Oracle® Customer Care

Implementation Guide

Release 11*i*

August, 2000

Part No. A86218-01

Oracle Customer Care Implementation Guide, Release 11*i*

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Contents

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Preface

Welcome to **Oracle Customer Care, Release 11*i***.

This Implementation Guide provides information and instructions to help you set up Oracle Customer Care.

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

Intended Audience

This guide is aimed at the following users:

- Technical Service Representatives (TSR)
- Customer Service Representatives (CSR)
- System Administrators (SA), Database Administrators (DBA), and others with similar responsibility.

This guide assumes you have the following pre-requisites:

1. Understanding of the company business processes.
2. Knowledge of products and services as defined by your marketing policies.
3. Basic understanding of Oracle and Developer/2000.

Structure

This manual contains the following chapters:

“Implementing Customer Care" provides step by step procedure for setting up Oracle Customer Care.

Related Documents

For more information, see the following manuals:

- Oracle Service Implementation Guide
- Oracle Service Concepts and Procedures Guide
- Oracle Support Concepts and Procedures Guide
- Oracle Support Implementation Guide
- Oracle Customer Care Concepts and Procedures Guide

Implementing Customer Care

This section provides general descriptions of the setup and configuration tasks required to successfully implement Oracle Customer Care. This section contains the following topics:

- Setting Up Customer Profile
- Setting up Relationship Plans
- Setting Up Quick Menu
- Profile Options

Setting Up Customer Profile

The Customer Profile module allows users to define their own profile checks, and combine multiple checks with complex criteria. It is also possible to define critical customer criteria by using customer profile checks.

The Customer Profile module provides the following 24 predefined profile checks:

- Open Service Request
- Escalated SRs
- Open Tasks
- Approved Tasks
- Cancelled Tasks
- Rejected Tasks
- Accepted Tasks
- On-Hold Tasks
- Active Contracts
- Entered Contracts
- Terminated Contracts
- Cancelled Contracts
- On-Hold Contracts
- Expired Contracts
- Booked Orders
- Open Orders
- Cancelled Orders
- Open Defects
- Escalated Defects
- Installed Base Size
- Satisfaction
- Loyalty
- Profitability

- Revenue
- Critical Customer

The Customer Profile engine is the part of the Customer Profile module that runs periodically to check and store changes. The engine is a server-side PL/SQL program which can be run as a concurrent program or by clicking the Refresh button on the Profile or the Dashboard tab of the Contact Center. The engine evaluates the following:

- The results of all effective profile check variables.
- Results of all the effective checks based on the variables.
- Results are evaluated for all customers and accounts.

Note: You must use the Customer Support responsibility for performing the setup procedures detailed in this document. Exceptions, if any, are clearly indicated.

Defining Profile Ratings

To define profile ratings:

1. Open the Customer Care Lookups window using the following navigation path:

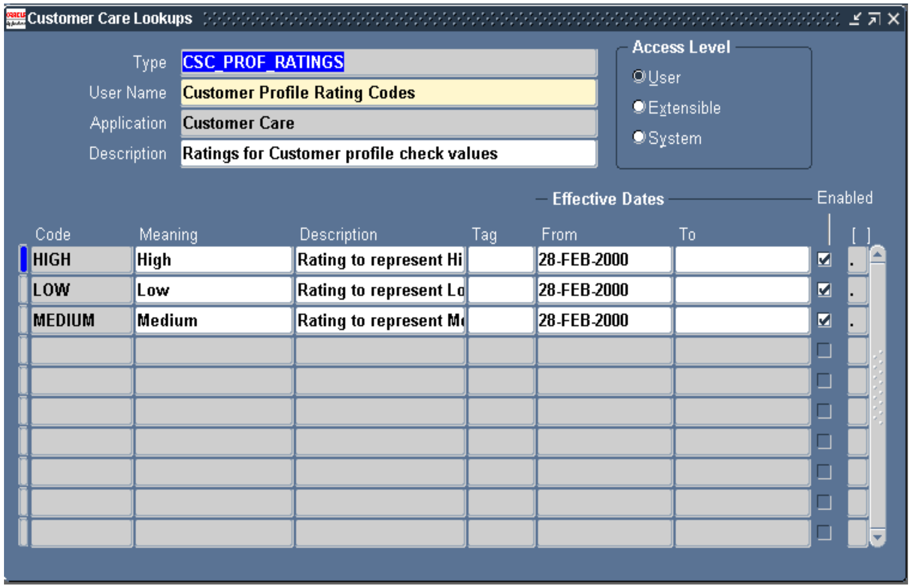
   Setup—> Customer Care Lookups.

2. Open Customer Profile Rating Codes (CSC_PROF_RATINGS) by running a query. Three predefined ratings — High, Medium and Low — are available in the module. You may create new rating codes. To create a new rating code

   a. Click on the Add button on the toolbar

   b. Navigate to the new record and enter the appropriate values for the following fields:

      * Code (mandatory)
      * Meaning (mandatory)
      * Description (optional)
      * Effectivity Dates (optional)



3. Verify that the Enabled check box is selected.
4. Click Save.

Note that you must create rating codes before you can use them in the Customer Profile setup windows.

Defining Profile Variables

A profile variable is the basic information about the customer profile. It includes the SQL statement which is defined to retrieve the Profile value. Other attributes would include table columns to drill down.

To define a profile variable:

1. Open the Customer Care Lookups tab using the following navigation path:

   Setup—>Customer Management—>Customer Profiles—> Profile Variables tab

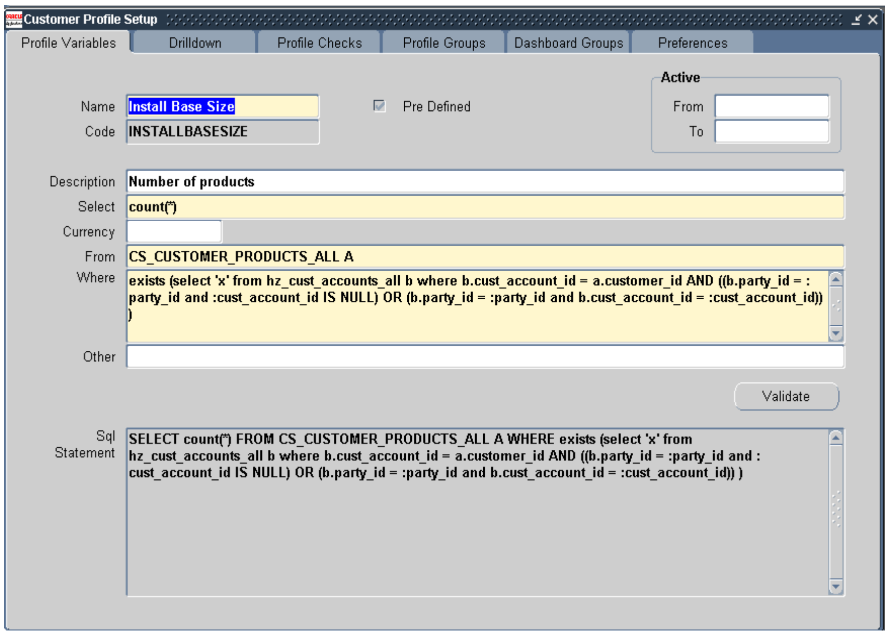
2. Click on the Add button on the toolbar.
3. Enter the appropriate values in the following fields to create a new profile variable:

a. Name(mandatory field). The Code field will reflect the name you have entered in the Name field. You may substitute the value in the Code field with another unique value.

b. Active: From and Active: To dates (optional).

c. Description (optional).

d. Currency (optional).



4. Enter the appropriate SQL statements in the following fields:

   - Select (mandatory field).
   - From (mandatory field).
   - Where (mandatory field).
   - Other (optional, used for including clauses such as Order By).

5. To validate SQL statement, click on the Validate button.

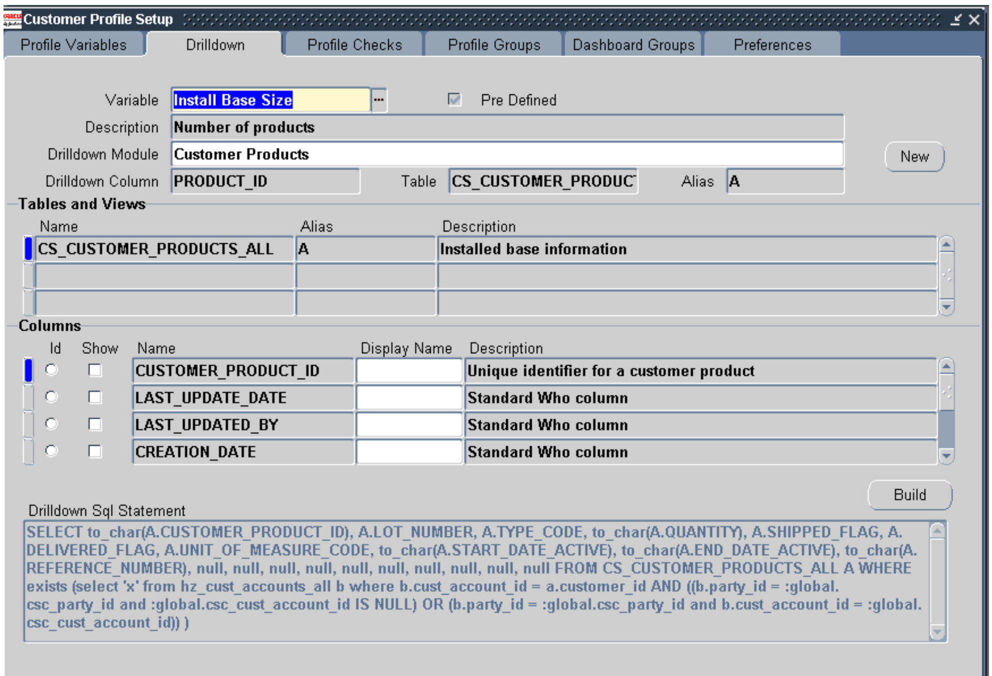
6. Save the profile variable.

Defining Drilldowns

To define a drilldown:

1. Open the Drilldown tab using the following navigation path:

   Setup—>Customer Management—>Customer Profiles—> Drilldown tab.



2. From the Variable field, select the profile variable for which you want to define the drilldown.

   The Description field as well as the Tables and Views section display relevant information on the selected profile variable.

3. In the Drilldown Module field, select the module which is to be linked to the profile variable.

4. In the Columns section, select the drilldown column by clicking on the Radio button associated with it. This is the column which would allow the drilldown to the transaction screen. For example, if service request number is a defined as a drilldown column, clicking on the service request number in the summary list

of the transactions will open the Service Request window containing the details of the service request.

5. Select the Show check box associated with the columns which you want to display on the Summary list.
6. Enter a user-friendly name for the column in the Display name field. This name will be displayed in the summary list.
7. Optionally, click on the Build button to generate the SQL for the drilldown.
8. Save the drilldown.
9. If you want to define a new drilldown module, click on the New button.

Defining Profile Checks

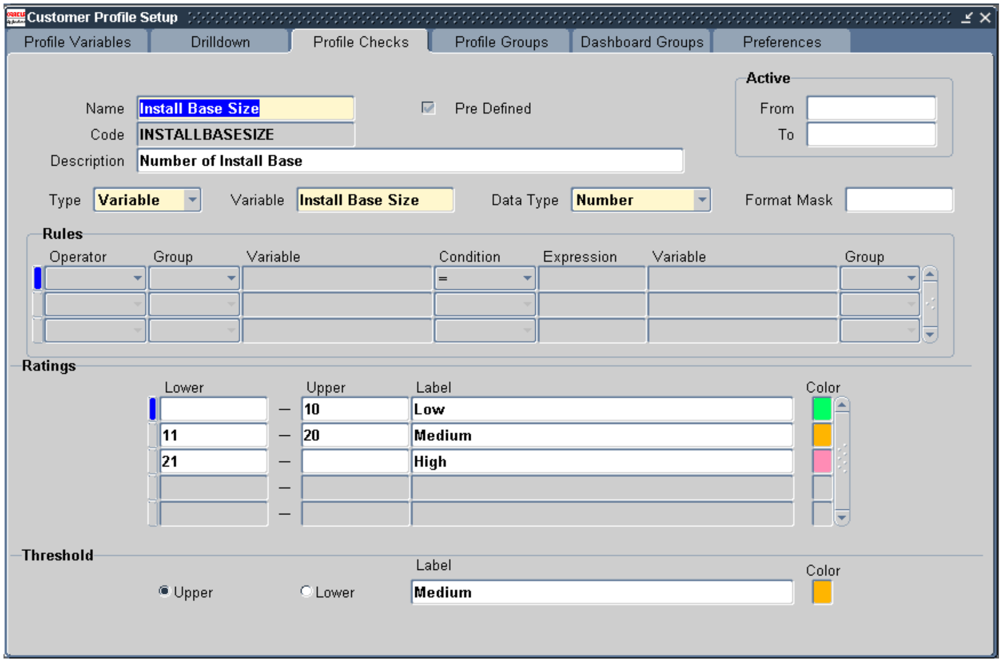
Profile checks are created using one or more profile variables. Profile checks incorporate business rules upon which the profile values are based and are associated with grading levels and values. Each Grade can have a different label and can be associated with a color. Profile checks can also have threshold values.

Threshold indicates an upper or lower boundary for the profile check. Profile check may be configured so that it is displayed only when the check value crosses the threshold.

To define profile Checks:

1. Open the Profile Checks tab using the following navigation path:

   Setup—>Customer Profile Setup—>Profile Checks tab.
2. Enter a name for the profile check in the Name field.
3. Enter a description for the profile check in the Description field.
4. Enter the period when the profile check is to be in force by specifying the Active From and Active To fields.
5. In the Type field, select the profile check type you want to create.
6. In the Variable field, select the variable on which the profile check is to be based.
7. In the Data Type field, enter the data type for the variable you have selected.



8. In the Format Mask field, enter a format mask, if appropriate.

9. In the Ratings section, define set(s) of numeric low and high values to represent the different value ranges. Also select an appropriate label for the rating set. The color appropriate to the rating will be automatically assigned after you select a label.

10. If needed, set the threshold for the rating and select a label for it. To define the threshold for the current rating, click the Upper or Lower radio button in the Threshold section.

11. Save the profile check you have defined.

To define a boolean profile check:

1. Perform steps 1-4 explained in the previous section.

2. In the Type field, select Boolean.

3. In the Rules section, build a logical condition (rule) for comparing or more existing profile variables.

4. Save the profile check you have defined.

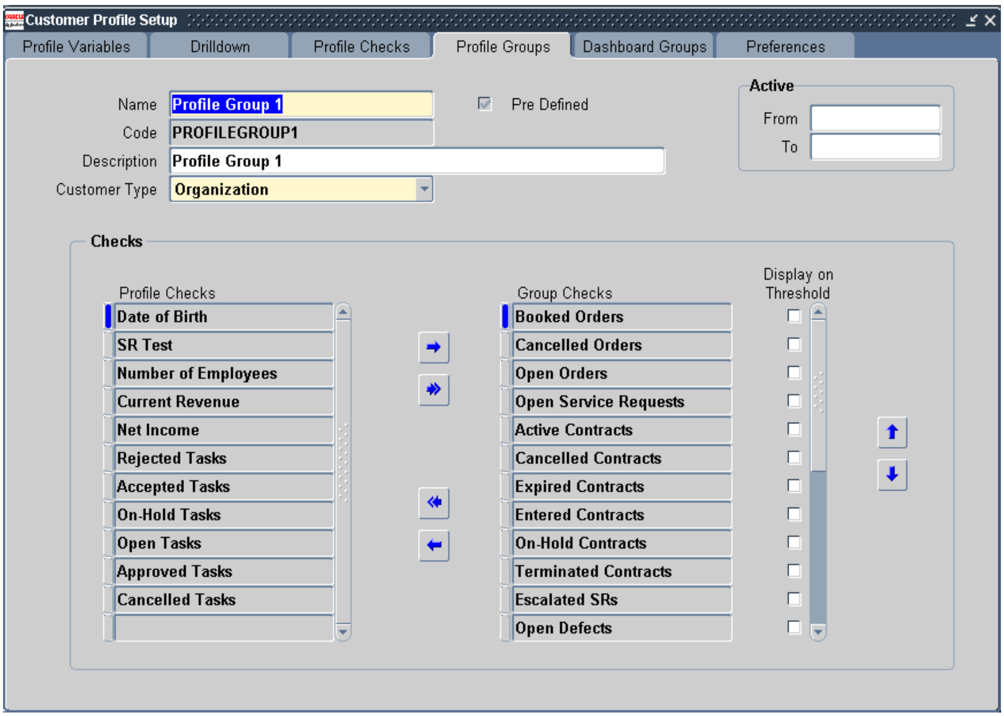
Defining Profile Groups

Profile group is a set of profile checks that are to be displayed together. The profile checks inside a group can be sequenced. The group can be associated with a form name to indicate the check values and the order in which they will be displayed when viewing profile from that form.

To define profile groups:

1. Open the Profile Groups tab using the following navigation path:

   Setup—>Customer Management —>Customer Profiles —>Profile Groups tab.



2. In the Name field, enter a name for the profile group.

   All existing profile checks are displayed in the checks region.

3. In the Description field, enter a description for the profile group you are defining.

4. In the Customer Type field, select the customer type you want to associate with the profile group. You can choose Person, Group, Organization, or All as the customer type. For instance, if Group X is associated with customer type Organization, then Group X will be displayed by default when the contact for an organization calls in for customer service. However, if it is a person calling in a B2C scenario, Group X would not be displayed.
5. Enter active period (Active From and Active To dates) for the profile group.
6. In the Checks section, carry out the following steps:
    a. Select the appropriate profile check from the Profile Checks column and move it to the Group Checks column.

       Use the right and left arrow buttons to move the profile checks between the columns. Use the up arrow and down arrow buttons to move the selected group check up or down in the list.
    b. Select the Display on Threshold check box if you want the check to be displayed only when the threshold level has been crossed.
7. Save the Profile group.

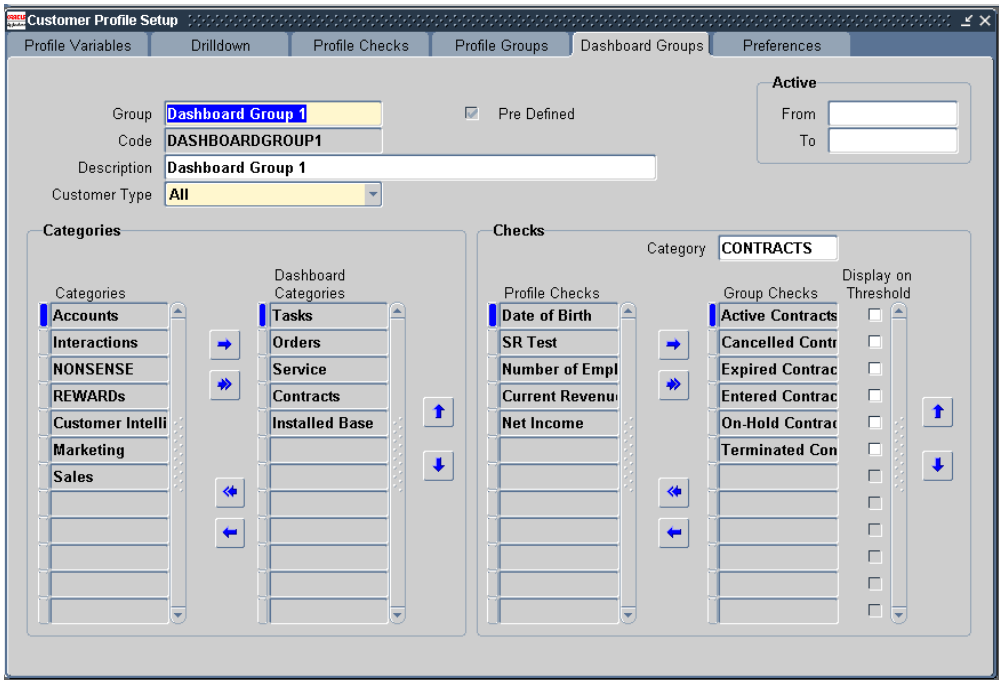
Defining Dashboard Groups

The Dashboard Groups tab is used for defining a group that will be displayed on the Dashboard tab of the Contact Center.

To define dashboard groups:

1. Open the Dashboard Groups tab using the following navigation path:

   Setup—>Customer Management —>Customer Profiles —>Dashboard Groups tab.
2. Enter a name for the dashboard group in the Group field.
3. Enter a description for the dashboard group in the Description field.
4. In the Customer Type field, select the customer type you want to associate with the dashboard group. You can choose Person, Group, Organization, or All as the customer type.
5. Enter the period (Active From and Active To dates) when the dashboard group will be active.



6. In the Categories section, select the categories for the dashboard category. To do this, move the categories you want to include in the dashboard from the Category column to the Dashboard Categories column.

   Use the right and left arrow buttons to move the Categories between the columns. Use the up arrow and down arrow buttons to move the selected dashboard category up or down in the list. This sequence will determine the display sequence on the Dashboard tab of the Contact Center.

   Categories help group profile checks. For example, open, escalated and accepted tasks can all be grouped under the Tasks category. This helps to organize the display on the Dashboard tab of the Contact Center.

   Categories are created from the Preferences tab of the Customer Setup Profile window.

7. In the Category field in the Checks section, select the category for which group checks are to be defined. Use the right and left arrow buttons to move the profile checks between the columns. Use the up arrow and down arrow buttons

to move the selected group check up or down in the list. This sequence will determine the display sequence on the Dashboard tab of the Contact Center.

8. Select the Display on Threshold check box if you want the check to be displayed only when the threshold level has been crossed.

9. Save the dashboard group.

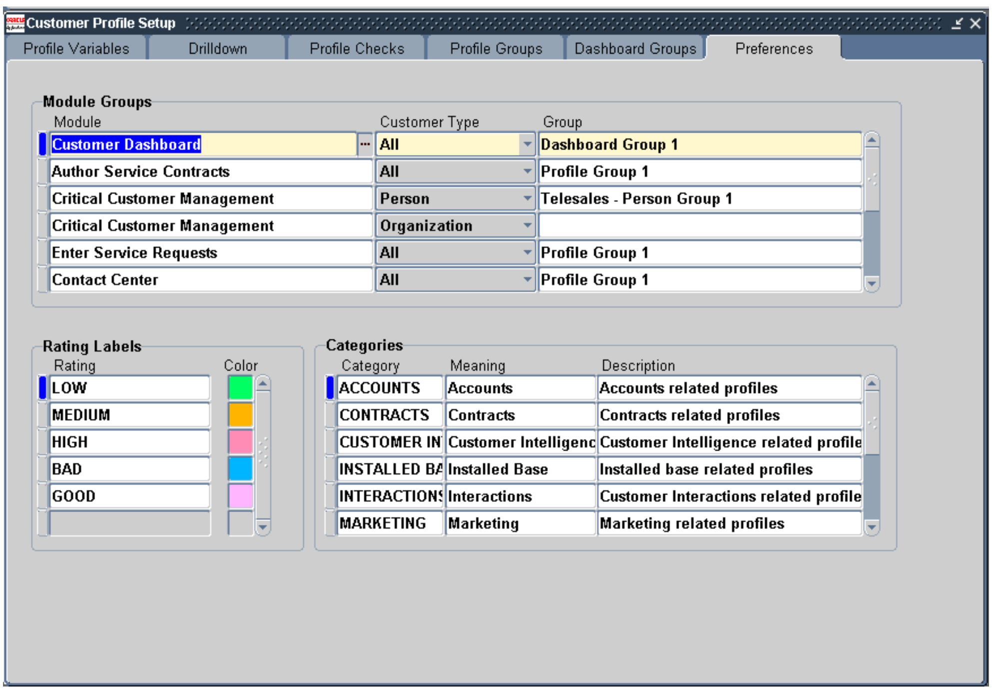
Defining Preferences

The Preferences tab may be used to override the default preferences for the customer profile.

To define preferences:

1. Open the Preferences tab using the following navigation path:

   Setup—>Customer Management —>Customer Profiles —>Preferences tab.



2. In the Module Groups section select the module to be associated with the customer type and dashboard / profile group. For example, Contact Center module may be associated with Organization and a profile group.
3. In the Rating labels section define the different rating labels and choose the color in which it is to be displayed in profile checks.
4. In the Categories section define the categories and their meaning and description.

   Categories help group profile checks. For example, open, escalated and accepted tasks can all be grouped under the Tasks category. Categories helps organize the display on the Dashboard tab of the Contact Center.

Running the Customer Profile Engine

The Customer Profile Engine is a server side PL / SQL concurrent program. You must run the Customer Profile Engine after completing the customer profile setup process so that all the SQL statements defined during the setup is executed to generate the appropriate profile values. The Customer Profile Engine, when executed, performs the following operations in the sequence below:

- Evaluates the results of all the effective profile variables.
- Evaluates the results of all effective profile checks based on the profile variables.
- Evaluates the results for all the customers and accounts.

Customer Profile Engine can be run in two ways:

- As a concurrent program (for more information on running concurrent programs, refer to the Oracle System Administator's Guide).
- By clicking the Refresh button on the Profile section of the Dashboard on the Contact Center.

Setting up Relationship Plans

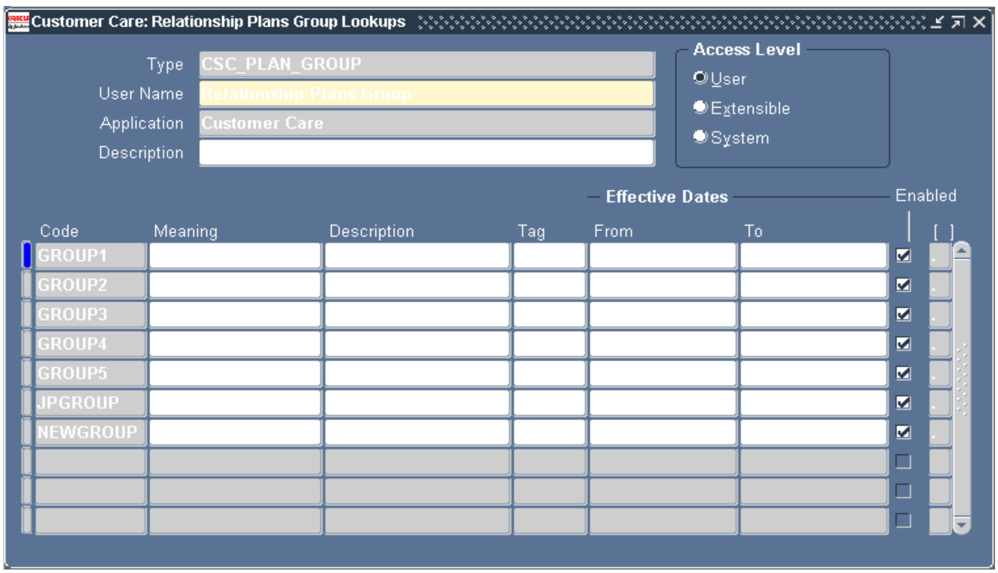
Defining Plan Groups

Plan groups help organize relationship plans into logical groups.

To define Plan groups:

1. Open the Relationship Plans Group Lookup window using the following navigation path:

   Setup—>Relationship Plans —>Define Plan Groups.



2. In the Details block, insert a new row by clicking the New tool bar button.
3. In the new row, enter the values in Code (mandatory), Meaning (mandatory), Description, Tag, From (date) and To (date) fields.
4. Save the plan group.

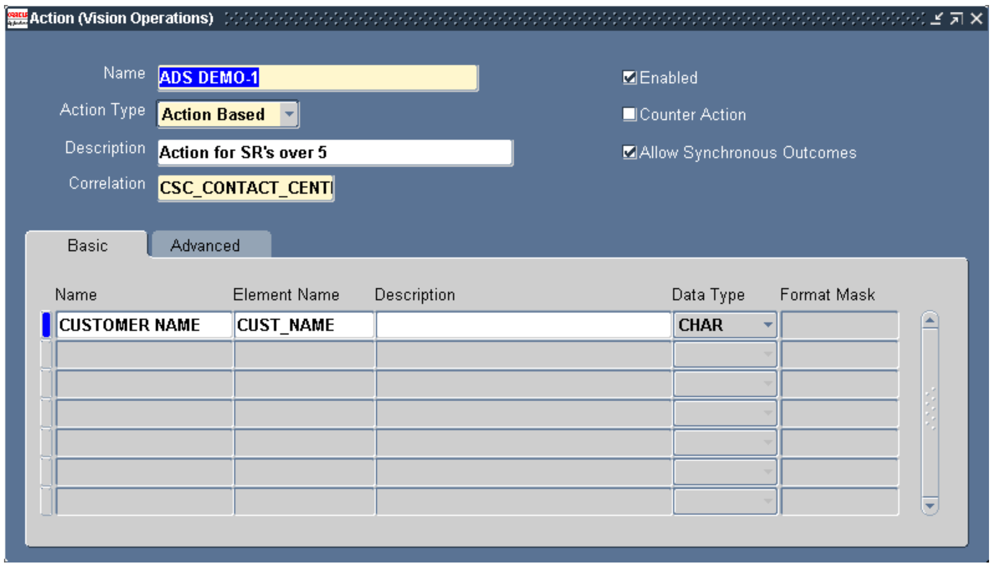
Defining an Action

You must define an action before it can be used for defining condition lines for the Relationship Plan.

To define an action:

1. Open the Action window using the following navigation path:

   Setup—>Relationship Plans —>Events—>Define Action.



2. Enter the following fields to define the action:
   - Name
   - Action Type
   - Description
   - Correlation
3. Select the following check boxes:
   - Enabled
   - Allow Synchronous Outcomes

4. In the Basic tab enter the following attributes for the Action you are creating:
   - Name
   - Element Name
   - Description
   - Data Type
   - Format Mask
5. Save the action.

Note: The Relationship Plans module provides predefined Actions. You can create new actions using the preceding steps. However, you will have to customize the code to accept these parameters.

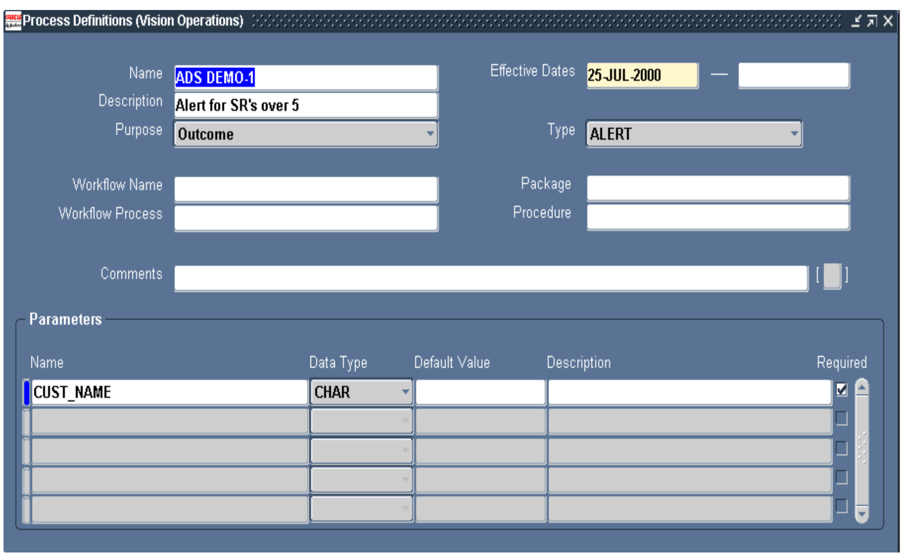
Defining Process Definition

Process definitions define the outcomes which are utilized for setting conditions in the in the Conditions window.

To define process definition:

1. Open the Process Definitions window using the following navigation path:

   Setup—>Relationship Plans —>Events—>Define Process Definitions.



2. Enter the values for the following fields:
   - Name
   - Description
   - Purpose (outcome)
   - Type (maybe an alert)
3. In the Parameters section enter the values for the following parameters:
   - Name
   - Data Type
4. Save the process definition.

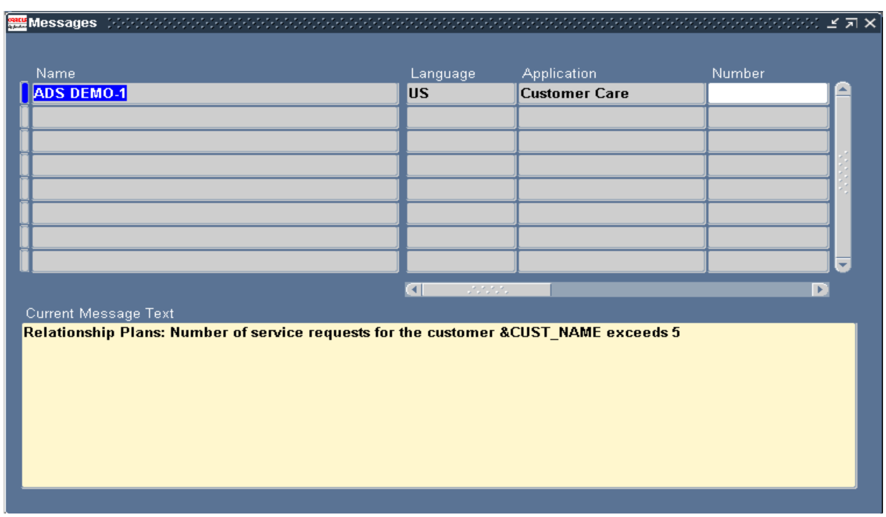
Defining Messages

The following procedure explains how to define the seeded messages to be displayed in the message body of real-time alerts.

To define messages:

1. Using Application Developer as your responsibility, open the Messages window using the following navigation path:

   Application—>Messages.



2. Enter the values in the following fields to create a message:
   - Name
   - Language
   - Application
   - Current Message Text

   Note: An Alert Message must have the same token as the parameter used in the Process Definition.

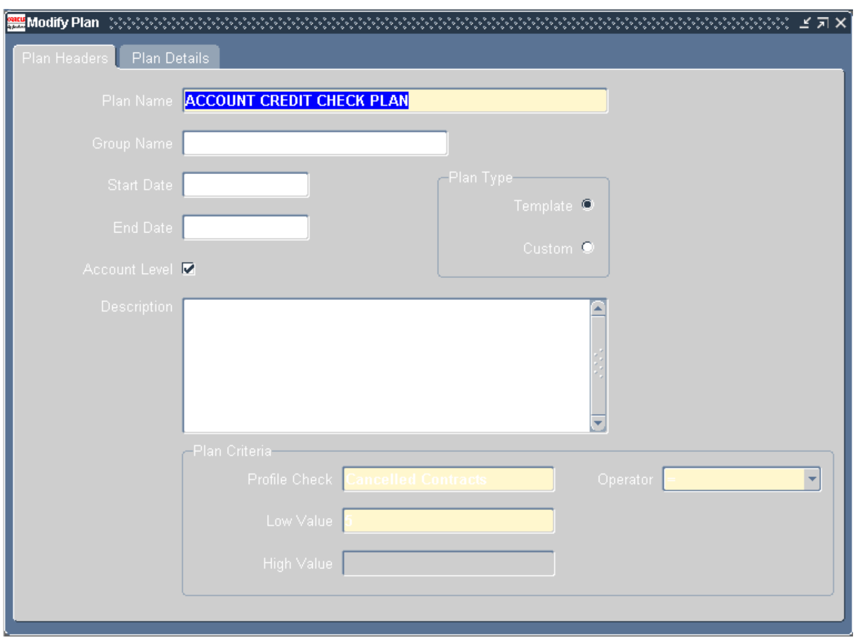
3. Save the message.

Defining Relationship Plans

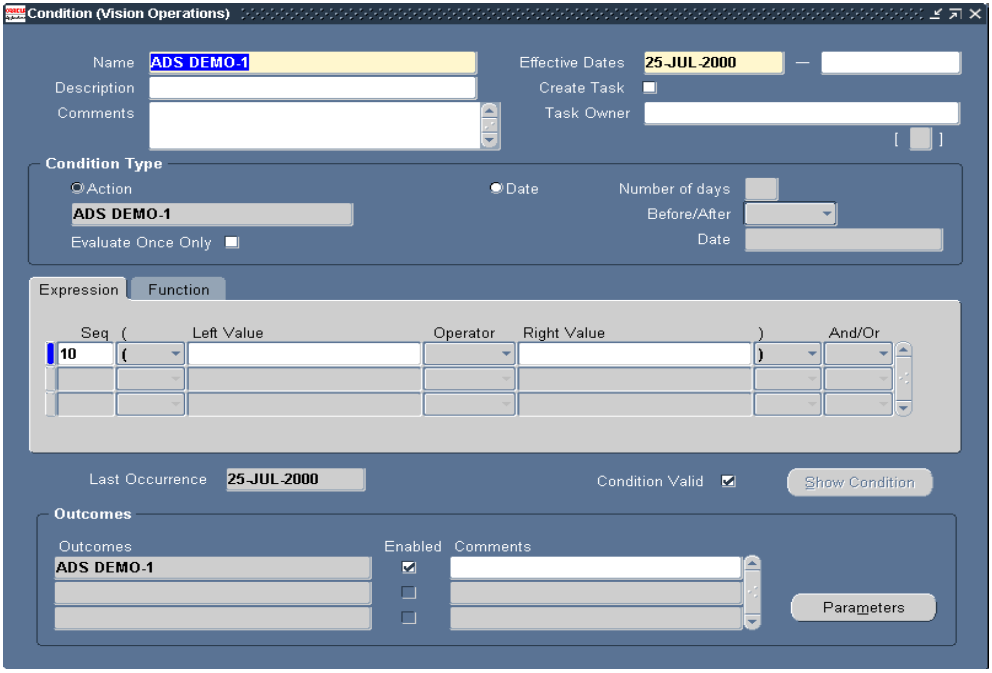
To define relationship plans:

1. Open the New Plan window using the following navigation path:

   Setup—>Relationship Plans —>Define Relationship Plans.

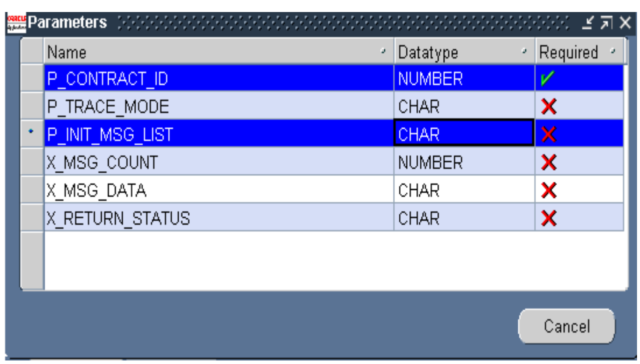


2. In the Plan Header tab enter the following:
   - Plan Name (mandatory)
   - Group Name
   - Start Date
   - End Date
   - Description
3. In the Plan Criteria section, enter the following mandatory fields:
   - Profile Check
   - Operator
   - Low Value
   - High Value (enabled when operator between and not between is selected)
4. Select Account level check box if you want to create a plan that is valid at account level.
5. Save the plan.
6. Open the Plan Details tab by clicking the Plan Details tab.
7. Click on the New Condition button. The Condition window opens.
8. In the Condition window, do the following:
   a. Enter the following values to identify the condition lines:
      * Name
      * Effective dates
      * Description
      * Comments
   b. In the Condition Type region:
      * Select the Action radio button. The Date condition type is not supported by relationship plans.
      * Select an action in the Action field.
   c. Enter an Expression or Function, if needed. To enter a function, click on the Function tab.



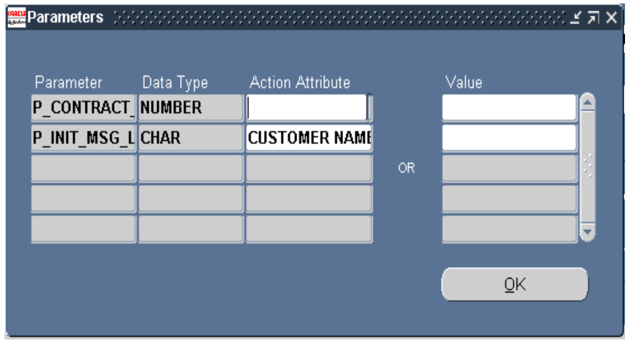
d. In the Outcomes region, select an outcome. Outcomes are defined as explained in the Defining Process Definition section. Note that outcomes can be real time such as alerts/scripts or background such as tasks.

e. Click on the Parameters button to open the Parameters window.



a. Select the appropriate parameter lines. Right-click to open the canvas menu.

b. Choose the Populate.... option. The following screen should be displayed.

- 

c. Choose the Action Attribute

d. Click OK.

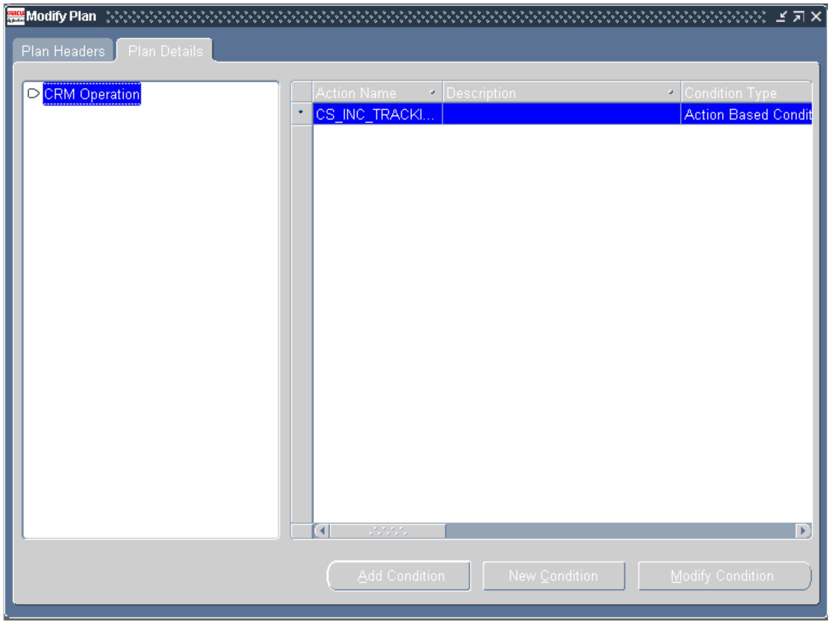
Note: The name of the action attribute should be identical to that defined on the Basic tab of the Action window.

9. Save the conditions and close the Condition window.

Adding Condition Lines to the Relationship Plan

To add condition lines to the relationship plan:

1. From the Plan Details tab in the Modify Plan window, click on the Add Condition button.
2. Select a condition line and click OK to attach it to the plan header.
3. To modify a condition line, do the following:
   - Click on the Modify Condition button on the Plan Details window.
   - Make the necessary changes to the condition line or outcome.
   - Save the modified condition line.



Enabling Plans

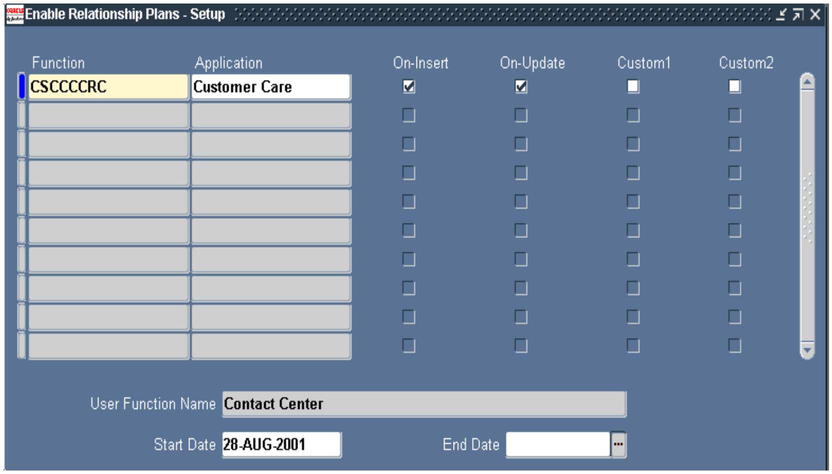
Other modules and / or applications have to be enabled for relationship plans in order to leverage its functionality.

To define relationship plans:

1. Open the Enable Relationship Plans - Setup window using the following navigation path:

   Setup—>Relationship Plans —>Enable Relationship Plans.

2. Select a function in the Function column.
3. Enter the Start and End dates.
4. Check when the relationship plan is to be enabled. You can enable relationship plans on insert and / or on update.
5. Save the settings you have specified.



Setting Up Quick Menu

Quick menu is based on seeded filters. Filters have a many to many relationship with AOL functions and are seeded in the Quick Menu tables. This section defines the association of the filter with its function in AOL.

Note that you must use the Application Developer responsibility for setting up quick menu unless otherwise indicated. Setting up the Quick Menu involves:

- Verifying AOL Menu for Quick Menu
- Adding Form Function to Your Responsibility
- Changing System Profile Value
- Using Seed Filter Values
- Using Seed Filter Functions

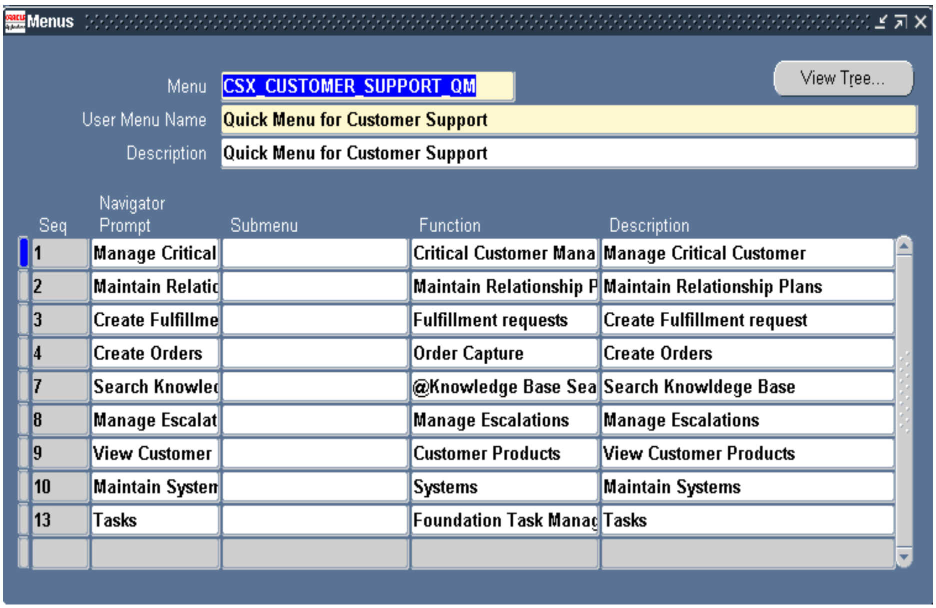
This section provides general guidelines for adding modules to the Customer Care quick menu. You must customize the individual forms and functions you want to link to the quick menu and then complete the following procedures to call these form functions.

Verifying AOL Menu for Quick Menu

To verify an AOL menu for quick menu:

1. Open the Menus window using the following navigation path:

   Application—>Menu



2. Run a query to open the seeded menu CSX_CUSTOMER_SUPPORT_QM.
3. Close the window.

Adding Form Function to Your Responsibility

The Quick Menu has already been added to the Customer Support Responsibility. However, in order to leverage the quick menu functionality for other responsibilities, you would have to use the following procedures:

To add form function to a responsibility:

1. Open the Menus window using the following navigation path:

   Application—>Menu

2. Run a query to open the responsibility you want to link to the Quick Menu.
3. Add the quick menu function to your responsibility.
4. Save your work.

Changing System Profile Value

You should use the System Administrator responsibility for changing profile values.

To change the profile values:

1. Open the System Profile Values window using the following navigation path.

   Profile—>System.
2. Set a user menu name.
3. Customize the menu.

For example, CS_QM_START_MENU profile is used in the Customer Support responsibility.

Using Seed Filter Values

Customer Care provides predefined filters.

Using Seed Filter Functions

Customer Care provides predefined filter functions.

Profile Options

The following table discusses the profile options available in the Customer Care module.

Profile Name	Description
CSC_CONTACT_CENTER_DEFAULT_TAB	Sets the default navigation tab when Contact Center window is opened.
CSC_CONTACT_CENTER_DEFAULT_OUTCOME	Sets the default outcome for interactions and activities in Contact Center.

Profile Name	Description
CSC_CONTACT_CENTER_DEFAULT_REASON	Sets the default reason for interactions and activities in Contact Center.
CSC_CONTACT_CENTER_DEFAULT_RESULT	Sets the default result for interactions and activities in Contact Center.
CSC_CONTACT_CENTER_NUM_INTERACTIONS	Sets the number of interactions displayed on the Interactions tab in Contact Center.
CSC_CURRENCY_CODE	Sets the user currency code for multi-currency conversions.
CSC_DEFAULT_SERVICE_REQUEST_FORM	Determines the Service Request form — Coms Service Request form or Enter Service Request form — to be called.
CSC_SCRIPTING_PORT	Sets the port to communicate with the scripting server.
CSC_SCRIPTING_SERVER	Sets the name of the host machine on which the scripting server resides.
CSC_SCRIPTING_SID	Specifies the database used to support the scripting tool.
CSC_SCRIPTING_THREE_TIER	Specifies whether the environment is setup for two-tier or three-tier scripting.
CSC_CRITICAL_CUSTOMER_CHECK	Checks to determine criticality of customers.