 5 – 12

Entering Service Request Actions: page 5 – 35

Dispatching Service Personnel: page 6 – 6

Overview of Service Request and Action Workflows: page 9 – 2

Entering Charges: page 8 – 3

Material Transactions for Depot Repair and Field Service: page 8 – 12

## Dispatching Service Personnel

After you define service request actions, you can assign service personnel to resolve the actions according to rules you have defined. For any action, select personnel in one of the following ways:

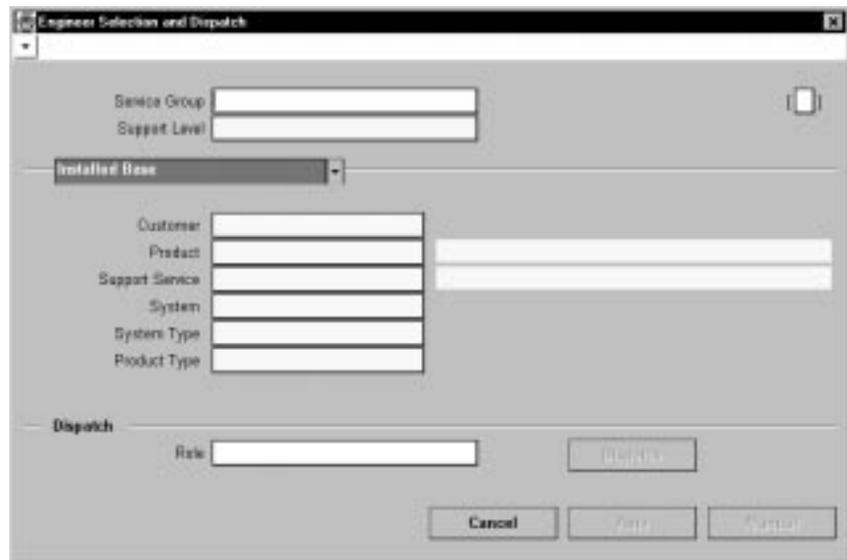
- Oracle Service automatically assigns a role that meets all of the limiting parameters you define
- you assign a role from a list of personnel who meet the parameters you define
- you assign a role from a list of all available service personnel without specifying any parameters

### Prerequisites

- Define your dispatch rules. See: [Setting Up Dispatch Rules: page 0 – 51.](#)
- Enter a service request action. See: [Entering Service Request Actions: page 5 – 35.](#)

#### ► To dispatch field service personnel:

1. Navigate to the Engineer Selection and Dispatch window.



2. Select a service group.

3. Select a support level.

All of the dispatch parameters that were selected in the Dispatch Rules window for this service group/support level combination are now available. Additionally, some parameters may have values defaulted from your service request.

4. Optionally select or modify values for the available parameters.
5. Choose either Auto or Manual.

If you choose Auto, Oracle Service assigns a role that meets all the criteria you have entered.

If you choose Manual, also select a role from the displayed list of all roles that satisfy your criteria.

6. Choose the Dispatch button to launch the Service Dispatch workflow process.

If the role assigned to this action includes several individuals, each receives a notification.

## **See Also**

Service Request Action Workflow: page 9 – 13



# Depot Repair

**T**his chapter provides you with an overview of Oracle Service's depot repair process. It describes how you can manage the product repair and replacement process. Oracle Service efficiently manages your repair depot through tight integration with Oracle Order Entry/Shipping, Oracle Work in Process, and Oracle Receivables.

This chapter provides you with detailed information about the following:

- Overview of Depot Repair: page 7 – 3
- Depot Repair Process Flow: page 7 – 5
- Receiving Damaged Products: page 7 – 6
- Processing Damaged Products: page 7 – 7
- Diagnosis: page 7 – 8
- Repair Charges: page 7 – 8
- Customer Approval: page 7 – 8
- Replacement: page 7 – 9
- Repair Jobs: page 7 – 9
- Order Types: page 7 – 10
- Splitting Repair Lines: page 7 – 11
- Viewing Repairs: page 7 – 12
- Viewing Repair Lines: page 7 – 13

- Repairs Special Menu: page 7 – 16
- Splitting Repair Lines: page 7 – 17
- Associating a Repair Line with the Installed Base: page 7 – 18
- Diagnosing a Repair: page 7 – 18
- Obtaining Customer Approval or Rejection for a Charge: page 7 – 19
- Viewing Repair Jobs: page 7 – 20
- Viewing Repair History: page 7 – 21
- Returning Damaged Products: page 7 – 22
- Closing Repair Lines Manually: page 7 – 23
- Repair Jobs: page 7 – 24

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## Overview of Depot Repair

Depot repair manages the repair of damaged products returned by customers. It tracks the repair process from the time products are received into inventory to the point they are shipped back to the customer after repair. During this process, you can verify support service coverage for the damaged product, diagnose the problem with the product, estimate the cost of repair to the customer, obtain customer approval for the price of repair, and define repair jobs in Oracle Work in Process (WIP) to resolve the problem. At the end of the repair process, you can create a repair order detailing the charges to the customer for the repair. You can also choose to create a repair order before the repair is complete.

Since different companies have different business rules governing this function, Oracle Service allows you to configure the depot repair process to suit each business' needs. For example, a company that repairs televisions and relies on individual technicians to diagnose and repair televisions can create a sales order after a repair has been diagnosed. In this situation, the company can create a WIP job for a repair after a sales order has been created. Another company that repairs automobiles may want to allow the creation of a sales order for repair work only after the repair job has been completed in WIP and the exact price to be charged to the customer is known. You can then create sales orders after the repair job has been completed. Until then, the technicians are free to change their estimate for repair costs.

Depot repair is tightly integrated with other Oracle applications. Return material authorizations (RMAs) are created in Order Entry/Shipping. Damaged products are received by Oracle Inventory and, once repaired, are shipped back to the customer from Oracle Inventory. Repair jobs are created and processed in Oracle Work in Process. Sales orders for repairs are created by Oracle Service in Order Entry/Shipping, then interfaced to Oracle Receivables for invoicing. Depot repair enables you to manage this complex process easily. It provides you with a consolidated and current view of all products returned for repair enabling you to answer your customer's queries accurately. For any repair line, you can find its latest status, the date it was received, diagnosis, status of the repair job associated with that line, support services associated with the line, estimated repair price, sales order number, and whether the product has been shipped back to the customer.

Depot repair utilizes the installed base to determine the support services covering the returned customer product. If the product is under serial number control, depot repair will automatically link the

product to the corresponding record in the installed base, allowing you to view the support services covering the returned product. If not, depot repair will facilitate the definition of a link between the returned product and the corresponding customer product in the installed base. Even if the product being returned by the customer does not exist in the installed base, depot repair still allows you to process the repair line. In this case, the information stored in the installed base, such as service programs associated with customer products, is not available. Therefore, even if your installed base is not current, you can still use depot repair to streamline your repair process.

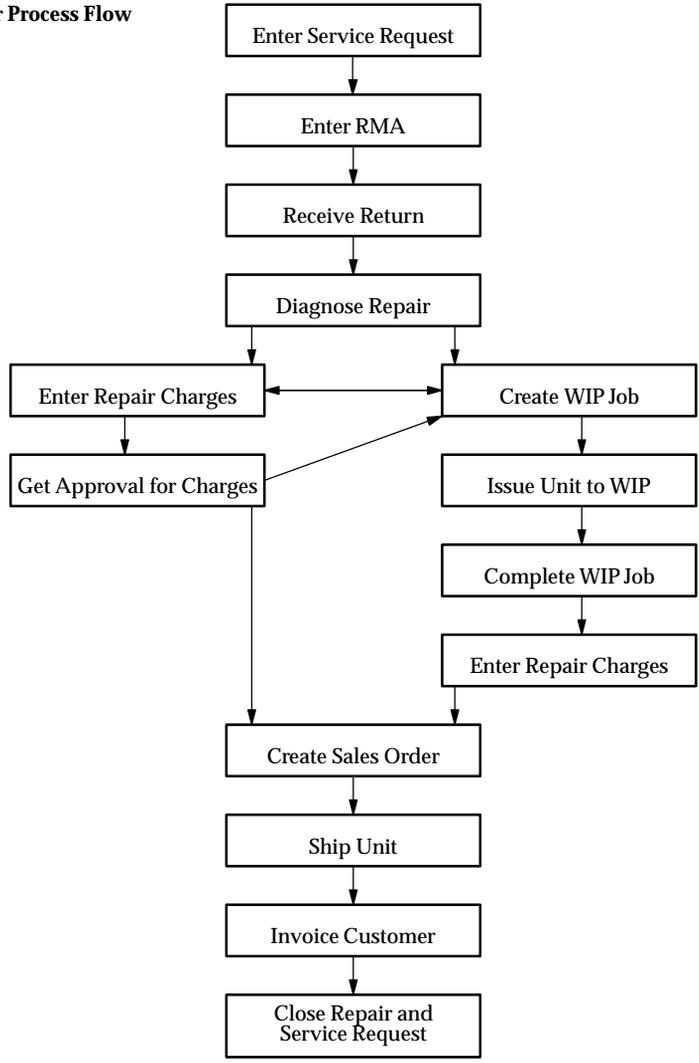
Often, the damaged product returned by the customer is not repairable or a replacement is needed immediately. Depot repair will enable you to ship a replacement for the damaged product whenever you wish. You can control the amount billed for the replacement. If you have a service request linked to the RMA that created the repair lines, you can consolidate the charges entered for the request and all the repair lines. You can then create one or more sales orders for the charge details.

Repair technicians can use Oracle Service's billing functionality in conjunction with Order Entry/Shipping and Inventory to accomplish tasks such as the following:

- Log labor, material, and expenses incurred while repairing a product in the repair depot
- Ship products once they have been repaired
- Ship replacements for products that cannot be repaired
- Update customer products in the installed base to reflect their current status

# Depot Repair Process Flow

Figure 7 – 1 Depot Repair Process Flow



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## Receiving Damaged Products

### Return Material Authorizations

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The repair process may begin with a customer calling the support center with a problem. If you create a return material authorization (RMA) via the Service Requests window, depot repair will be able to link each repair line to an RMA as well as to the service request. A person diagnosing the problem with the returned product can then view all the symptoms reported by the client, various actions taken to resolve those symptoms, and the service solutions already attempted. Information such as the customer name and number is defaulted to the Returns window to reduce data entry. In the Returns window, each RMA line that represents products returned for repair should be marked accordingly. This enables the Depot Repair Control concurrent program to bring only those products that are to be repaired through depot repair.

Once an RMA has been received, you can view all RMA lines as repair lines in the Repairs window. The Depot Repair Control concurrent program automatically populates depot repair whenever an RMA is fully received in Inventory.

You can process repairs even if the entire quantity has not been received. For example, if your customer promises to return two units but only returns one of them, you can initiate repair for the quantity returned. Repair for the other unit begins after you have received it.

**Note:** For a product to be returned through an RMA, the item attribute *Returnable* must be Yes.

### See Also

Overview of Returns, *Oracle Order Entry/Shipping User's Guide*

Defining Items, *Oracle Inventory User's Guide*

### Depot Repair Control

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Depot Repair Control, a concurrent program, automatically populates depot repair whenever an RMA is received in Inventory. The Depot Repair Control program creates repair data based on RMA receipts. All RMA lines designated as Return for Repair lines are eligible. While creating repair lines, RMA lines for serialized items with a quantity greater than one are split into multiple lines of quantity one, each with a unique serial number. If the customer product in the installed base

can be identified with the repair line, the program also links the customer product to the repair line automatically. For non-serialized items, customer product information is not captured by the concurrent program, but a customer product can be linked to a repair in the Repairs window.

The Depot Repair Control program also updates the status of repair lines whose jobs are completed in WIP and closes repair lines that have been shipped back to the customer.

## See Also

Concurrent Processes: page 2 – 56

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## Processing Damaged Products

The Repairs window is used to inquire the status of a returned product, split repair lines, link a repair line to a customer product in the installed base, and capture repair diagnosis, charge, and approval information. You can also use this window to create sales orders to ship repaired products, ship replacements, and invoice your customer for repairs.

The Repair Jobs window is used to submit nonstandard repair jobs to Oracle Work in Process.

### Flexible Repair Process

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Depot repair allows users to define the minimum status (diagnosed, estimated, or estimate approved) of repair lines required to create a nonstandard WIP job. For example, if repairs can be started as soon as the problem is diagnosed, the *Service:Minimum Repair Status for Submitting Jobs* profile option should be set accordingly, and all repairs that have been diagnosed will be allowed to go into WIP. Alternately, if the estimate for repairs has to be approved by the customer before repairs can begin, then by setting the profile option accordingly, only those repairs that have estimate approval from the customer will be allowed to go into WIP. Repairs that do not have estimate approval from the customer are automatically excluded from being selected to be processed in WIP.

You can optionally override the setting for *Service: Minimum Repair Status for Submitting Jobs* by checking the Allow Job box in the Repairs window. For example, if the profile option is set to Charges Approved

and you want to submit a job for a repair that has the status Charges Entered, check the Allow Job box to allow creation of a WIP job.

## See Also

Oracle Service Profile Options: page 2 – 9

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## Diagnosis

For every repair line, Depot Repair allows you to select a diagnosis code. You can use this diagnosis code to determine the material and resource requirements for repairing the product. You may also use this code to determine the most frequent problems with various products.

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## Repair Charges

Based on your diagnosis, you can estimate the cost of repair to the customer. Your estimate can include time, material, and expenses that you will incur in repairing the product. You can use customized price lists to vary repair prices by customers or product lines. If the product is covered by a warranty or service program, you can optionally apply that support service to discount the charge by the amount that the support service covers. You can also modify the repair charge after the repair has commenced so that unforeseen expenses can be charged to the customer.

Alternatively, if your business does not estimate charges before repairing an item, you can perform the repair and later charge for the time, material, and expenses incurred. You can modify charge details until you create a sales order.

## See Also

Entering Charges: page 8 – 3

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## Customer Approval

If you have created a charge, you can ask your customer to approve the estimated costs. If the customer agrees to the charge, a valid contact

for that customer must approve it. Alternatively, the customer contact may reject the charge. In these situations, you can either return the product to the customer, or create a sales order to ship the product or replacement back to the customer. The charges in the estimate will default to the sales order, enabling you to charge for services already rendered, such as a diagnosis.

## See Also

Obtaining Customer Approval or Rejection for a Charge: page 7 – 19  
Overview of Customers, *Oracle Order Entry/Shipping User's Guide*

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## Replacement

If a damaged product cannot be repaired or the customer needs a replacement product immediately, depot repair allows you to send a replacement to the customer and optionally to track the damaged product through the repair process. Once the replacement product is shipped, the original customer product in the installed base is updated with a status of Replaced, and a new customer product for the replacement is created with the status Latest. You can optionally set statuses to any valid system-defined status. For example, for a Replacement transaction, you can set a replacement product's status to *Current* instead of *Latest*.

You can also send an advance replacement before the customer returns the damaged product and optionally track the returned item through the repair process.

## See Also

Installation Details: page 3 – 16

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## Repair Jobs

You can optionally use Oracle Work in Process to track material and resources used in repairing the damaged products. Depot repair creates a nonstandard repair job in Work in Process to accomplish this. You can group repair lines for the same product returned by different customers into one repair job or multiple repair jobs. Multiple jobs are

always created for repair lines that indicate a different product returned by different customers. You can optionally change the product while creating a repair job. For example, if part A is returned and the repair job upgrades part A to part B, you can create and complete a job for part B and ship it as the upgraded part. (A single job is created for each repair line if you change a repair line's product while submitting a job.) You can create a job in Work in Process for a repair line even after you have created a sales order for that repair line.

You can pass the job name repair completion date as well as the repair routing to Work in Process. Depot repair enables you to view the current status of the repair job. Depot Repair Control updates the repair line status once the repair job has been completed in Work in Process.

You can optionally process the repair job and the sales order in parallel. If you want to create a sales order before the repair job is complete, you can do so to reduce the overall time needed for sales order processing.

## See Also

Viewing Repairs: page 7 – 12

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## Order Types

Order types determine the processing flow of the repair orders created by you. The sales order goes through the order cycle determined by the order type. The order type also determines accounting rules, invoicing rules, price list, etc.

While creating sales orders for repairs and returns, you should use an order type that does not have Service Interface as a cycle step. This is to ensure that the installed base does not get updated with incorrect information. For replacements, use an order type that includes Service Interface as a cycle step because replacements are automatically updated in the installed base if a customer product is linked with the repair. Separate Profile options may be set to default order types for Repair and Return and Replacement sales orders.

## See Also

Defining Order Types, *Oracle Order Entry/Shipping User's Guide*

Oracle Service Profile Options: page 2 – 9

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## Splitting Repair Lines

For products not under serial number control, each repair line brought into depot repair has a quantity equal to the number of products received against the corresponding RMA line in Oracle Inventory. However, each product that is returned may require individual processing. For example, a split may enable you to link a repairs line to a customer product from the installed base. A split may also be useful in creating multiple jobs for the same RMA line if the repair diagnoses for different products are different. Therefore, depot repair allows you to split a repair record into two user-defined quantities or into multiple lines of quantity one each. You can perform a split before processing a repair line.

Returned products that are under serial control are automatically split into multiple repair lines each with a quantity of one. Hence, they cannot be split further.

### See Also

Splitting Repair Lines: page 7 – 17

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## Viewing Repairs

The repair process starts when the Depot Repair Control concurrent process populates depot repair each time that an RMA is fully received in Oracle Inventory. All RMA lines designated as Repair lines are imported into depot repair for processing. For products not under serial number control, each repair line brought into depot repair has a quantity equal to the number of products received against the corresponding RMA line in Inventory. Returned products under serial control are automatically split into multiple repair lines, each with a quantity of one.

The depot repair process is driven by the status of a repair line which is updated at every step of the process, such as product receipt, split, diagnosis, estimation, approval, etc. At any point, the line's status indicates the most recent action performed on that repair line. The status can be one of the following:

<b>Status</b>	<b>Explanation</b>
RMA Entered	RMA created
Repair Received	Repair line received
Repair Record Split	Repair line has been split
Repair Diagnosed	Repair line has been diagnosed
Charge Entered	Repair charges have been entered
Charge Approved	Repair charges approved by customer
Charge Rejected	Repair charges rejected by customer
Repair Job in WIP	Nonstandard repair job has been created in WIP
Repair Completed in WIP	Repair job completed in WIP
Repair Order Created	Sales order for repair created in Order Entry
Repair Line Closed	Repaired product shipped to customer or repair line has been manually closed
Ready to be Returned	Item ready to be returned to customer

Each repair line also provides details, such as the associated service request number, WIP job name, sales order number, RMA number, or RMA type, to provide you with comprehensive information about the repair line.

Once an RMA has been fully received and the Depot Repair Control program has run, you can view all RMA lines as repair lines in the Repairs window.

## See Also

Viewing Repair Lines: page 7 – 13

Repairs Special Menu: page 7 – 16

Splitting Repair Lines: page 7 – 17

Associating a Repair Line with the Installed Base: page 7 – 18

Diagnosing a Repair: page 7 – 18

Obtaining Customer Approval or Rejection for a Charge: page 7 – 19

Viewing Repair Jobs: page 7 – 20

Viewing Repair History: page 7 – 21

Returning Damaged Products: page 7 – 22

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## Viewing Repair Lines

Repair lines provide you with comprehensive information about the product returned by your customer for repair. They enable you to accurately answer your customer's queries at any time. By observing a repair line, you can find its latest status, the date it was received, its diagnosis, the status of the repair job associated with that line, the support services associated with the line, estimated repair price, sales order number, and whether the product has been shipped back to the customer.

► **To view repair lines:**

1. Navigate to the Repairs window.

The Find Repairs window appears.

**Find Repair (Vision Operations)**

**Customer**  
 Name   
 Number

**Product**  
 Product   
 Serial   
 Reference

**RMA**  
 Type   
 Date   
 Number   
 Line   
 Received Date

**Repair**  
 Repair   
 Repair Status   
 Organization   
 Request   
 Diagnosis   
 Charge Num   
 Job Name   
 Order Num   
 Promised Delivery Date   
 Shipped Date

- In the Find Repairs window, enter search criteria for repair lines and choose the Find button.

The Repairs window appears.

**Repairs (Vision Operations)**

Repair	Product	Serial	Request	Reference	Allow Job	RMA	Status
					<input type="checkbox"/>		
					<input type="checkbox"/>		
					<input type="checkbox"/>		
					<input type="checkbox"/>		
					<input type="checkbox"/>		
					<input type="checkbox"/>		
					<input type="checkbox"/>		

Customer Name

Product Description

**RMA**  
 Type   
 Date   
 Line

**Receipt**  
 City   
 Date   
 Org

**Other**  
 Job Name   
 Order Num   
 Shipped Date

The Repairs window provides you with comprehensive information about each line. For each repair line, you can view the

product, its serial and reference numbers, RMA number, RMA type, RMA date and RMA line number, associated service request number, and current status. You can also view the quantity of each repair line, its Unit of Measure, the diagnosis, name of the WIP job created to repair the product, and the sales order against which it has been shipped back to the customer after repair. Not all this information is available at all times. As a repair line is processed, progressively more information is available. For example, when a repair line has just been diagnosed, the Job Name, Order Num, Shipped Date etc. may be blank. When a repair job is created in WIP, then the Job Name field is filled in. Subsequently, after the repair is complete and a sales order has been created for the product, the Order Num field is filled in and so on.

You can enter repair charges before or after a repair is complete. See: Entering Charges: page 8 – 3.

---

## Repairs Special Menu

This section lists the available options on the Special menu for the Repairs window.

<b>Comments</b>	See: Entering Comments: page 5 – 25
<b>Send Message</b>	See: Creating Messages: page 5 – 27
<b>Return Item</b>	See: Returning Damaged Products: page 7 – 22
<b>Undo Return Item</b>	See: Returning Damaged Products: page 7 – 22
<b>Close Repair</b>	See: Closing Repair Lines Manually: page 7 – 23
<b>Undo Close Repair</b>	See: Closing Repair Lines Manually: page 7 – 23
<b>Message History</b>	See: Viewing Message History: page 5 – 29

## Splitting Repair Lines

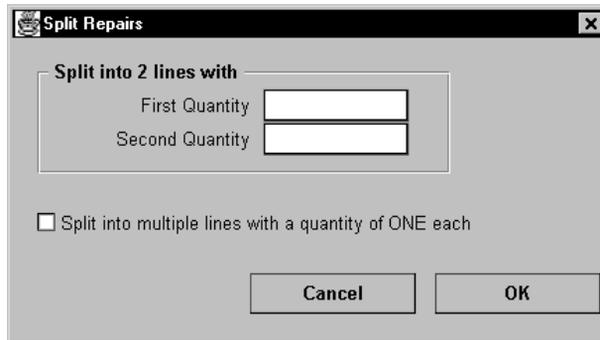
Often you will find that all products in a repair line need to be processed separately. To enable you to do this, depot repair allows you to split a repair line of nonserialized items with a quantity greater than one into as many lines as required. You can then track these repair lines individually.

While returned items under serial control are automatically split into multiple lines, each with a quantity of one, nonserialized items may be split using this functionality. For example, a split may help identify a customer product in the installed base. A split may also be useful to create multiple jobs for the same RMA line if the repair diagnoses are different. You can split a repair record into two user-defined quantities or into multiple lines of quantity one each.

► **To split a repair line:**

1. Enter search criteria in the Find Repairs window and choose Find to navigate to the Repairs window.
2. In the Repairs window, select the repair line to split.
3. Choose the Split button.

The Split Repairs window appears.



The screenshot shows a dialog box titled "Split Repairs". It contains a section "Split into 2 lines with" with two input fields: "First Quantity" and "Second Quantity". Below this is a checkbox labeled "Split into multiple lines with a quantity of ONE each". At the bottom are "Cancel" and "OK" buttons.

4. If the repair line has to be split into two lines, enter a value in the First Quantity field. The second quantity will automatically default in. Alternatively, select the check box to split the repair line into multiple lines with a quantity of one each.
5. Choose OK to split the repair line.

---

## Associating a Repair Line with the Installed Base

Repair lines for damaged products not under serial number control are not associated with customer products in the installed base by the Depot Repair Control program. This association has to be done manually.

A repair line can be linked to a customer product in the installed base. The customer product to be linked should have a quantity that equals the repair line quantity. If this is not so, you will have to split the installed base customer product or the repair line to make the quantity in both equal. A link between the customer product and the repair is required for identifying Support Services automatically and to track the replacement of a customer product.

- ▶ **To associate a repair line with a customer product in the installed base:**
  1. Enter search criteria in the Find Repairs window and choose Find to navigate to the Repairs window.
  2. In the Repairs window, select a Reference number.
  3. Save your work.

---

## Diagnosing a Repair

For each repair line, you can enter a diagnosis code reflecting the problem with the returned product. Based on your diagnosis, you can enter an estimated delivery date as well as an estimated repair job completion date.

- ▶ **To define a repair diagnosis:**
  1. Enter search criteria in the Find Repairs window and choose Find to navigate to the Repairs window.
  2. In the Repairs window, select a Diagnosis for your repair line.
  3. Enter a Job End Date.

Oracle Service passes this required field to Work in Process for backward scheduling of WIP jobs.
  4. Enter a Delivery Date.
  5. Optionally check Allow Job.

The Allow Job check box lets you override the value for the profile option *Service: Minimum Repair Status for Submitting Jobs*. If this profile is set to Charges Approved, you can still create a WIP job for repairs that have a status of Charges Entered by checking this box.

6. Save your work.

The status of the repair line is updated to Repair Diagnosed.

---

## Obtaining Customer Approval or Rejection for a Charge

Once you have estimated the cost of repair, you can obtain your customer's approval for the charge. This step may be optional or required, depending on your value for the profile option *Service: Minimum Repair Status for Submitting Jobs*.

### Prerequisites

- Enter a charge for a repair line. See: Entering Charges: page 8 – 3.

► **To indicate customer approval or rejection for a charge:**

1. Enter search criteria in the Find Repairs window and choose Find to navigate to the Repairs window.
2. Select a line, then choose the Approval button.

The Approval window appears.

The screenshot shows a software window titled "Approval". At the top, there are three input fields: "RNA Type", "Number", and "Quantity". Below this is a section titled "Estimate Information" containing "Estimate Num", "Charge", and "Promise Date" fields. Underneath is a "Diagnose" field. There are two radio buttons: "Approved" (which is selected) and "Rejected". Below the radio buttons are "Contact", "PO Number", and "Comments" fields. To the right of these is a "Contact Date" field. At the bottom right corner of the window is a "Done" button.

3. Select the Approved or Rejected check box to specify whether the charge has been accepted or rejected.

If the customer agrees to the charge, it must be approved by a valid contact for that customer. After you save your work, the line's status becomes Estimate Approved.

If the customer rejects the charge, you must assign a reason for the rejection. After you save your work, the line's status becomes Estimate Rejected.

## See Also

Setting Up Reject Repair Reasons: page 2 – 54

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## Viewing Repair Jobs

You can view the repair job associated with a repair line. This view provides you with details such as the number of operations completed and the resource and material requirements for each operation.

► **To view a repair job:**

1. Enter search criteria in the Find Repairs window and choose Find to navigate to the Repairs window.
2. In the Repairs window, select the repair line by clicking on any field on that line. If a WIP job is associated with the repair line, the View Job button will be enabled.
3. Choose the View Job button. The View Discrete Jobs Summary window appears.



4. View the current status of the job. You can determine the number of operations completed by various products being repaired in the WIP job.
5. Close the window to return to the Repairs window.

---

## Viewing Repair History

You can view all transactions that have been performed against a repair line.

► **To view repair history:**

1. Enter search criteria in the Find Repairs window and choose Find to navigate to the Repairs window.
2. In the Repairs window, select a repair line and choose History.

The History window appears, listing all transactions that have been performed against that repair line and the corresponding changes in the line's status due to each transaction.

Transaction Date	Transacted By	Status

---

## Returning Damaged Products

If the estimate for a repair line has been rejected, you can update the line's status to indicate that you are shipping the damaged product back to the customer.

Updating a repair's status to Ready to be Returned indicates that no further repair processing is required. The customer may have sent the wrong item, or the item that has been returned does not need repair. This feature is also useful if you track repair costs manually without using the automated WIP job creation process, discussed in the process flow. For example, an item may be received for repair and repaired in WIP via a manually created job. When the repair is complete, this feature will allow you to ship the repaired product to your customer.

- ▶ **To make a repair line eligible to be returned to the customer:**
  1. Enter search criteria in the Find Repairs window and choose Find to navigate to the Repairs window.
  2. Select a repair line, then choose Return Item from the Special menu.  
The status of the repair line will be updated to Ready to be Returned.
  3. Save your work.

**Note:** You can choose Undo Return Item from the Special menu to negate this action.

---

## Closing Repair Lines Manually

You may want to close a repair line manually for several reasons, such as if you create a sales order manually or if you ship an advance replacement and no longer need to track a repair. Updating a repair line's status to Repair Line Closed indicates that Oracle Service will not process the line any further.

► **To close a repair line manually:**

1. Enter search criteria in the Find Repairs window and choose Find to navigate to the Repairs window.
2. Select a repair line, then choose Close Repair from the Special menu.
3. Save your work.

The status of the repair line is updated to Repair Line Closed.

**Note:** You can choose Undo Close Repair from the Special menu to negate this action.

### See Also

Depot Repair Control: page 7 – 6

Viewing Repair Lines: page 7 – 13

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## Repair Jobs

Once you have diagnosed, estimated, or created a sales order for a repair line, you can use the Repair Jobs window to create single or multiple nonstandard repair jobs in Oracle Work in Process to perform the actual repair. Creating a job in Work in Process enables you to track the costs incurred by you in repairing damaged products. Work In Process jobs are created in the inventory organization in which the RMA was originally received.

You can also use the Repair Jobs window to create nonstandard discrete jobs. Repairs that are ready to be submitted into WIP can be selectively chosen and grouped into a single WIP job if you want to create only one job. You can group damaged products returned by multiple customers into the same job as long as the product is returned and the WIP job completion dates for the damaged product are the same. You can opt not to change the product before submitting the job.

By setting the site-level profile option *Service: Minimum Repair Status for Submitting Jobs*, you can flexibly define the minimum status (Repair Diagnosed, Charges Entered, or Charges Approved) of a repair line required to create a nonstandard WIP job. This profile option applies to all repair lines. For example, if repairs can be started as soon as the problem is diagnosed, set the profile option to *Repair Diagnosed*, and all repairs that have been diagnosed will be allowed to go into WIP. Alternatively, if the estimates for repair lines have to be approved by the customer before repairs can begin, then by setting the profile option accordingly, only those repair lines that have estimate approval from the customer will be allowed to go into WIP. Repair lines that do not have estimate approval from the customer are automatically excluded from being selected to be processed in WIP. If the Allow Job flag is set in Repairs, then any repair lines in the Repair Jobs window can be selected regardless of the profile option's setting. See: Oracle Service Profile Options: page 2 – 9.

The depot repair module creates a non-standard WIP job. You can view the job's status in the Repairs window. You can specify the job name while creating the repair job in the Repair Jobs window if the Single job creation option is selected. After the WIP job completes, the Depot Repair Control program updates the status of these repairs.

► **To create a WIP job for repairing damaged products:**

1. Navigate to the Repair Jobs window.

The Repair Jobs-Find Repairs window appears.

2. In the Repair Jobs–Find Repairs window, enter search criteria for repair lines that are ready for job submission in Work in Process. Check the Change Item box if you want to change the product before creating a repair job.
3. Choose Find.

Repair	Product	Serial	Org	Status	UOM	Qty

4. In the Repair Jobs window, select a product and Repair Org.
5. Select a WIP Accounting Class.
6. Enter a job completion date.
7. Enter a job name.

8. Select a routing reference.
9. If you selected a routing, optionally select an alternate routing.
10. Choose either Single Job or Multiple Jobs.

If the Single job option is selected, then one job is created for all the repair lines selected, and the quantity is the sum of the quantity for each repair line. If the Multiple jobs option is selected, one job is created for each line selected.

11. Select one or more repair lines.
12. Choose the Submit Job button to create one or more WIP jobs for all the selected repair lines.

When you choose Submit Job, the WIP Mass Load concurrent program is run to import the jobs into Oracle WIP. After the WIP job for repair is completed, you must run the Depot Repair Control program to change the status of the repair records.

# Service Billing

**T**his chapter provides you with an overview of Oracle Service's billing features, and with detailed information on the following:

- Overview of Service Billing: page 8 – 2
- Entering Charges: page 8 – 3
- Viewing Service Coverage: page 8 – 9
- Submitting a Charge As a Sales Order: page 8 – 10
- Material Transactions for Depot Repair and Field Service: page 8 – 12
- Entering Inventory Transaction Information: page 8 – 13

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## Overview of Service Billing

With Oracle Service's billing functionality, you can bill customers for services provided in response to support service requests, field service requests, or depot repairs. Related service requests and depot repair lines can share the same charge record.

For example, a customer logs a service request for a malfunctioning computer system. After trying to correct the problem remotely for a few hours, a technician is dispatched to fix the problem on-site. The technician works on the problem for some time, replaces some components, and finally ascertains that the problem lies with a major subcomponent that cannot be fixed in the field. The technician ships the subcomponent back to the repair depot for in-house repair, and the subcomponent is repaired and shipped back to the customer. At that point, a field engineer is dispatched again, this time to install the subcomponent. Service billing allows you to consolidate all of the labor, material, and expenses incurred during remote support, field service, and depot repair into a single charge with multiple lines, then bill the customer after the problem has been completely resolved.

Before you bill customers for services rendered, you can use the Apply Service feature to discount the charges for each product associated with a support service program. Alternatively, you can choose to discount charges manually. Oracle Service uses Oracle Order Entry/Shipping's OrderImport functionality to create one or more sales orders from the charges you enter.

The service billing module uses transaction types to determine the impact of each charge line. Examples of transaction types include Repair, Replacement, Material Transaction, Labor Transaction, Expense Transaction, and Expense Travel. You can define an unlimited number of transaction types.

### See Also

Entering Charges: page 8 – 3

Material Transactions for Depot Repair and Field Service: page 8 – 12

Overview of Service Requests: page 5 – 3

Overview of Field Service: page 6 – 2

Overview of Depot Repair: page 7 – 3

Setting Up Order Transaction Types: page 2 – 22

# Entering Charges

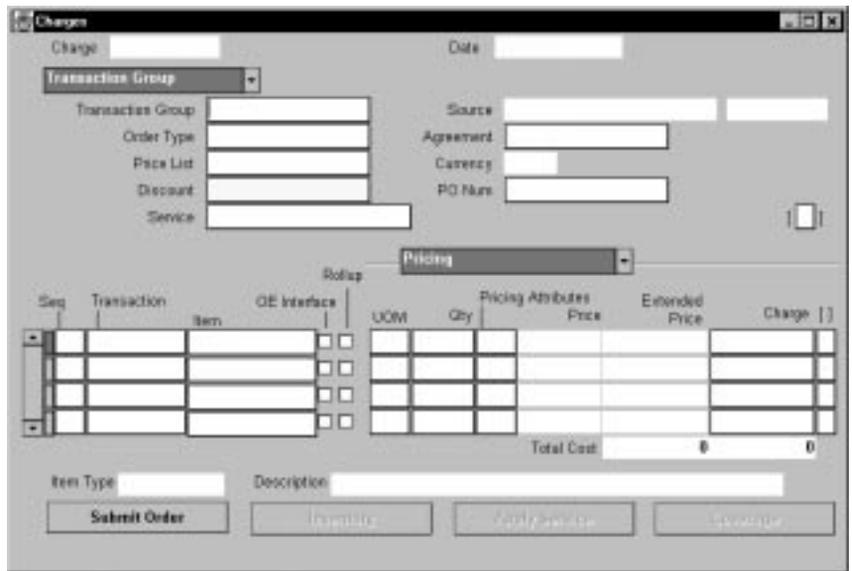
You can enter charges for a service request or a diagnosed repair line. Charge records can be shared by linked service request and repair lines.

## Prerequisites

- Enter a service request or create repair lines. See: Entering Service Requests: page 5 – 12 and Depot Repair Process Flow: page 7 – 5.

► **To define header-level charge information:**

1. Navigate to the Transaction Group header alternative region in the Charges window.



2. Select a Transaction Group or accept the default.

If the charge source is a service request, the transaction group associated with the request type defaults. If the charge source is Depot Repair, the transaction group defaults from your value for the *Service: Default Transaction Group for Depot Repair* profile option. In either case, you can change the default. See: Setting Up Transaction Groups: page 2 – 24.

If multiple repairs are associated with the same charge, you can optionally assign a different transaction group for each repair.

3. Select an Order Type or accept the default associated with the transaction group.
4. Optionally select an Agreement.  
An agreement will default if one is associated with your order type. The order type may require that you select an agreement.
5. Select a price list and an overridable discount.  
You must specify a discount, even if you want the price adjustment to be zero. See: *Overview of Pricing, Oracle Order Entry/Shipping User's Guide*.
6. Optionally enter a purchase order number with which to associate the charge.  
The order type may require that you enter a purchase order number.
7. Select a support service to apply to this charge.  
If the charge is for a service request or a repair linked to a customer product, the list of values for this field displays all support services available for the customer product; otherwise, all support services for the same product owned by the customer are displayed. You can select only one support service.
8. Navigate to the Bill-To/Ship-To header alternative region.
9. Select the Bill To and Ship To locations for the charge.  
If this charge is for a service request and you entered address information in the Service Requests window, that information defaults here. Otherwise, if you have a primary bill-to or ship-to address defined for the customer, those values default.
10. Save your work.

► **To view repair information for a charge:**

- Navigate to the Repair header alternative region in the Charges window.

If the charge source is Repair, this region displays information about the repair line. If the source is Service Request, this region displays information about the repair line(s) linked to the service request. If multiple repair lines exist for the record, use the Repair Num field to view them individually.

► **To view request information for a charge:**

- Navigate to the Request header alternative region in the Charges window. Information about your service request displays here.

► **To define charge details:**

1. Navigate to the details block in the Charges window.
2. Select a transaction type.

Your choices are limited by the header-level transaction group.  
See: *Setting Up Order Transaction Types: page 2 – 22.*

3. Select an item.

Your choices are limited by the billing type (material, labor, expense) associated with the transaction type you selected.

4. If you do not want to pass this charge detail to Oracle Order Entry, uncheck the OE Interface box.
5. Optionally check Rollup.

If this box is checked, when a sales order is created from this line, the line item does not pass to Order Entry. Instead, Oracle Service passes the rollup item for the item type to the OrderImport program. Your settings for the *Service: Repair Default Expense Item*, *Service: Repair Default Material Item*, and *Service: Repair Default Labor Item* profile options determine which rollup item is used. See: *Oracle Service Profile Options: page 2 – 9.*

► **To define pricing detail information for a charge:**

1. Navigate to the Pricing detail alternative region in the Charges window.
2. Select a unit of measure and quantity for your item.
3. Optionally, enter pricing attributes. See: *Flexfields in Order Entry/Shipping, Oracle Order Entry/Shipping User's Guide.*
4. Optionally, modify the Charge price manually by typing over the field value.

You can also modify the price by choosing the Apply Service button, if your customer has purchased a service program for this product. See: *Defining Service Programs: page 4 – 11.*

When you choose the Apply Service button, Oracle Service calculates the discounted repair charge for the customer based on

the support service selected in the Service field. For example, a service coverage may be defined to cover 50% of material up to \$250. This means that if one product is returned for repair, all materials used for repair will be given a discount of 50% up to a maximum of \$250. If the repair charges exceed \$250 after the discount, no further automatic discount will be given. If the repair line quantity exceeds one, the coverage is adjusted automatically for the repair line quantity. Calculation of charges for repair lines with a quantity of one or a service request (including service coverage) is shown in the following table.

<b>Coverage</b>	<b>Material</b>	<b>Labor</b>	
% covered	50	80	
Up to Amount	250	500	
<b>Estimate 1</b>			
	<b>Extended Price</b>	<b>Covered</b>	<b>Charge</b>
Material 1	500	250	250
Material 2	500	0	500
Total	1000	250	750
<b>Estimate 2</b>			
	<b>Extended Price</b>	<b>Covered</b>	<b>Charge</b>
Material 1	250	125	125
Material 2	500	125	375
Total	750	250	500
<b>Estimate 3</b>			
	<b>Extended Price</b>	<b>Covered</b>	<b>Charge</b>
Labor 1	500	400	100
Labor 2	200	100	100
Total	700	500	200

5. Save your work.

► **To define installed base detail information for a charge:**

1. Navigate to the Installed Base detail alternative region in the Charges window.

**Note:** Your ability to update fields in this region depends on the line's transaction type definition.

2. Select the installed customer product to which this charge corresponds.
3. Enter a Return By date for the installed and new customer products.

These fields may be required, depending on the line's transaction type definition.

4. Select the system to which this customer product belongs, or accept the default.

► **To define diagnosis information for a charge detail:**

1. Navigate to the Diagnosis detail alternative region in the Charges window.
2. Select a diagnosis or accept the default. See: Setting Up Diagnosis Codes: page 2 – 53.

► **To define sales order information for a charge detail:**

1. Navigate to the OE Details detail alternative region in the Charges window.
2. If you want to append this charge line to an existing sales order, check the Add to Order box and select an order number.

You can append charge lines only to sales orders imported into Order Entry/Shipping with a source of Service Billing (that were themselves created from charges).

3. Save your work.

Once Oracle Service has interfaced this charge with Oracle Order Entry, the Date, Line, and Reference fields are updated with the order date, line number, and order number, respectively.

► **To view all charges together:**

- Navigate to the Charges window and choose Find All from the Query menu.

Oracle Service retrieves all charges linked to your service request or repair line. You can navigate through the headers to view each set of charge details.

## See Also

Overview of Service Billing: page 8 – 2

Submitting a Charge As a Sales Order: page 8 – 10

Entering Inventory Transaction Information: page 8 – 13

Viewing Service Coverage: page 8 – 9

Overview of Returns, *Oracle Order Entry/Shipping User's Guide*

OrderImport, *Oracle Order Entry/Shipping User's Guide*

Integrating Oracle Order Entry/Shipping Using OrderImport, *Oracle Manufacturing, Distribution, Sales and Service Open Interfaces Manual, Release 11*

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## Viewing Service Coverage

After you select a service program for a charge, you can use the Service Coverage window to view what percent of labor, material, and expense costs a program covers (as applicable).

- ▶ **To view service coverage:**
  - Choose the Coverage button in the Charges window.

Service	Warranty	Labor		Material		Expense	
		% Covered	Upts Amount	% Covered	Upts Amount	% Covered	Upts Amount
	<input type="checkbox"/>						
	<input type="checkbox"/>						
	<input type="checkbox"/>						
	<input type="checkbox"/>						

Service Description: \_\_\_\_\_  
Service Coverage Dates: \_\_\_\_\_ - \_\_\_\_\_

## See Also

Entering Charges: page 8 - 3

## Submitting a Charge As a Sales Order

- ▶ **To create a sales order from a charge:**
  1. Navigate to the Charges window and enter estimate information. See: Entering Charges: page 8 – 3.
  2. Choose the Submit Order button.

A window appears with your order number in the title bar. The window displays all lines for your charge that are eligible to interface to Oracle Order Entry/Shipping.

Source	Number	Item	UOM	Qty	Charge

3. Verify that all values are correct, then choose the Submit button.

When you choose Submit, Order Entry/Shipping processes your data concurrently. The OrderImport program either creates a new sales order or adds a line to an existing order, depending on whether you specified an order number in the OE Details alternative region of the Charges window.

If you checked the Rollup box for an item in the Charges window, the corresponding line in the Orders window displays the rollup item specified by your profile option settings instead of the item you entered.

If your charges are based upon multiple repairs and if the repairs do not all have identical header information, OrderImport creates several sales orders to take care of the disparate information, which may include different order types, purchase order numbers, customer bill-to and ship-to locations, price lists, or agreements. Each order to be created is displayed individually. For example, if your charge results in two sales orders, Oracle Service displays the first order. After you submit it, Oracle Service displays the second order.

## **See Also**

Oracle Service Profile Options: page 2 – 9

Overview of Service Billing: page 8 – 2

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## Material Transactions for Depot Repair and Field Service

When you service customers' products, you can pass information to Oracle Inventory to decrement the quantity of used materials. You can use the Transactions window to enter all inventory-related information, including organization, location, lot, serial number, and revision. When you submit charge details to Oracle Order Entry/Shipping to invoice for a service, the inventory-related information you entered in the Transactions window passes automatically to Oracle Inventory. Inventory's Material Transaction Manager processes your data to decrement quantity.

If you do not use Oracle Work in Process for depot repair processing but want to decrement inventory for parts usage, you can enter your information in the Transactions window nevertheless. You will be warned about such transactions because depot repair assumes that all inventory transactions will be performed by Work in Process.

Before you use the Transactions window, you must define a transaction type in Oracle Inventory and specify the values for appropriate profile options. A transaction type is a combination of a transaction source type and a system-defined transaction action. Define a transaction source type, therefore, and associate it with the system-defined action *Issue from Stores* to create a suitable transaction type. Set the value of the profile option *Service:Field Service Transaction Type* to match this transaction type. Oracle Service will use the transaction type specified by the profile for all inventory transactions interfaced to Oracle Inventory. Also, set values for the *Service:Field Service Transaction Organization* and *Service:Field Service Transaction Inventory* profile options.

### See Also

Transaction Managers, *Oracle Inventory User's Guide*

Transaction Actions, *Oracle Inventory User's Guide*

Transaction Source Types, *Oracle Inventory User's Guide*

Transaction Types, *Oracle Inventory User's Guide*

Oracle Service Profile Options: page 2 – 9

## Entering Inventory Transaction Information

You can enter serial, revision, locator, and lot control information about an item on a charge. When you submit the charge as a sales order, this information interfaces automatically to Oracle Inventory.

### Prerequisites

- Define a charge detail. See: Entering Charges: page 8 – 3.

#### ► To enter inventory information for a charge:

1. Navigate to the Transactions window.

The image shows a screenshot of the 'Transactions' window in Oracle Inventory. The window has a title bar with the text 'Transactions' and standard window control buttons (minimize, maximize, close). The main area contains several input fields arranged in a form. On the left side, there are labels for 'Organization', 'Item', 'Serial Number', 'Revision', 'Subinventory', 'Locator', and 'Lot Number', each followed by a text input field. On the right side, there are labels for 'UOM' and 'Qty', each followed by a text input field. At the bottom right of the window, there are two buttons: 'Cancel' and 'OK'. The background of the window is a light gray color.

The Organization value defaults from your setting for the profile option *Service: Field Service Transaction Organization*.

2. If the item is under serial control, select a serial number.
3. If the item is under revision control, select a revision.
4. Optionally select a subinventory, or accept the default provided by the profile *Service: Field Service Transaction Subinventory*.
5. If the item is under locator control, select a locator.
6. If the item is under lot control, select a lot.

The lot's expiration date defaults.

7. Choose OK to save your work and return to the Charges window.

#### ► To correct interfacing errors:

- Use the Transaction Interface window in Oracle Inventory.

## See Also

Material Transactions for Depot Repair and Field Service: page 8 – 12  
Viewing and Updating Transaction Open Interface Activity, *Oracle  
Inventory User's Guide*

# Service Workflows

**T**his chapter provides you with an overview of Oracle Service's predefined workflows, and with detailed information on the following:

- Overview of Service Request and Action Workflows: page 9 – 2
- Service Request Workflow: page 9 – 4
- Call Support Process: page 9 – 5
- Notify Owner With Expiration Subprocess: page 9 – 7
- Escalation Subprocess: page 9 – 9
- Alert Supervisor Subprocess: page 9 – 11
- Service Request Action Workflow: page 9 – 13
- Service Dispatch Process: page 9 – 14
- Service Error Process: page 9 – 16

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## Overview of Service Request and Action Workflows

When your customer calls to report a problem and you enter a service request for that customer, you can have Oracle Service use Oracle Workflow technology in the background to drive the call resolution process. Workflows route information of any type to people both inside and outside of your enterprise, according to business rules you can modify easily. Oracle Service provides two predefined workflows embedded in Oracle Applications:

- Service Request Workflow
- Service Request Action Workflow

These workflows consist of processes that you can view graphically in Oracle Workflow. Each process comprises activities that together represent the flow of information required to drive a service request to resolution. Using Oracle Workflow, you can create additional activities to enhance and customize your workflow process. You can add new attributes (properties that reference information about the service request) to the workflow to be used and maintained by your activities.

You can also use Oracle Workflow to create your own custom workflow processes for each service request or action type. You define relationships between types and workflow processes in the Service Request/Action Types setup window.

In addition to these two workflows, Oracle Service includes a process called Service Request Error Process designed specifically to process errors.

When an error occurs, Oracle Workflow sends a notification that displays details pertaining to an errored workflow process. In addition, you can use the Workflow Monitor to view the status of a workflow process, as well as to perform various administrative operations such as aborting the process or changing the value of a workflow attribute.

### See Also

Service Request and Action Workflow Setup: page 2 – 8

Service Request Workflow: page 9 – 4

Service Request Action Workflow: page 9 – 13

Service Error Process: page 9 – 16

Creating Process Definitions in Oracle Workflow Builder, *Oracle Workflow Guide*

Overview of Notification Handling, *Oracle Workflow Guide*

Workflow Monitor, *Oracle Workflow Guide*

## Service Request Workflow

The Service Request Workflow is initiated when you enter a new service request and assign an employee to handle this request. The Call Support process within this workflow automatically routes the new service request to individuals in the organization for resolution, alerts the supervisor as necessary when the current owner does not respond to the request, and allows the current owner to escalate or transfer the request to the next level of support.

The Service Request Workflow has the following attributes associated with it. These attributes reference information in the Service Request data model and are used and maintained by activities throughout the process:

Display Name	Description	Type	Length/ Format
Initiator Role	Workflow role name of process initiator	Text	100
User ID	Initiator's application user identifier	Number	
Resp ID	Initiator's responsibility identifier	Number	
Resp Appl ID	Initiator's application identifier	Number	
Workflow Administrator Role	Workflow role name of Oracle Service workflow administrator	Text	100
Request ID	Internal identifier of the service request	Number	
Request Number	User-visible identifier of the service request	Text	64
Request Date	Service request date	Date	DD-MON- YYYY HH24:MI:SS
Request Type	Service request type	Text	30
Escalation History	Escalation history	Text	2000
Escalation Comment	Optional escalation comment provided by owner	Text	2000
Last Escalation Comment	Last escalation comment	Text	2000
Request Status	Service request status	Text	30
Request Severity	Service request severity	Text	30
Request Urgency	Service request urgency	Text	30
Owner ID	Employee ID of current owner	Number	
Owner Name	Name of current owner	Text	240

Display Name	Description	Type	Length/ Format
Owner Role	Workflow role name of current owner	Text	100
Request Summary	Service request summary	Text	80
Request Customer	Customer who made the request	Text	50
Inventory Item ID	Inventory item ID from item master	Number	
Product Description	Product description	Text	240
Customer Product ID	Customer product ID from installed base	Number	
Problem Description	Problem description	Text	2000
Expected Resolution Date	Expected resolution date of request	Date	DD-MON- YYYY
Response Deadline	Deadline by which owner must respond to notification	Date	DD-MON- YYYY HH24:MI:SS
Supervisor ID	Employee ID of current owner's supervisor	Number	
Supervisor Name	Name of current owner's supervisor	Text	240
Supervisor Role	Workflow role name of current owner's supervisor	Text	100
Previous Owner ID	Employee ID of previous owner	Number	
Previous Owner Name	Name of previous owner	Text	240
Previous Owner Role	Workflow role name of previous owner	Text	100

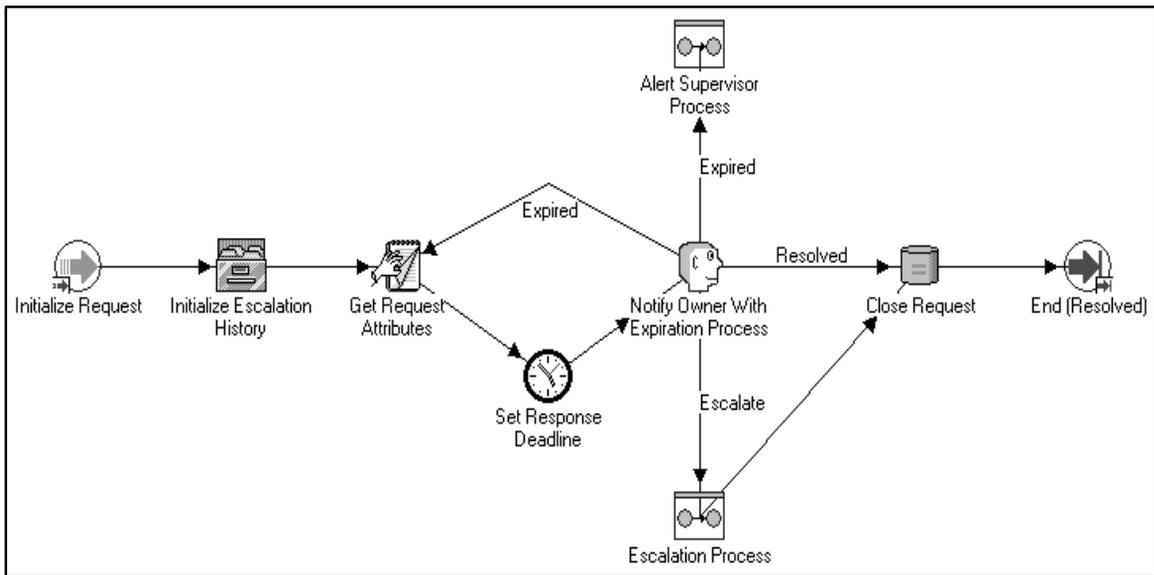
---

## Call Support Process

When the Call Support process begins, it identifies information about the service request, such as the service request number and the request's owner. It then sets a response date that serves as a deadline by which the owner must respond, and sends an assignment notification to the owner. If the owner does not respond before the response deadline, the process sends a notification to alert the owner's supervisor, sets a new response deadline, and resends the assignment notification to the owner. This continues until the owner takes action. If the owner resolves the request and responds to the assignment notification with the Resolved result, the process closes the request and ends with a result of Resolved. However, if the owner is unable to

resolve the request and responds to the assignment notification with the Escalate result, the Escalation subprocess looks up the supervisor of the current owner and reassigns the request to the supervisor. It then sets a new response date for the new owner and sends an escalation notification to that individual. This subprocess continues until the owner resolves the request.

In Oracle Workflow, the Call Support process looks like this and consists of the following subprocesses and activities:



### **Initialize Request Activity**

This activity initializes the workflow attributes that remain constant over the duration of the workflow process.

### **Initialize Escalation History Activity**

This activity initializes the Escalation History. It records the date and time of the first owner assignment in the workflow process.

### **Get Request Attributes Activity**

This activity initializes or updates the workflow attributes with the most current values in the database.

### **Set Response Deadline Activity**

This activity sets the date by which the service request owner must respond to the notification.

### **Notify Owner With Expiration Process**

This subprocess is described in more detail elsewhere. See: Notify Owner With Expiration Subprocess: page 9 – 7.

### **Escalation Process**

This subprocess is described in more detail elsewhere. See: Escalation Subprocess: page 9 – 9.

### **Alert Supervisor Process**

This subprocess is described in more detail elsewhere. See: Alert Supervisor Subprocess: page 9 – 11.

### **Close Request Activity**

This activity closes the service request by setting the status to *Closed*.

### **End (Resolved) Activity**

This activity marks the end of the Call Support process. The process has a result of *Resolved*.

## **See Also**

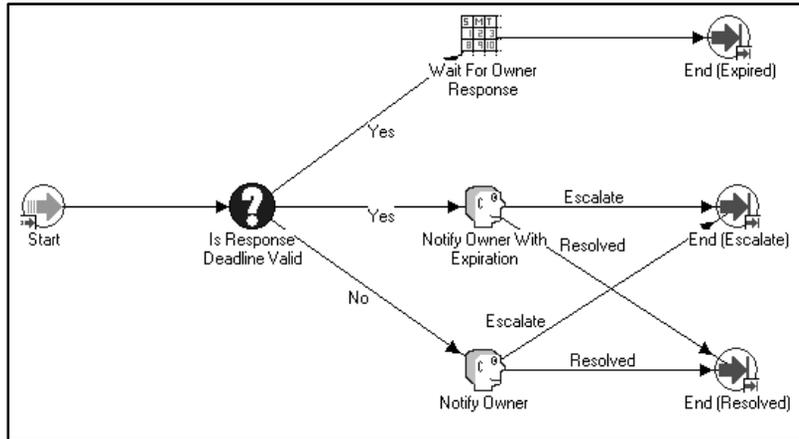
Overview of Service Workflows: page 9 – 2

---

## **Notify Owner With Expiration Subprocess**

The Notify Owner With Expiration subprocess is part of the Call Support process, which in turn is part of the Service Request workflow. It initiates when a new service request is logged or when the service request owner fails to respond before the assignment notification times out.

In Oracle Workflow, the Notify Owner With Expiration subprocess looks like this and consists of the following activities:




---

### **Start Activity**

This is a Standard activity that marks the start of the subprocess.

---

### **Is Response Deadline Valid Activity**

This activity verifies whether the response deadline is valid.

---

### **Wait For Owner Response Activity**

This is a Standard activity that waits until the time specified by the Set Response Deadline activity.

---

### **Notify Owner With Expiration Activity**

This activity notifies the service request owner that a new service request is assigned to him or her, with the note that he or she must respond to this notification before the specified deadline. Otherwise, the supervisor will be alerted.

---

### **Notify Owner Activity**

This activity notifies the service request owner that a new service request is assigned to him or her. The only difference between this and the Notify Owner With Expiration activity is that this activity does not have a response deadline.

## End (Expired, Escalate, Resolved) Activities

These activities mark the end of the subprocess with the result of *Expired*, *Escalate*, or *Resolved*.

### See Also

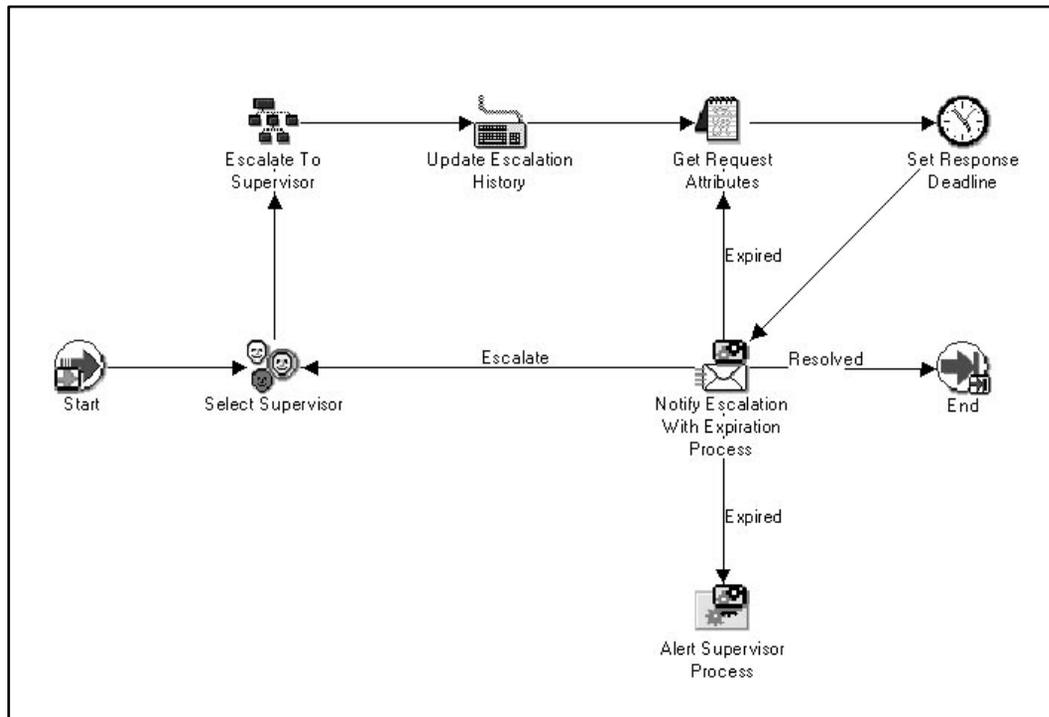
Call Support Process: page 9 – 5

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## Escalation Subprocess

The Escalation subprocess is part of the Call Support process, which in turn is part of the Service Request workflow. It initiates when the owner is unable to resolve the service request and chooses to escalate the service request to the next level of support.

In Oracle Workflow, the Escalation subprocess looks like this and consists of the following subprocesses and activities:



### **Start Activity**

This is a Standard activity that marks the start of the subprocess.

### **Select Supervisor Activity**

This activity looks for the supervisor of the current service request owner.

### **Escalate To Supervisor Activity**

This activity reassigns the service request to the supervisor of the employee who escalated the service request.

### **Update Escalation History Activity**

This activity updates the Escalation History. It records the date and time of the new owner assignment and the escalation comment of the last owner who escalated the request in the workflow process.

### **Get Request Attributes Activity**

This activity updates the workflow attributes with the most current values in the database.

### **Set Response Deadline Activity**

This activity sets the deadline by which the service request owner must respond to the notification.

### **Notify Escalation With Expiration Process**

This subprocess consists of the same activities as the Notify Owner With Expiration subprocess in the Call Support process, except that it sends escalation notifications rather than assignment notifications to the new owner of the escalated service request. See: Notify Owner With Expiration Subprocess: page 9 – 7.

### **Alert Supervisor Process**

This subprocess is described in more detail elsewhere. See: Alert Supervisor Subprocess: page 9 – 11.

## **End Activity**

This activity marks the end of the subprocess.

## **See Also**

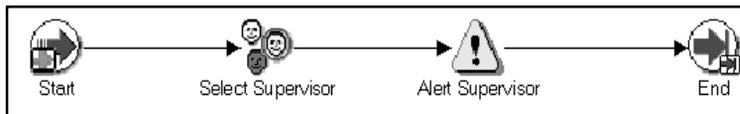
Call Support Process: page 9 – 5

---

## **Alert Supervisor Subprocess**

The Alert Supervisor subprocess is part of the Call Support process, which in turn is part of the Service Request workflow. It initiates when the service request owner fails to respond before the assignment or escalation notification times out.

In Oracle Workflow, the Alert Supervisor subprocess looks like this and consists of the following activities:



## **Start Activity**

This is a Standard activity that marks the start of the subprocess.

## **Select Supervisor Activity**

This activity looks for the supervisor of the current service request owner.

## **Alert Supervisor Activity**

This activity notifies the supervisor that the service request owner has failed to take action before the response deadline.

## **End Activity**

This activity marks the end of the subprocess.

## See Also

Call Support Process: page 9 – 5

## Service Request Action Workflow

The Service Request Action Workflow is initiated when you enter a new action for a service request and dispatch field personnel to handle the request. The Service Dispatch process automatically routes the service request to individuals in the organization for resolution. It also notifies and instructs appropriate service personnel who need to be dispatched to a field site.

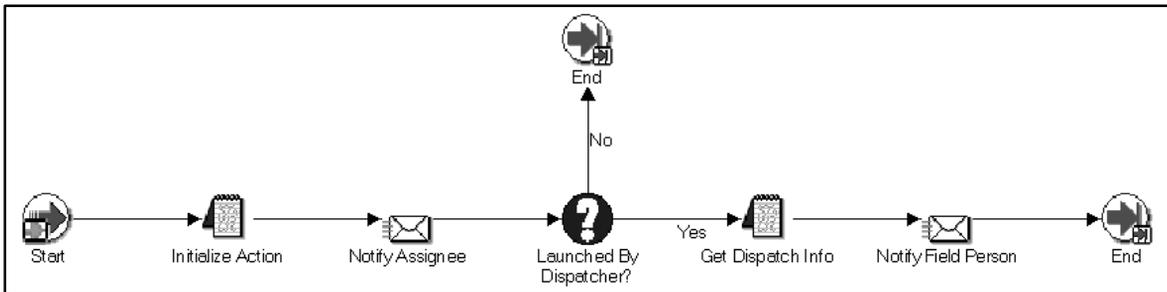
The Service Request Action Workflow has the following attributes associated with it. These attributes reference information in the Service Request data model and are used and maintained by activities throughout the process:

Display Name	Description	Type	Length/ Format
Initiator Role	Workflow role name of process initiator	Text	100
User ID	Initiator's application user identifier	Number	
Resp ID	Initiator's responsibility identifier	Number	
Resp Appl ID	Initiator's application identifier	Number	
Workflow Administrator Role	Workflow role name of Oracle Service workflow administrator	Text	100
Dispatch Workflow Flag	Whether process is initiated from Engineer Selection and Dispatch window	Text	1
Request ID	Internal identifier of service request	Number	
Request Action ID	Internal identifier of service request action	Number	
Request Number	User-visible identifier of service request	Text	64
Action Number	User-visible identifier of action	Number	
Action Date	Action start date	Date	
Action Type	Action type	Text	30
Action Status	Action status	Text	30
Action Severity	Action severity	Text	30
Assignee ID	Employee ID of current assignee	Number	
Assignee Role	Name of current assignee	Text	240
Assignee Role	Workflow role name of current assignee	Text	100
Action Summary	Action summary	Text	240

Display Name	Description	Type	Length/ Format
Request Customer	Customer who made the request	Text	50
Inventory Item ID	Inventory item ID from item master	Number	
Product Description	Product description	Text	240
Customer Product ID	Customer product ID from installed base	Number	
Request Location	Service request location	Text	40
Action Description	Action description	Text	2000
Expected Resolution Date	Expected resolution date of action	Date	
Dispatched Personnel Orig System ID	ID of dispatched personnel in original repository table	Number	
Dispatched Personnel Orig System	Code that identifies original repository table	Text	14
Dispatched Personnel Name	Name of dispatched personnel	Text	240
Dispatched Personnel Role	Workflow role name of dispatched personnel	Text	100

## Service Dispatch Process

In Oracle Workflow, the Service Dispatch process looks like this and consists of the following activities:



### Start Activity

This is a Standard activity that marks the start of the process.

### **Initialize Action Activity**

---

This activity initializes the workflow attributes with the most current values in the database.

### **Notify Assignee Activity**

---

This activity notifies the service request action assignee that a new action is assigned to him or her.

### **Launched By Dispatcher? Activity**

---

This activity determines whether the workflow process has been launched from the Engineer Selection and Dispatch window.

### **Get Dispatch Info Activity**

---

This activity initializes the workflow attributes with information about the field personnel who need to be dispatched to a field site.

### **Notify Field Person Activity**

---

This activity notifies the field personnel that they are dispatched for a service request.

### **End (Error, Complete) Activity**

---

This activity marks the end of the Service Dispatch process.

## **See Also**

Dispatching Service Personnel: page 6 – 6

Service Request Action Workflow: page 9 – 13

## Service Request Error Process

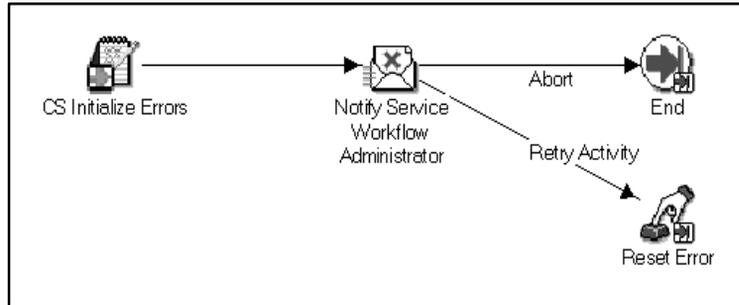
You can optionally specify an error process activity to execute if an error occurs in your workflow process. Oracle Service includes an error process designed specifically for error processing called *Service Request Error Process*. It is a customized version of Oracle Workflow's *Default Error Process* and serves as a demonstration of how the Default Error Process can be enhanced to handle errors in your workflow process. You can customize the Service Request Error Process or create your own custom error processes using the activities provided by Oracle Workflow.

Oracle Workflow executes the Service Request Error Process when an error occurs in the Call Support or Service Dispatch process. The Service Request Error Process sends a message called *Service Request Error Message* to notify the Oracle Service workflow administrator that an error has occurred. The Service Request Error Message provides information associated with the errored activity, such as the error message raised by the errored activity and the error stack. The workflow administrator can open a Web browser from the Notifications window to connect to the Workflow Monitor, which displays detailed status information about process activities. After reviewing the error, the workflow administrator can fix the problem that has caused the error (for example, create a workflow role for an employee), then respond to the Service Request Error Message with the result *Retry Activity* to have Oracle Workflow rerun the original errored activity after the error process completes. Alternatively, the workflow administrator can choose to abort the errored process and cancel any outstanding notifications. To end the process, the workflow administrator should respond to the Service Request Error Message with the result *Abort*.

In addition to the standard attributes, Oracle Service has created two attributes to be used by the Service Request Error Process:

Display Name	Description	Type	Length/ Format
CS Workflow Administrator	Oracle Service workflow administrator role name	Text	100
CS Monitor URL	URL for Workflow Monitor	URL	

In Oracle Workflow, the Service Request Error process looks like this and consists of the following activities:



---

### **CS Initialize Errors Activity**

This activity initializes the attributes associated with the error.

---

### **Notify Service Workflow Administrator Activity**

This activity notifies the Oracle Service workflow administrator that an error has occurred in a workflow process.

---

### **Reset Error Activity**

This activity re-executes the errored activity and continues execution of the process from that errored activity.

---

### **End Activity**

This activity marks the end of the error process.

## **See Also**

Overview of Service Request Workflows: page 9 – 2



CHAPTER

# 10

## Reports

**T**his chapter tells you everything you need to know about the following Oracle Service reports:

- Customer Products Summary Report: page 10 – 2
- Expiring Services Report: page 10 – 3
- Orders Interface Report: page 10 – 4
- Repair Charge Report: page 10 – 5
- Service Request Detail Report: page 10 – 6
- Service Request Summary Report: page 10 – 8

---

## Customer Products Summary Report

Use the Customer Products Summary Report to view product information by customer. This report provides a summary of customer product information, including product number/product description, current serial number/reference number, unit of measure/revision number, quantity, system/status, original order number/purchase order number, and service coverage indicator.

The Customer Products Summary Report is sorted by customer number, then install location, and then product number. The report will page break for each customer and install location.

---

### Submission

In the Submit Request window, select Customer Products Summary Report in the Request Name field.

---

### Parameters

When you request a Customer Products Summary Report, Oracle Service provides you with the following parameters. If you leave any parameters blank, this report includes all customers and their corresponding products.

#### **Customer Number From/To**

Select a customer number or range to print on this report.

#### **Item From/To**

Select an item or range to print on this report.

#### **Installed Location**

Select an installed location to print on this report.

#### **Status**

Select a customer product status to print on this report.

---

## Expiring Services Report

Use the Expiring Services Report to view expiring service programs and warranties. This report provides a summary of service information including customer, start and end date of service, product/serial number, reference number, install location, and renewal eligibility indicator.

The Expiring Services Report is sorted by service and then customer number. The report will page break for each new service or customer.

---

### Submission

In the Submit Request window, select Expiring Services Report in the Request Name field.

---

### Parameters

When you request an Expiring Services Report, Oracle Service provides you with the following parameters. If you leave any parameters blank, this report includes all services and their corresponding customers.

#### **Customer Number From/To**

Select a customer number or range to print on this report.

#### **Item From/To**

Select a serviceable item or range to print on this report.

#### **Service From/To**

Select a service program or range to print on this report.

#### **Service End Date From/To**

Select an end date range from the calendar displayed within the list of available values.

#### **Installed Location**

Select an installed location to print on this report.

---

## Orders Interface Report

Use the Orders Interface Report to view new order data recently transferred to Oracle Service from Order Entry/Shipping. You should run the Service Interface concurrent program before submitting this report.. Once you have run AutoCreate Installed Base successfully, you can no longer view the results of the data transfer of new orders from Order Entry/Shipping.

**Note:** A System Administrator would typically use this report.

The Orders Interface Report is sorted first by transaction code, then order number. The report's output will begin a new page when any of the following items change: transaction code, order number, customer, or ship-to customer.

---

### Submission

In the Submit Request window, select Orders Interface Report in the Request Name field.

---

### Parameters

When you request an Orders Interface Report, Oracle Service provides you with the following parameters. If you leave any parameters blank, this report includes all new orders recently transferred by the Service Interface. It is recommended that you run the full report.

---

#### **Transaction Code**

Select the transaction code to print on this report. Note that the available transaction codes are based on what has been transferred to Service from Order Entry/Shipping.

---

#### **Order Number**

Select the order number to print on this report.

---

# Repair Charge Report

Use the Repair Charge Report to view charges (estimates) generated for service requests or depot repair lines.

The Repair Charge Report is sorted by estimate number and will page break for each new number.

---

## Submission

In the Submit Request window, select Repair Charge Report in the Request Name field.

---

## Parameters

When you request a Repair Charge Report, Oracle Service provides you with the following parameters. If you leave any parameters blank, this report includes all charges for all customers.

### **Estimate Number Low/High**

Select an estimate number or range to print on this report.

### **Customer Number From/To**

Select a customer number or range to print on this report.

### **Item From/To**

Select an item or range to print on this report.

### **RMA Number Low/High**

Select an RMA number or range to print on this report.

### **Serial Number**

Select a serial number to print on this report.

### **RMA Line Number**

Select a line number for the RMA

---

## Service Request Detail Report

Use the Service Request Detail Report to view service request information such as actions, resolution date, resolution codes, action assignee, action status, type, urgency, and severity.

The Service Request Detail Report is sorted by service request number and begins a new page for each new number.

---

### Submission

In the Submit Request window, select Service Request Detail Report in the Request Name field.

---

### Parameters

When you request a Service Request Detail Report, Oracle Service provides you with the following parameters. If you leave the parameters blank, this report includes all service requests.

#### **Customer Number Low/High**

Select a customer or range to print on this report.

#### **Item Low/High**

Select an item or range to print on this report.

#### **Request Number Low/High**

Select a service request number or range to print on this report.

#### **Type**

Select a service request type to print on this report.

#### **Severity**

Select a severity to print on this report.

**Urgency**

---

Select a request urgency to print on this report.

**Problem Code**

---

Select a problem code to print on this report.

**Resolution Code**

---

Select a resolution code to print on this report.

**Status**

---

Select a service request or action status to print on this report.

**Owner**

---

Select a service request owner to limit which requests will print.

**Closed Date**

---

Enter a date to limit which requests will print.

**Logged By**

---

Select the person who logged the requests you want to view on the report.

**Closed Flag**

---

Select whether to print closed or open requests on this report.

**Install Location**

---

Selected the installed location to print on this report.

---

## Service Request Summary Report

Use the Service Request Summary Report to view summary information about your service requests, including customer, product and serial number, reference number, installed location, type, urgency, and severity.

The Service Request Summary Report is sorted by service request number and begins a new page for each new number.

---

### Submission

In the Submit Request window, select Service Request Summary Report in the Request Name field.

---

### Parameters

When you request a Service Request Summary Report, Oracle Service provides you with the following parameters. If you leave the parameters blank, this report includes all service requests.

#### **Customer Number Low/High**

Select a customer or range to print on this report.

#### **Item Low/High**

Select an item or range to print on this report.

#### **Request Number Low/High**

Select a service request number or range to print on this report.

#### **Type**

Select a service request type to print on this report.

#### **Severity**

Select a severity to print on this report.

**Urgency**

---

Select a request urgency to print on this report.

**Problem Code**

---

Select a problem code to print on this report.

**Resolution Code**

---

Select a resolution code to print on this report.

**Status**

---

Select a service request or action status to print on this report.

**Owner**

---

Select a service request owner to limit which requests will print.

**Closed Date**

---

Enter a date to limit which requests will print.

**Logged By**

---

Select the person who logged the requests you want to view on the report.

**Closed Flag**

---

Select whether to print closed or open requests on this report.

**Install Location**

---

Selected the installed location to print on this report.



APPENDIX

A

# Windows and Navigator Paths

## Service Windows and Navigator Paths

For windows described in other manuals:

See...	Refer to this manual for a complete window description.
<b>AR</b>	<i>Oracle Receivables User's Guide</i>
<b>MRP</b>	<i>Oracle Master Scheduling/MRP and Oracle Supply Chain Planning User's Guide</i>
<b>OE</b>	<i>Oracle Order Entry/Shipping User's Guide</i>
<b>QA</b>	<i>Oracle Quality User's Guide</i>
<b>WF</b>	<i>Oracle Workflow Guide</i>
<b>User</b>	<i>Oracle Applications User's Guide</i>

Although your system administrator may have customized your navigator, typical navigational paths include the following:

Text in brackets ([ ]) indicates a button.

Window Name	Navigation Path
Action Audit History 5 – 37	Service Request Tracking > Enter Service Requests > [Actions] > [Audit History]
Actions 5 – 35	Service Request Tracking > Enter Service Requests > [Actions]
Additional Transaction Information 4 – 17	Service Programs > Customer Product Services > [Find] > [Open] > [Transactions] > [Details]
	Service Programs > Customer Product Services > [Find] > [Transactions] > [Details]
Approval 7 – 19	Depot Repair > Repairs > [Approval]
Audit History 3 – 39	Installed Base > Customer Products > [Audit]
Calls 5 – 31	Service Request Tracking > Enter Service Requests > [Calls]
	Service Request Tracking > View Service Requests > [Find] > [Calls]
Change Organization (see <b>MRP</b> )	Other > Organization

Window Name	Navigation Path
Charges 8 – 3	Depot Repair > Repairs > [Charges]
	Service Request Tracking > Enter Service Requests > [Charges]
Comments 5 – 25	Depot Repair > Repairs > [Find] > Special menu > Comments
	Installed Base > Customer Products > Special menu > Comments
	Service Request Tracking > Enter Service Requests > [Comments]
	Service Request Tracking > Enter Service Requests > Special menu > Search Knowledge Base > [Find] > [Notes]
	Service Request Tracking > Knowledge Base Search > [Find] > [Notes]
	Service Request Tracking > View Service Requests > [Find] > [Comments]
	Service Request Tracking > View Service Requests > [Find] > Special menu > Search Knowledge Base > [Find] > [Notes]
Copy Systems 3 – 51	Installed Base > Systems > [Copy Systems]
Call Followup Type QuickCodes 2 – 44	Setup > Service Request Tracking > Call Followup Types
Call Type QuickCodes 2 – 43	Setup > Service Request Tracking > Call Types
Customer Coterminate Date 4 – 13	Setup > Service Programs > Customer Coterminate Date
Customer Product Split 3 – 45	Installed Base > Customer Products > Special menu > Split Products
Customer Product Statuses 2 – 18	Setup > Installed Base > Customer Product Statuses
Customer Product Types 2 – 20	Setup > Installed Base > Customer Product Types
Customer Products 3 – 28	Installed Base > Customer Products
Customers (see <b>AR</b> )	Customer > Enter
Define Customer Products 3 – 25	Installed Base > Define Customer Products
Diagnosis Codes 2 – 53	Setup > Depot Repair > Repair Diagnosis Codes
Dispatch Rules 2 – 51	Setup > Dispatch > Dispatch Rules
Engineer Selection and Dispatch 6 – 6	Service Request Tracking > Enter Service Requests > [Actions] > [Dispatch]

<b>Window Name</b>	<b>Navigation Path</b>
	Service Request Tracking > View Service Requests > [Find] > [Actions] > [Dispatch]
Enter Quality Results (See <b>QA</b> )	Service Request Tracking > Enter Service Requests > Special menu > Enter Quality Results
	Service Request Tracking > View Service Requests > [Find] > Special menu > Enter Quality Results
Find Orders (See <b>OE</b> )	Customer > Orders, Returns
Find Requests (See <b>User</b> )	Help menu > View My Requests
	Other > View Requests
History 7 – 21	Depot Repair > Repairs > [History]
Included Items 3 – 35	Installed Base > Customer Products > Special menu > Included Items
Knowledge Base Search Results 5 – 22	Service Request Tracking > Enter Service Requests > Special menu > Search Knowledge Base > [Find]
	Service Request Tracking > Knowledge Base Search > [Find]
	Service Request Tracking > View Service Requests > [Find] > Special menu > Search Knowledge Base > [Find]
Message Action Request QuickCodes 2 – 42	Setup > Service Request Tracking > Message Action Requests
Notifications Summary (See <b>WF</b> )	Service Request Tracking > Workflow Notifications
Order Service Programs 4 – 26	Service Programs > Order Service > [Customer Products]
Order Transaction Types 2 – 22	Setup > Installed Base > Order Transaction Types
ORDER 8 – 10	Depot Repair > Repairs > [Charges] > [Submit Order]
	Service Request Tracking > Enter Service Requests > [Charges] > [Submit Order]
Orders Summary (See <b>OE</b> )	Customer > Orders, Returns
Personal Profile Values (see <b>User</b> )	Other > Profiles
Reject Repair Reasons QuickCodes 2 – 54	Setup > Depot Repair > Reject Repair Reasons
Renew Service Programs 4 – 30	Service Programs > Renew Service > [Customer Products]
Renew Service Reason QuickCodes 2 – 30	Setup > Service Programs > Renewal Reasons

<b>Window Name</b>	<b>Navigation Path</b>
Repair Jobs 7 – 24	Depot Repair > Repairs Jobs
Repairs 7 – 13	Depot Repair > Repairs
Request Problem Code QuickCodes 2 – 40	Setup > Service Request Tracking > Problem Codes
Request Resolution Code QuickCodes 2 – 41	Setup > Service Request Tracking > Resolution Codes
Return Item 7 – 22	Depot Repair > Repairs > Special menu > Return Item
Returns (See OE)	Customer > Orders, Returns > [New Return]
Revisions 3 – 40	Installed Base > Customer Products > [Revisions]
Search Knowledge Base 5 – 22	Service Request Tracking > Enter Service Requests > Special menu > Search Knowledge Base
	Service Request Tracking > Knowledge Base Search
	Service Request Tracking > View Service Requests > [Find] > Special menu > Search Knowledge Base
Send Message 5 – 27	Depot Repair > Repairs > [Find] > Special menu > Send Message
	Depot Repair > Repairs > [Find] > [Charges] > Special menu > Send Message
Service Availability 2 – 28	Setup > Service Programs > Service Availability
Service Coverage 8 – 9	Depot Repair > Repairs > [Charges] > [Coverage]
	Service Request Tracking > Enter Service Requests > [Charges] > [Coverage]
Service Coverages 2 – 27	Setup > Service Programs > Service Coverages
Service Groups 2 – 48	Setup > Dispatch > Service Groups
Service Parameters 2 – 16	Setup > Service Parameters
Service Request Audit History 5 – 33	Service Request Tracking > Enter Service Requests > [Audit History]
Service Request Links 5 – 34	Service Request Tracking > Enter Service Requests > [Links]
Service Request Urgencies 2 – 35	Setup > Service Request Tracking > Urgencies
Service Request/Action Severities 2 – 34	Setup > Service Request Tracking > Request/Action Severities
Service Request/Action Statuses 2 – 33	Setup > Service Request Tracking > Request/Action Statuses

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# Glossary

**action** A user-initiated step taken to resolve an incident.

**alphanumeric number type** An option for numbering documents, employees, and suppliers where assigned numbers can contain letters as well as numbers.

**alternate bill of material** An alternate list of component items you can use to produce an assembly.

**alternate routing** An alternate manufacturing process you can use to produce an assembly.

**alternate unit of measure** All other units of measure defined for an item, excluding the primary unit of measure.

**ANSI** American National Standards Institute which establishes national standards for the United States. The parent organization for X12 and also serves as the North American representative to ISO (International Standards Organization).

**application building block** A set of tables and modules (forms, reports, and concurrent programs) that implement closely-related entities and their processing.

**approve** An action you take to indicate that you consider the contents of the purchasing document to be correct. If the document passes the submission tests and you have sufficient authority, Purchasing approves the document.

**assembly completion pull transaction** A material transaction where you backflush components from inventory to work in process as you complete the operation where the component is consumed. *See operation completion pull transaction.*

**assembly completion transaction** A material transaction where you receive assemblies into inventory from a job or schedule upon completion of the manufacture of the assembly.

**assembly scrap transaction** A move transaction where you charge a scrap account as you move assemblies into a Scrap intraoperation step. This reduces the value of your discrete job.

**asset item** Anything you make, purchase, or sell including components, subassemblies, finished products, or supplies which carries a cost and is valued in your asset subinventories.

**asset subinventory** Subdivision of an organization, representing either a physical area or a logical grouping of items, such as a storeroom where quantity balances are maintained for all items and values are maintained for asset items.

**ATT** *See available to transact.*

**Available To Transact (ATT)** Quantity on hand less all reservations for the item which may be transferred within or out of inventory.

**backflush operation** A routing operation where you backflush component items.

**backflush transaction** A material transaction that automatically issues component items into work in process from inventory when you move or complete the assembly. Also known as post-deduct or pull. *See pull transaction*

**bill of material** A list of component items associated with a parent item and

information about how each item relates to the parent item. Oracle Manufacturing supports standard, model, option class, and planning bills. The item information on a bill depends on the item type and bill type. The most common type of bill is a standard bill of material. A standard bill of material lists the components associated with a product or subassembly. It specifies the required quantity for each component plus other information to control work in process, material planning, and other Oracle Manufacturing functions. Also known as **product structures**.

**bill-to address** The customer's billing address. It is also known as **invoice-to address**. It is used as a level of detail when defining a forecast. If a forecast has a bill-to address associated with it, a sales order only consumes that forecast if the bill-to address is the same.

**bill/routing reference** A bill or routing you assign to non-standard discrete jobs. You use the bill reference to create the material requirements for the job. You use the routing reference to create the routing for the job.

**BOM item type** An item classification that determines the items you can use as components in a bill of material. BOM Item types include standard, model, option class, and planning items.

**business application** Software that performs a particular business function or group of functions (accounts payable, for example).

**business document** A document used for conducting business between two trading partners — a purchase order or invoice, for example.

**business purpose** The function a particular customer location serves. For example, you would assign the business purpose of Ship

To an address if you ship to that address. If you also send invoices to that address, you could also assign the business purpose Bill To. Each customer location must serve at least one function.

**cancelled job** A discrete job you no longer want to work on. You cannot make transactions, move assemblies, or apply or update costs.

**closed job** A discrete job that is unavailable for charges or any type of transaction. Closing a job calculates final costs and variances and creates history for the job.

**column headings** Descriptions of the contents of each column in the report.

**committed amount** The amount you agree to spend with a supplier.

**common bill of material** An assembly that uses the bill of material of another assembly as its bill. This enables you to reduce your maintenance effort by sharing the same bill structure among two or more assemblies. For example, if you have identical bills of material that produce the same product in two different organizations, you can define common bills of material for the identical structures.

**common routing** A routing that uses the routing of another assembly as its routing. This enables you to reduce your maintenance effort by sharing the same routing and operations for two or more assemblies.

**completed job** A discrete job whose quantity planned equals the number of assemblies actually completed.

**completion date** The date you plan to complete production of the assemblies in a discrete job.

**completion locator** An inventory location within a completion subinventory where you receive completed assemblies from work in process.

**completion subinventory** An inventory location at the end of your production line where you receive completed assemblies from work in process. Often this is the supply subinventory for subassemblies or finished goods inventories for final assemblies.

**component** A serviceable item that is a part or feature in another serviceable item. Your customers cannot report service requests against this type of serviceable item directly. You can reference components when you enter service requests against actual end item-type serviceable items, or products. For example, if you define three inventory items, A, B, and C, where A and B are products (end item-type serviceable items) but C is a component (non-end item-type serviceable item) of A, you can enter service requests against A and B directly, but not against C. When you enter a service request against product A, you can reference C because it is a component of A. *See also standard component.*

**component item** An item associated with a parent item on a bill of material.

**concurrent manager** Components of your applications concurrent processing facility that monitor and run time-consuming tasks for you without tying up your terminal. Whenever you submit a request, such as running a report, a concurrent manager does the work for you, letting you perform many tasks simultaneously.

**concurrent process** A task in the process of completing. Each time you submit a task, you create a new concurrent process. A

concurrent process runs simultaneously with other concurrent processes (and other activities on your computer) to help you complete multiple tasks at once with no interruptions to your terminal.

**concurrent queue** A list of concurrent requests awaiting completion by a concurrent manager. Each concurrent manager has a queue of requests waiting in line. If your system administrator sets up simultaneous queuing, your request can wait to run in more than one queue.

**concurrent request** A request to complete a task for you. You issue a request whenever you submit a task, such as running a report. Once you submit a task, the concurrent manager automatically takes over for you, completing your request without further involvement from you, or interruption to your work. Concurrent managers process your request according to when you submit the request and the priority you assign to your request. If you do not assign a priority to your request, your application prioritizes the request for you.

**configuration** A product a customer orders by choosing a base model and a list of options. It can be shipped as individual pieces as a set (kit) or as an assembly (configuration item).

**configuration bill of material** The bill of material for a configuration item.

**configuration item** The item that corresponds to a base model and a specific list of options. Bills of Material creates a configuration item for assemble-to-order models.

**configurator** A form that allows you to choose options available for a particular model, thus defining a particular configuration for the model.

**configure-to-order** An environment where you enter customer orders by choosing a base model and then selecting options from a list of choices.

**cotermination** Setting the same end date for all ordered or renewed service programs.

**current date** The present system date.

**customer location** See **customer address**.

**customer product** An entity that identifies a serviceable item or customer product. The customer product identifies not only the product and the customer, but also the product quantity, the product's serial number (if the product is under serial number control and has been assigned a serial number), the location of the product, the various contacts, such as service administration, support, and bill-to associated with the product. A customer may have several of the same customer products.

**customer site** A specific area or place, such as a building or a floor on a building, at a customer address. A customer address may have one or more related customer sites.

**database diagram** A graphic representation of application tables and the relationships among them.

**database view** Provides access to an underlying database table. You do not need to know how the data is stored to use a database view. There are two types associated with Oracle Quality: the collection plan results and the collection import results database views.

**delayed service order** An order for service against existing customer products. The service order is 'delayed' because service is ordered later than the product is ordered.

**depot repair** A process used to track items returned by a customer for repair or replacement.

**discrete job** A production order for the manufacture of a specific (discrete) quantity of an assembly, using specific materials and resources, in a limited time. A discrete job collects the costs of production and allows you to report those costs—including variances—by job. Also known as **work order** or **assembly order**.

**discrete manufacturing** A manufacturing environment where you build assemblies in discrete jobs or batches. Different from a repetitive production environment where you build assemblies on production or assembly lines at a daily rate.

**engineering change order (ECO)** A record of revisions to one or more items usually released by engineering.

**entity** A data object that holds information for an application.

**event alert** An alert that runs when a specific event occurs that you define. For example, you can define an event alert to immediately send a message to the buyer if an item is rejected on inspection.

**expense item** Anything you make, purchase, or sell including components, subassemblies, finished products, or supplies and that does not carry a cost. Also known as a non-asset item.

**expense subinventory** Subdivision of an organization, representing either a physical area or a logical grouping of items, such as a storeroom where no value exists but the quantities may be tracked.

**finished good** Any item subject to a customer order or forecast. See also **product**

**flexfield segment** One of the parts of your key flexfield, separated from the other parts by a symbol you choose (such as -, /, or \). Each segment typically represents a cost center, company, item family, or color code.

**freight carrier** A commercial company used to send item shipments from one address to another.

**incident** An entry logged in Oracle Service to record a customer's request for product service. You can log a different incident for each issue a customer reports including questions about products, problems using the products, requests for preventive maintenance, and requests for service contract renewals.

**included item** A standard mandatory component in a bill, indicating that it ships (if shippable) whenever its parent item is shipped. Included items are components of models, kits, and option classes.

**inspection** A procedure you perform to ensure that items received conform to your quality standards. You can use inspections to prevent payment for goods and services that fail to meet your quality standards.

**inventory item** Items you stock in inventory. You control inventory for inventory items by quantity and value. Typically, the inventory item remains an asset until you consume it. You recognize the cost of an inventory item as an expense when you consume it or sell it. You generally value the inventory for an item by multiplying the item standard cost by the quantity on hand.

**inventory organization** An organization that tracks inventory transactions and balances, and/or that manufactures or distributes products.

**inventory transaction** A record of material movement. The basic information for a transaction includes the item number, the quantity moved, the transaction amount, the accounting flexfields, and the date. *See material transaction*

**issue transaction** A material transaction to issue component items from inventory to work in process.

**item** Anything you make, purchase, or sell, including components, subassemblies, finished products, or supplies. Oracle Manufacturing also uses items to represent planning items that you can forecast, standard lines that you can include on invoices, and option classes you can use to group options in model and option class bills.

**item attribute control level** To maintain item attributes at the item master attribute level or the organization specific level by defining item attribute control consistent with your company policies. For example, if your company determines serial number control at headquarters regardless of where items are used, you define and maintain serial number attribute control at the item master level. If each organization maintains serial number control locally, they maintain those attributes at the organization specific level.

**item master level attribute** An item attribute you control at the item master level as opposed to controlling at the organization level.

**item sequence** The sequence of the component item on the bill of material used to sort components on reports.

**item specification** *See specification type.*

**item status** Code used to control the transaction activity of an item.

**job status** An Oracle Manufacturing function that lets you describe various stages in the life cycle of a discrete job and control activities that you can perform on the job.

**kit** An item that has a standard list of components (or included items) you ship when you process an order for that item. A kit is similar to a pick-to-order model because it has shippable components, but it has no options and you order it directly by its item number, not using the configuration selection screen.

**locator** Physical area within a subinventory where you store material, such as a row, aisle, bin, or shelf.

**lot** A specific batch of an item identified by a number.

**lot control** An Oracle Manufacturing technique for enforcing use of lot numbers during material transactions thus enabling the tracking of batches of items throughout their movement in and out of inventory.

**mandatory component** A component in a bill that is not optional. Bills of Material distinguishes required components from options in model and option class bills of material. Mandatory components in pick-to-order model bills are often referred to as included items, especially if they are shippable.

**mass change order** A record of a plan to replace, delete, or update one or more component items in many bills of material at the same time.

**material transaction** Transfer between, issue from, receipt to, or adjustment to an inventory organization, subinventory, or locator. Receipt of completed assemblies into inventory from a job or repetitive schedule.

Issue of component items from inventory to work in process.

**model bill of material** A bill of material for a model item. A model bill lists option classes and options available when you place an order for the model item.

**model item** An item whose bill of material lists options and option classes available when you place an order for the model item.

**module** A program or procedure that implements one or more business functions, or parts of a business function in an application. Modules include forms, concurrent programs, and subroutines.

**non-standard discrete job** A type of discrete job that controls material and resources and collects costs for a wide variety of miscellaneous manufacturing activities. These activities can include rework, field service repair, upgrade, disassembly, maintenance, engineering prototypes, and other projects. Non-standard jobs do not earn material overhead upon assembly completion.

**non-standard expense job** A type of non-standard job expensed at the close of each accounting period. Typical expense jobs include maintenance and repair.

**numeric number type** An option for numbering documents, employees, and suppliers where assigned numbers contain only numbers.

**on-hand quantity** The physical quantity of an item existing in inventory.

**on hold job/schedule** A job or repetitive schedule not accepting further activity and is therefore untransactable.

**open interface** A Manufacturing function that lets you import or export data from other systems through an open interface. An

example is a bar code reader device accumulating data you later import into your manufacturing system for further processing.

**open requirement** A WIP material requirement you have not yet transacted to a discrete job or repetitive schedule. It equates to the component quantity required less any quantity issued.

**operation** A step in a manufacturing process where you perform work on, add value to, and consume department resources for an assembly.

**operation completion pull transaction** A material transaction where you backflush components from inventory to work in process as you complete the operation where the component is consumed. *See also backflush transaction*

**operation completion transaction** A move transaction from one operation to the next where you have completed building the assembly at that operation. In this process, you can also charge resources and overheads and backflush component items.

**operation sequence** A number that orders operations in a routing relative to each other.

**option** An optional item component in an option class or model bill of material.

**option class bill of material** A bill of material for an option class item that contains a list of related options.

**option class item** An item whose bill of material contains a list of related options.

**option dependent operation** An operation in a model or option class item's routing that appears in a configuration item routing only if the configuration contains an option that references that operation.

**order date** The date an order for goods or services is entered. *See also work order date.*

**organization** A business unit such as a plant, warehouse, division, department, and so on. Order Entry refers to organizations as warehouses on all Order Entry windows and reports.

**organization-specific level attribute** An item attribute you control at the organization level.

**outside processing** Performing work on a discrete job or repetitive schedule using resources provided by a supplier.

**pending** A status where a process or transaction is waiting to be completed.

**physical inventory** A periodic reconciliation of item counts with system on-hand quantities.

**pick list** A report that lists all component requirements sorted by supply type for a particular discrete job, repetitive schedule or production line.

**pick-to-order** A configure-to-order environment where the options and included items in a model appear on pick slips and order pickers gather the options when they ship the order. Alternative to manufacturing the parent item on a work order and then shipping it. Pick-to-order is also an item attribute that you can apply to standard, model, and option class items.

**picking rule** A user-defined set of criteria to define the priorities Order Entry uses when picking items out of finished goods inventory to ship to a customer. Picking rules are defined in Oracle Inventory.

**primary bill of material** A list of the components you most frequently use to

build a product. The primary bill is the default bill for rolling up costs, defining a job, and calculating cumulative item lead times. Master Scheduling/MRP uses this bill to plan your material.

**primary routing** A list of the operations you most frequently perform to build a product. The primary routing is the default routing for defining a job and calculating manufacturing lead times.

**process** A set of Oracle Workflow activities that need to be performed to accomplish a business goal. *See also Account Generator, process activity, process definition.*

**process activity** An Oracle Workflow process modelled as an activity so that it can be referenced by other processes; also known as a subprocess. *See also process.*

**process definition** An Oracle Workflow process as defined in the Oracle Workflow Builder. *See also process.*

**product** A finished item that you sell. *See also finished good.*

**profile option** A set of changeable options that affect the way your applications run. In general, profile options can be set at one or more of the following levels: site, application, responsibility, and user.

**protection level** In Oracle Workflow, a numeric value ranging from 0 to 1000 that represents who the data is protected from for modification. When workflow data is defined, it can either be set to customizable (1000), meaning anyone can modify it, or it can be assigned a protection level that is equal to the access level of the user defining the data. In the latter case, only users operating at an access level equal to or lower than the data's protection level can modify the data. *See also Account Generator.*

**pull transaction** A material transaction that automatically issues component items into work in process from inventory when you move or complete the assembly. Also known as post-deduct or backflush. *See backflush transaction*

**purchased assembly** An assembly that you normally buy.

**purchased item** An item that you buy and receive. If an item is also an inventory item, you may also be able to stock it. *See also inventory item.*

**push transaction** A material transaction to issue component items from inventory to work in process before you manufacture the assembly.

**quantity completed** For an operation on a discrete job or repetitive schedule, the quantity of the assembly that you transacted beyond the Run intraoperation step. For a discrete job or repetitive schedule, the quantity of the assembly that you received into inventory.

**quantity in operation** The quantity of an assembly in an operation on a discrete job or repetitive schedule. This includes the quantities in each of the intraoperation steps.

**quantity issued** The quantity of a component item issued from inventory to a discrete job or repetitive schedule to fulfill a WIP material requirement.

**quantity rejected** The number of items you reject after inspection.

**quantity remaining** The quantity of an assembly remaining to be completed at an operation in a discrete job or repetitive schedule. This is the sum of the quantities in all intraoperation steps at all operations before the current operation, plus the quantities in the Queue and Run intraoperation steps at the current operation.

**queue** An intraoperation step in an operation where assemblies are waiting to be worked on. The default intraoperation step for every operation in a routing.

**reject** An intraoperation step in an operation where you can record assemblies that require rework or need to be scrapped.

**released job/schedule** A discrete job or repetitive schedule that you have signified available to be worked on and transactable.

**renewal order** An order containing service order lines to renew or extend existing services applied to products.

**requisition** See **purchase requisition** and **internal sales order**

**return material authorization (RMA)**  
Permission for a customer to return items. Receivables allows you to authorize the return of your sales orders as well as sales made by other dealers or suppliers, as long as the items are part of your item master and price list.

**revised component** Component changes to an assembly that is a revised item on an ECO.

**revised item** Any item you change on an engineering change order. Revised items may be purchased items, subassemblies, finished goods.

**revised item status** A classification you can use to track and control a revised item's life cycle. Revised item statuses include **Open, Released, Scheduled, Hold, Implemented, and Cancelled**.

**revision** A particular version of an item, bill of material, or routing.

**revision control** An inventory control option that tracks inventory by item revision and forces you to specify a revision for each material transaction.

**revision quantity control** A condition placed on an item that ensures that you always identify an item by its number and its revision. Certain items require tighter controls than other. For instance, you may want to control the quantities you have in inventory for an item by revision. For another item, you may just want to know the quantities you have on hand across all revisions. You keep track of inventory quantities by revision when an item is under revision quantity control. You keep track of inventory quantities by item when an item is not under revision quantity control.

**route sheet** A report that provides full routing, operation, resource, and material requirement details for jobs and repetitive schedules. Typically used to know how, when, where, and who builds an assembly. Also known as traveler.

**routing** A sequence of manufacturing operations that you perform to manufacture an assembly. A routing consists of an item, a

series of operations, an operation sequence, and operation effective dates.

**routing revision** A specific version of a routing that specifies the operations that are active for a date range.

**run** An intraoperation step where you move assemblies that you are working on at an operation.

**scrap** An intraoperation step where you move assemblies that cannot be reworked or completed.

**scrap account** An account that you may use to charge scrap transactions.

**serial number** A number assigned to each unit of an item and used to track the item.

**serial number control** A manufacturing technique for enforcing use of serial numbers during a material transaction.

**serialized unit** The unique combination of a serial number and an inventory item.

**service** A benefit or privilege that can be applied to a product. Oracle Service categorizes the items you define as serviceable, thereby making them serviceable items. You can order or apply service to serviceable items.

**service item** An inventory item used to define a service program or warranty. Service items can be recorded against serviceable products. A synonym for serviceable item is a serviceable product.

**service item feature** A particular service component, such as implementation or telephone support, that you include with a service item. Once you classify an inventory item as a service type item and enter the service program related attributes for it, you can list the specific services your service item includes.

**service material** Material used for the repair and/or maintenance of an assembled product.

**service order** An order containing service order lines. Service may be for new products or for existing, previously ordered products.

**service program** A billable service item. Usually a service that customers purchase in addition to a product's base warranty.

**service person** An employee whose function is to provide support and service to customers. Service person is also a synonym for service specialist.

**serviceable item** An inventory item that your organization supports and services, either directly or through the supplier of the item, regardless of who actually manufactures the item. A serviceable item can be an end item, both an end item and a component or part in other end items, or just a component.

**serviceable item class** A category that groups serviceable items. Each class must be of the type Serialized or Non-Serialized. You can group serialized serviceable items in a serialized serviceable item class; you can group non-serialized serviceable items in a non-serialized serviceable item class. A given item may be the member of only one item class at any given time.

**serviced customer product** An entity that identifies a service your customer has recorded against a particular product installation. If you order service against a product in Oracle Order Entry, Oracle Service automatically links the product and the service being recorded against the product by creating a serviced customer product. A customer product installation may have more than one serviced product.

**serviced installation** A synonym for serviced customer product.

**set of books** A financial reporting entity that partitions General Ledger information and uses a particular chart of accounts, functional currency, and accounting calendar. This concept is the same whether or not the Multi-organization support feature is implemented.

**ship-to address** A location where items are to be shipped.

**ship-to location tolerance** Whether the receiving location must be the same as the ship-to location on the purchase order and whether Purchasing prohibits the transaction, displays a warning message while permitting the transaction, or permits the transaction without a warning.

**spare part** A synonym for service part. It is an inventory item used without modification to replace an original part during the performance of maintenance or repair to a serviceable item or product.

**specification** Describes the requirements of a product in Oracle Quality. You can define specifications for the key characteristics of the products you produce.

**standard bill of material** A bill of material for a standard item, such as a manufactured product or assembly.

**standard costing** A costing method where a predetermined standard cost is used for charging material, resource, overhead, period close, job close, and cost update transactions and valuing inventory. Any deviation in actual costs from the predetermined standard is recorded as a variance.

**standard discrete job** A type of discrete job that controls material and resources for standard production assemblies.

**standard item** Any item that can have a bill or be a component on a bill except planning items, option classes, or models. Standard items include purchased items, subassemblies, and finished products.

**standard operation** A commonly used operation you can define as a template for use in defining future routing operations.

**standard unit cost** The unit cost you may use to cost all material and resource transactions in your inventory and work in process system. This cost represents the expected cost for a component or assembly for a specified interval of time. The basis for standard cost may be the cost history, purchase order history, or predicted changes in future costs.

**start date** The date you plan to begin production of assemblies in a discrete job.

**subassembly** An assembly used as a component in a higher level assembly.

**subinventory** Subdivision of an organization, representing either a physical area or a logical grouping of items, such as a storeroom or receiving dock.

**supply type** A bill of material component field that controls issue transactions from inventory to work in process. Supply types supported by Work in Process include: **Push, Assembly pull, Operation pull, Bulk, Supplier, Phantom, and Based on bill.**

**system** A grouping of customer products.

**to move** An intraoperation step where assemblies can either be completed to a

subinventory or wait to be moved to another operation.

**transaction date** The date you enter and Oracle Manufacturing maintains for any manufacturing transaction. The date must fall within an open accounting period and be greater than the release date for transactions on a discrete job or repetitive schedule.

**transaction manager** A concurrent program that controls your manufacturing transactions.

**transaction worker** An independent concurrent process launched by a transaction manager to validate and process your manufacturing transactions.

**unit of measure** The unit that the quantity of an item is expressed.

**unit of measure class** A group of units of measure and their corresponding base unit of measure. The standard unit classes are Length, Weight, Volume, Area, Time, and Pack.

**unit of measure conversions** Numerical factors that enable you to perform transactions in units other than the primary unit of the item being transacted.

**warranty** A non-billable, zero-monetary service item attached directly to a product at shipment.

**WIP accounting class** A set of accounts that you use to charge the production of an

assembly. You assign accounting classes to discrete jobs and repetitive schedules. Each accounting class includes distribution accounts and variance accounts. Also used in cost reporting.

**WIP move resource** A resource automatically charged to a discrete job or repetitive schedule by a move transaction. Resources are automatically charged when a forward move occurs, or uncharged when a backward move occurs.

**work order date** The date to begin processing the paperwork for the discrete job. This date is offset from the start date by the preprocessing lead time.

**worker** An independent concurrent process that executes specific tasks. Programs using workers to break large tasks into smaller ones must coordinate the actions of the workers.

**Workflow Engine** The Oracle Workflow component that implements a workflow process definition. The Workflow Engine manages the state of all activities, automatically executes functions, maintains a history of completed activities, and detects error conditions and starts error processes. The Workflow Engine is implemented in server PL/SQL and activated when a call to an engine API is made. *See also Account Generator, activity, function, item type.*

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