

# Oracle® Customer Care

Implementation Guide

Release 11*i*

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**Oracle Customer Care Implementation Guide, Release 11*i***

**Part No. A86218-02**

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# Preface

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

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



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# 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:

- n Setting up Customer Profile
- n Defining Preferences
- n Running the Customer Profile Engine
- n Setting up Relationship Plans
- n Defining Messages
- n Defining Relationship Plans
- n Setting Up Quick Menu
- n 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:

- n Open Service Request
- n Escalated SRs
- n Open Tasks
- n Approved Tasks
- n 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.

**See Also:**

- n Defining Profile Ratings
- n Defining Profile Variables
- n Defining Drilldowns
- n Defining Profile Checks
- n Defining Profile Groups
- n Defining Dashboard Groups
- n Defining Preferences

## 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)

Customer Care Lookups

TypeCSC\_PROF\_RATINGS

User NameCustomer Profile Rating Codes

ApplicationCustomer Care

DescriptionRatings for Customer profile check values

Access Level

☐ User

☒ Extensible

☐ System

Effective Dates

Enabled

Code	Meaning	Description	Tag	From	To		
HIGH	High	Rating to represent Hi		28-FEB-2000		<input checked="" type="checkbox"/>	
LOW	Low	Rating to represent Lo		28-FEB-2000		<input checked="" type="checkbox"/>	
MEDIUM	Medium	Rating to represent M		28-FEB-2000		<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"/>	

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.

See Also:

- n

Setting up Customer Profile
- n

Defining Profile Variables
- n

Defining Drilldowns
- n

Defining Profile Checks
- n

Defining Profile Groups
- n

Defining Dashboard Groups
- n

Defining Preferences

## 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.

Sql statements can contain variables :party\_id and :cust\_account\_id. If the sql refers to a particular party, the :party\_id variable should be used. If the sql refers to a particular account for a customer, the :cust\_account\_id variable should be used.

Note: No other bind variables will be supported.

### 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).

The screenshot shows the 'Customer Profile Setup' window with the 'Profile Variables' tab selected. The form contains the following fields and values:

- Name:** Install Base Size
- Code:** INSTALLBASESIZE
- Pre Defined:** ☒
- Active:** From: , To:
- Description:** Number of products
- Select:** count(\*)
- Currency:**
- From:** CS\_CUSTOMER\_PRODUCTS\_ALL A
- Where:** exists (select 'x' from hz\_cust\_accounts\_all b where b.cust\_account\_id = a.customer\_id AND ((b.party\_id = : party\_id and :cust\_account\_id IS NULL) OR (b.party\_id = :party\_id and b.cust\_account\_id = :cust\_account\_id)) )
- Other:**
- Validate:** [button]
- Sql Statement:** SELECT count(\*) FROM CS\_CUSTOMER\_PRODUCTS\_ALL A WHERE exists (select 'x' from hz\_cust\_accounts\_all b where b.cust\_account\_id = a.customer\_id AND ((b.party\_id = :party\_id and :cust\_account\_id IS NULL) OR (b.party\_id = :party\_id and b.cust\_account\_id = :cust\_account\_id)) )

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.

### See Also:

- Setting up Customer Profile
- Defining Profile Ratings
- Defining Drilldowns
- Defining Profile Checks
- Defining Profile Groups

- n Defining Dashboard Groups
- n Defining Preferences

## Defining Drilldowns

### To define a drilldown:

1. Open the Drilldown tab using the following navigation path:  
Setup—>Customer Management—>Customer Profiles—> Drilldown tab.

**Customer Profile Setup**

Profile Variables | **Drilldown** | Profile Checks | Profile Groups | Dashboard Groups | Preferences

Variable: **Install Base Size** ☒ Pre Defined

Description: **Number of products**

Drilldown Module: **Customer Products** New

Drilldown Column: **PRODUCT\_ID** Table: **CS\_CUSTOMER\_PRODUC** Alias: **A**

**Tables and Views**

Name	Alias	Description
<b>CS_CUSTOMER_PRODUCTS_ALL</b>	<b>A</b>	<b>Installed base information</b>

**Columns**

Id	Show	Name	Display Name	Description
<input checked="" type="radio"/>	<input type="checkbox"/>	<b>CUSTOMER_PRODUCT_ID</b>		<b>Unique identifier for a customer product</b>
<input type="radio"/>	<input type="checkbox"/>	<b>LAST_UPDATE_DATE</b>		<b>Standard Who column</b>
<input type="radio"/>	<input type="checkbox"/>	<b>LAST_UPDATED_BY</b>		<b>Standard Who column</b>
<input type="radio"/>	<input type="checkbox"/>	<b>CREATION_DATE</b>		<b>Standard Who column</b>

**Drilldown Sql Statement** Build

```
SELECT to_char(A.CUSTOMER_PRODUCT_ID), A.LOT_NUMBER, A.TYPE_CODE, to_char(A.QUANTITY), A.SHIPPED_FLAG, A.DELIVERED_FLAG, A.UNIT_OF_MEASURE_CODE, to_char(A.START_DATE_ACTIVE), to_char(A.END_DATE_ACTIVE), to_char(A.REFERENCE_NUMBER), null, null, null, null, null, null, null, null, null, null FROM CS_CUSTOMER_PRODUCTS_ALL A WHERE exists (select 'x' from hz_cust_accounts_all b where b.cust_account_id = a.customer_id AND ((b.party_id = :global.csc_party_id and :global.csc_cust_account_id IS NULL) OR (b.party_id = :global.csc_party_id and b.cust_account_id = :global.csc_cust_account_id)) )
```

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. Click on the required table (alias) record on the "Tables and views" region. The columns of this particular "table and view" would be displayed.
5. 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 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.
6. Select one column as "ID" column using the "Id" radio button. The selected column, table name and alias name would be displayed in the header.

Note: Only one "Id" column can be present for a profile variable.

7. Enter a user-friendly name for the column in the Display name field. This name will be displayed in the summary list.
8. Select the Show check box associated with the columns which you want to display on the Summary list.
9. Optionally, click on the Build button to generate the SQL for the drilldown.
10. Save the changes.
11. If the required drilldown module is not available in the LOV for the Drilldown field, you can define a new one. You need to carry out the following steps to achieve that:
  - n Click on the New button.
  - n The "Task setup : Object types" Form should be displayed
  - n Create an object\_type with the object\_code beginning with 'CSC\_PROF' (e.g. CSC\_PROF\_CSXSRSISV)
  - n Enter the function
  - n Enter the name and parameters
  - n Save your changes
12. The new object code should be available in the Drilldown Module field of the Drilldown tab.

### See Also:

- n Setting up Customer Profile
- n Defining Profile Ratings
- n Defining Profile Variables



- n Defining Profile Checks
- n Defining Profile Groups
- n Defining Dashboard Groups
- n Defining Preferences

## 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.

Customer Profile Setup

Profile Variables

Drilldown

Profile Checks

Profile Groups

Dashboard Groups

Preferences

Name

Install Base Size

Code

INSTALLBASESIZE

Description

Number of Install Base

Type

Variable

Variable

Install Base Size

Data Type

Number

Format Mask

Active

From

To

Pre Defined

☒

Rules

Operator	Group	Variable	Condition	Expression	Variable	Group

Ratings

Lower	Upper	Label	Color
	10	Low	
11	20	Medium	
21		High	

Threshold

Upper

Lower

Label

Medium

Color

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.

**See Also:**

- <sup>n</sup>    Setting up Customer Profile
- <sup>n</sup>    Defining Profile Ratings
- <sup>n</sup>    Defining Profile Variables
- <sup>n</sup>    Defining Drilldowns
- <sup>n</sup>    Defining Profile Groups
- <sup>n</sup>    Defining Dashboard Groups
- <sup>n</sup>    Defining Preferences

## 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.

The screenshot shows the 'Customer Profile Setup' window with the 'Profile Groups' tab selected. The window has a title bar and several tabs: 'Profile Variables', 'Drilldown', 'Profile Checks', 'Profile Groups' (active), 'Dashboard Groups', and 'Preferences'. The main area contains the following fields and sections:

- Name:** 'Profile Group 1' (highlighted in yellow)
- Code:** 'PROFILEGROUP1'
- Description:** 'Profile Group 1'
- Customer Type:** 'Organization' (highlighted in yellow)
- Pre Defined:** ☒
- Active:** A section with 'From' and 'To' date pickers.
- Checks:** A large section containing two columns of checks and a 'Display on Threshold' section.
  - Profile Checks:** A list of checks including 'Date of Birth', 'SR Test', 'Number of Employees', 'Current Revenue', 'Net Income', 'Rejected Tasks', 'Accepted Tasks', 'On-Hold Tasks', 'Open Tasks', 'Approved Tasks', and 'Cancelled Tasks'. Arrows indicate movement between columns.
  - Group Checks:** A list of checks including 'Booked Orders', 'Cancelled Orders', 'Open Orders', 'Open Service Requests', 'Active Contracts', 'Cancelled Contracts', 'Expired Contracts', 'Entered Contracts', 'On-Hold Contracts', 'Terminated Contracts', 'Escalated SRs', and 'Open Defects'.
  - Display on Threshold:** A vertical slider with up and down arrows.

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.

**See Also:**

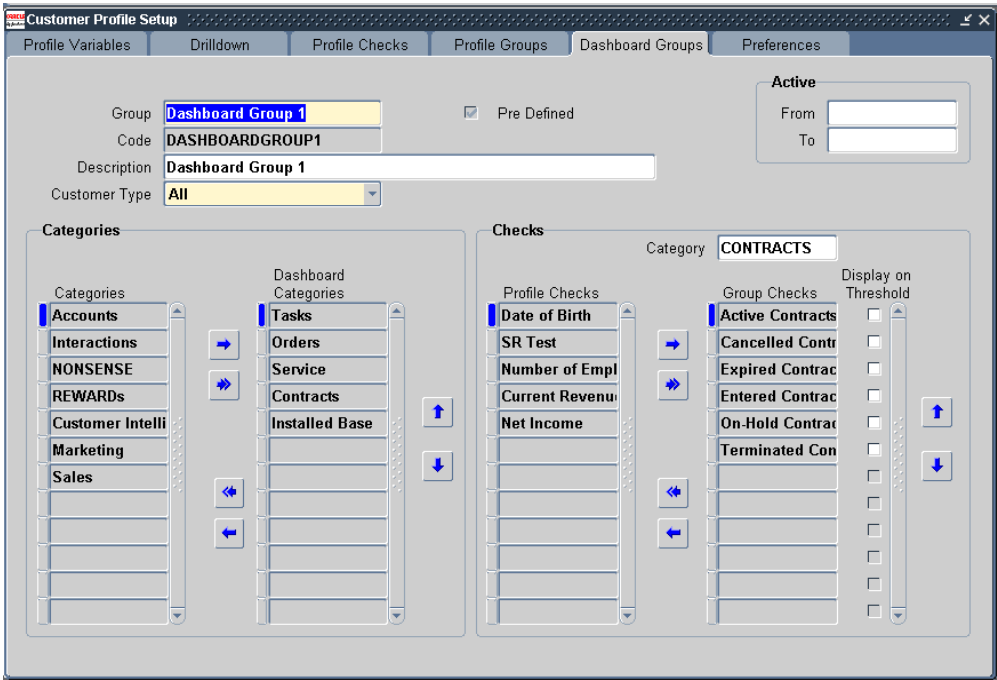
- n [Setting up Customer Profile](#)
- n [Defining Profile Ratings](#)
- n [Defining Profile Variables](#)
- n [Defining Drilldowns](#)
- n [Defining Profile Checks](#)
- n [Defining Dashboard Groups](#)
- n [Defining Preferences](#)

## 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.

**See Also:**

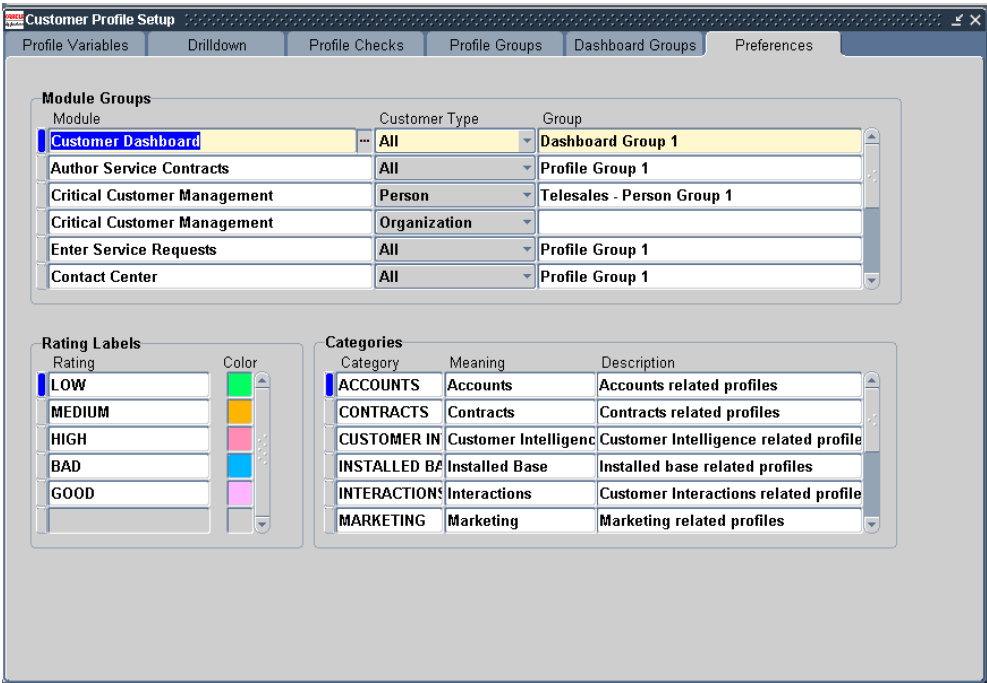
- n Setting up Customer Profile
- n Defining Profile Ratings
- n Defining Profile Variables
- n Defining Drilldowns
- n Defining Profile Checks
- n Defining Profile Groups
- n Defining Preferences

## 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.

**See Also:**

- Setting up Customer Profile
- Defining Profile Ratings
- Defining Profile Variables
- Defining Drilldowns



- Defining Profile Checks
- Defining Profile Groups
- Defining Dashboard Groups

## 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 Administrator'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.

Code	Meaning	Description	Tag	Effective Dates	Enabled	
				From	To	
GROUP1						<input checked="" type="checkbox"/>
GROUP2						<input checked="" type="checkbox"/>
GROUP3						<input checked="" type="checkbox"/>
GROUP4						<input checked="" type="checkbox"/>
GROUP5						<input checked="" type="checkbox"/>
JPGROUP						<input checked="" type="checkbox"/>
NEWGROUP						<input checked="" type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>
						<input type="checkbox"/>

- 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.

**See Also:**

- Defining an Action
- Defining Process Definition

- n Defining Relationship Plans
- n Adding Condition Lines to the Relationship Plan
- n Enabling Plans

## 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.

Name	Element Name	Description	Data Type	Format Mask
CUSTOMER NAME	CUST_NAME		CHAR	

2. Enter the following fields to define the action:
  - n Name
  - n Action Type
  - n Description
  - n 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.

### See Also:

- ☐ Defining Plan Groups
- ☐ Defining Process Definition
- ☐ Defining Relationship Plans
- ☐ Adding Condition Lines to the Relationship Plan
- ☐ Enabling Plans

## Defining Process Definition

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

**Process Definitions (Vision Operations)**

Name:  Effective Dates:  —

Description:  Type:

Purpose:

Workflow Name:  Package:

Workflow Process:  Procedure:

Comments:

**Parameters**

Name	Data Type	Default Value	Description	Required
CUST_NAME	CHAR			<input checked="" type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>
				<input type="checkbox"/>

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

**See Also:**

- n Defining Plan Groups
- n Defining an Action
- n Defining Relationship Plans
- n Adding Condition Lines to the Relationship Plan
- n Enabling Plans

## 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.

Name	Language	Application	Number
ADS DEMO-1	US	Customer Care	

Current Message Text

Relationship Plans: Number of service requests for the customer &CUST\_NAME exceeds 5

2. Enter the values in the following fields to create a message:

- n Name
- n Language
- n Application
- n 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.

The screenshot shows the 'Modify Plan' window with the 'Plan Details' tab selected. The fields are as follows:

- Plan Name:** ACCOUNT CREDIT CHECK PLAN
- Group Name:** (empty)
- Start Date:** (empty)
- End Date:** (empty)
- Account Level:** ☒
- Description:** (empty text area)
- Plan Type:** Template ☒ Custom ☐
- Plan Criteria:**
  - Profile Check:** Cancelled Contracts
  - Operator:** (dropdown menu)
  - Low Value:** (empty)
  - High Value:** (empty)

2. In the Plan Header tab enter the following:
  - n Plan Name (mandatory)
  - n Group Name
  - n Start Date
  - n End Date
  - n Description
3. In the Plan Criteria section, enter the following mandatory fields:
  - n Profile Check

- n Operator
  - n Low Value
  - n 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.



**Condition (Vision Operations)**

Name: **ADS DEMO-1** Effective Dates: **25-JUL-2000**

Description:   
 Comments:   
 Create Task: ☐ Task Owner:   
 [ ]

**Condition Type**

☐ Action ☐ Date Number of days:   
 **ADS DEMO-1** Before/After:   
 Evaluate Once Only: ☐ Date:   
 [ ]

**Expression** **Function**

Seq	(	Left Value	Operator	Right Value	)	And/Or
10	(				)	

Last Occurrence: **25-JUL-2000** Condition Valid: ☒ **Show Condition**

**Outcomes**

Outcomes	Enabled	Comments
<b>ADS DEMO-1</b>	<input checked="" type="checkbox"/>	
	<input type="checkbox"/>	
	<input type="checkbox"/>	

**Parameters**

- 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.

**Parameters**

Name	Datatype	Required
P_CONTRACT_ID	NUMBER	<input checked="" type="checkbox"/>
P_TRACE_MODE	CHAR	<input checked="" type="checkbox"/>
P_INIT_MSG_LIST	CHAR	<input checked="" type="checkbox"/>
X_MSG_COUNT	NUMBER	<input checked="" type="checkbox"/>
X_MSG_DATA	CHAR	<input checked="" type="checkbox"/>
X_RETURN_STATUS	CHAR	<input checked="" type="checkbox"/>

**Cancel**

- a. Select the appropriate parameter lines. Right-click to open the canvas menu.
- b. Choose the Populate.... option. The following screen should be displayed.

Parameter	Data Type	Action Attribute	Value
P_CONTRACT	NUMBER		
P_INIT_MSG_L	CHAR	CUSTOMER NAME	

OR

OK

- 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.

### See Also:

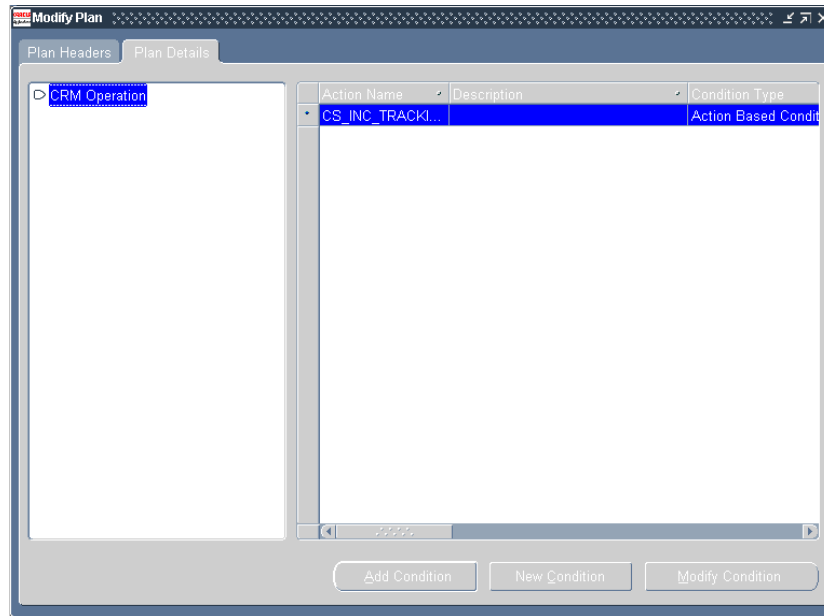
- n Defining Plan Groups
- n Defining an Action
- n Defining Process Definition
- n Adding Condition Lines to the Relationship Plan
- n Enabling Plans

## 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:

- n Click on the Modify Condition button on the Plan Details window.
- n Make the necessary changes to the condition line or outcome.
- n Save the modified condition line.

**See Also:**

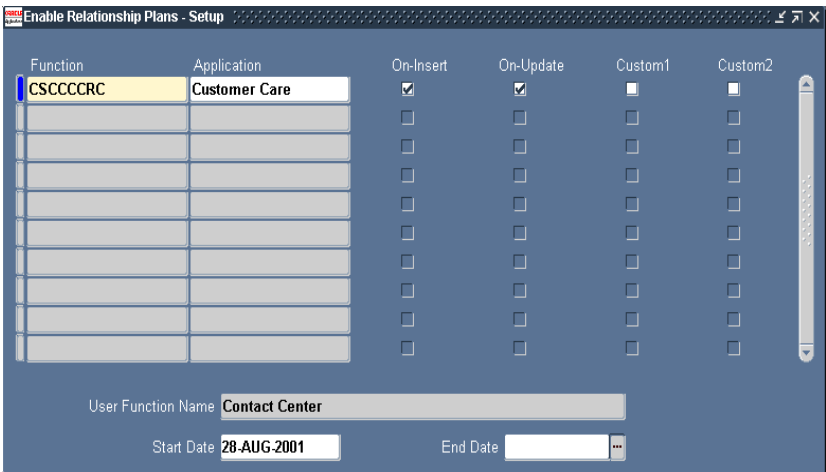
- n Defining Plan Groups
- n Defining an Action
- n Defining Process Definition
- n Defining Relationship Plans
- n Enabling Plans

## 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.



**See Also:**

- n Defining Plan Groups
- n Defining an Action
- n Defining Process Definition
- n Defining Relationship Plans
- n Adding Condition Lines to the Relationship Plan

## 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.

For the Customer Support responsibility, the Quick Menu has already been setup. To familiarize yourself with the quick menu setup, perform the following steps:

- n Verifying System Profile Values
- n Verifying AOL Menu for Quick Menu

## View System Profile Value

You should use the System Administrator responsibility to view the profile values.

### To view the profile values:

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

Profile—>System.

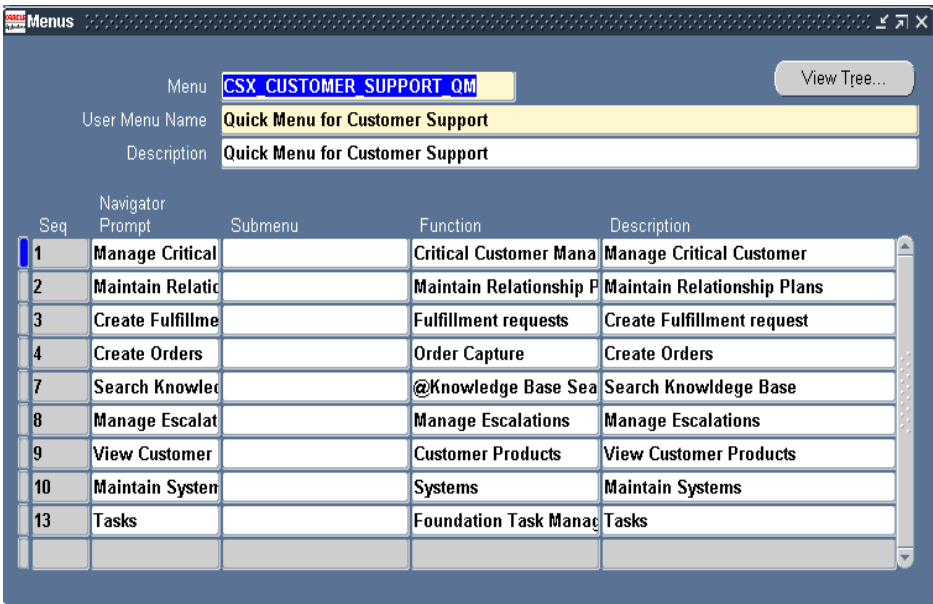
Select the profile name. For example, CS\_QM\_START\_MENU profile is used in the Customer Support responsibility. The seeded value for this profile is CSX\_CUSTOMER\_SUPPORT\_QM.

## 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.

Customzing the Quick Menu

- 1. The customer can customize the QM menu by creating his unique menu in which he can add the quick menu enabled forms.

(Curretly all the forms which the quick menu displays by default are quick menu enabled. Please refer to the Using Quick Menu section for the complete list.)

- 2. Save the custom quick menu
- 3. Choose System Adiministrator responsibility
- 4. Add the custom menu name to the profile value at the responsibility level.

Setup Address Flexfields

The following steps need to be carried out for the Setup of Address Flexfield (Address Globalization) which is used in the Create New Party window of the Contact Center.

1. Navigate to Application Developer responsibility
2. Navigate to Flexfields > Descriptive > Register
3. Query for 'Remit Address HZ' in the Name field.

Note : This was previously referred to as 'Remit Address'. For the new customer model, the flexfield has been changed to 'Remit Address HZ'.

4. Find out the value in the Title field.
5. Close this form
6. Navigate to the Segments form : Flexfields >Descriptive >Segments
7. Query up the record for the address flexfield by entering the value found in Step 4 for Title field.
8. Uncheck the Freeze Flexfield Definition checkbox.
9. Create a new record in the Context Field Values to define an address style.
10. Enter a code, name and Description for the style of Address you want to define. For example, for United Kingdom, you can enter code => UK, Name => UK, Description => United Kingdom.
11. Click on the Segments push button. It will bring up a new form for entering the different columns for that address style. For example for UK, you can specify the following columns : Address1, Address2, Address3, Town/City, County, Postal Code
12. You can also use the Open push button for each of these columns and specify more attributes like if it is a required field or not.
13. Close the form.
14. In the Descriptive Flexfield Segments form check the Freeze Flexfield Definition checkbox.
15. Click on the Compile push button or the Save button to compile the flexfield definition to save your changes.
16. Close the form.
17. Navigate to the Lookups->Application Objects > Library form
18. Query for Lookup 'ADDRESS\_STYLE' and ensure that the country you are adding exists as a lookup code for this lookup type.
19. If it does not exist, then create an entry for the country you have included in the flexfield definition.

- 20. Close the form.
- 21. Switch Responsibility to Receivables.
- 22. Navigate to Setup->System->Countries
- 23. Query for a country and specify the style of Address that you want. For example, you could query United Kingdom in this form and in the Address Style, select the Address style that you defined earlier for UK.

Note: Only those countries that have the Address style specified in the above form will bring up the flexfield definition in the Address field of your form.

## 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.
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 — Comms Service Request form or Enter Service Request form — to be called.
CSC_CRITICAL_CUSTOMER_CHECK	Checks to determine criticality of customers.
IES_SCRIPTING_SID	SID of the database server on which Scripting is loaded
IES_SCRIPTING_PORT	Port number to connect for Scripting application
IES_SCRIPTING_SERVER	Name of the host machine on which Scripting server resides
IES_PANEL_DISPLAY_MODE	'Single Panel'/'Multi Panel' display of Scripting Panels
IES_BEAN_DISPLAY_MODE	'Embed Scripting Bean' or 'Display Separate Frame' to either embed scripting in form or display it in a separate Fram



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Profile Name	Description
IES_ARCHITECTURE_TYPE	Flag to indicate Scripting run time mode : 2 Tier/3 Tier
IES_SCRIPTING_JNDI_NAME	JNDI name used for Scripting application
CSC_DEFAULT_INSTALL_BASE_FORM	To differentiate Installed Base for Communications form and the usual Installed Base form
CSC_CONTACT_CENTER_DEFAULT_PARTY_TYPE	To set the default party type in the caller region - Organization/Group/Person
CSC_CONTACT_CENTER_LOG_ACTIVITY	Whether or not to log tasks as an activity in the interaction
CSC_CONTACT_CENTER_NUM_INTERACTIONS	To specify the number of interactions (from the last) to be displayed on Interactions tab
CSC_DEFAULT_SERVICE_REQUEST_FORM	To differentiate the support Service Request form from Service for Communications SR form
CSC_CONTACT_CENTER_DEFAULT_PHONE	Default phone type (Work/Home/Cell...) on New window
CSC_CONTACT_CENTER_DEFAULT_ADDRESS	Default party site use (Bill To/Ship To/....) on New window
CSC_CONTACT_CENTER_DEFAULT_CRACCT	Profile for Account creation
CSC_DEFAULT_RELATION_FOR_PERSON	(Employee/Contact...) on the New window

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