Oracle® Customer Care

Concepts and Procedures

Release 11*i*

August, 2000

Part No. A86219-02

Oracle Customer Care Concepts and Procedures Guide, Release 11*i*

Part No. A86219-02

Contents

Using Oracle Customer Care

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Preface

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

This Concepts and Procedures guide provides information and instructions to help you work effectively with Oracle Customer Care.

This preface explains how this Concepts and Procedures 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.

Structure

This manual contains the following chapters:

“Understanding Oracle Customer Care" provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application’s relationships to other Oracle or third-party applications.

“Using Oracle Customer Care” provides process-oriented, task-based procedures for using the application to perform essential business tasks.

Related Documents

For more information, see the following manuals:

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

Understanding Oracle Customer Care

This section provides an overview of Oracle Customer Care and its components. It explains the key concepts, features, and functions of Oracle Customer Care and how it uses other Oracle applications.

Overview of Oracle Customer Care

In today's technology driven world, it is essential for business organizations to provide customers with multiple channels of interaction. Customers need the ability to contact the customer care agent easily, using a preferred channel of communication. Oracle Customer Care provides a complete solution through seamless integration with Universal Work Queue (UWQ), Oracle *i*Support and Email Center which enables the customers to initiate a contact with the service organization directly over the phone, through email or by requesting a callback.

Oracle Customer Care is the key differentiator for companies in highly competitive industries. As products become commodities, companies attract and retain customers on the basis of customer care management. Given that it is more expensive to attract a new customer than to retain existing customers, companies are increasingly focusing on making customer interactions more efficient and effective.

Oracle Customer Care helps companies understand customers' needs, and then use this knowledge to provide service that exceeds customer expectations. It provides a means for better understanding and interacting with customers using readily available sales, order management, support, service, billing, repair history, tasks, and contract management information.

Oracle Customer Care comprises the following modules:

- Contact Center
- Relationship Plans
- Customer Profile / Dashboard
- Critical Customer Management

Business Process

The Customer Care Agent

Typically, a customer care agent accepts direct calls from customers on multiple issues. A customer care agent relies on intuitive systems and ready access to customer information to perform the job effectively.

The primary focus of the customer care agent is to understand the customer's issue and resolve it on the first call itself, if possible, thereby avoiding escalation and/or call transfers. Often, the agent must resolve the issue in an allotted time-span.

The Contact Center is a one stop shop for all customer interactions and transactions. It empowers the agent with extensive knowledge about the customer and enables him to address the needs of the customer effectively.

Customer Information Management

Contact Center is the central place for managing all customer information. The agent can view detailed information about the organization, contact, addresses and relationships for the customer and update the information as required. Being telephony enabled, the Contact Center can identify and display customer information based on certain parameters such as

- Customer ID
- Customer Number
- Account Code
- Contact Number
- ANI / Email Address if the above parameters are not entered

The agent can also use the search tool to quickly identify the customer. The agent can also create new customers in the system. The agent can also view the history of recent interactions with the customer. For further detail, the agent can drill down to the document attached to an interaction activity. Integration with Customer Intelligence enables the agent to view the profitability, satisfaction and loyalty levels for the customer.

Customer management involves tracking important customer data, and making it easily accessible to the customer care agent. For the current release, Oracle Customer Care leverages the new customer model which supports the B2C model. This has greatly enhanced the functionality to the older customer model which could only handle the traditional B2B scenarios. The new approach focuses on “Relationships” as being the key differentiator of customer. For instance, Joe Smith is a caller who is calling in on behalf of the company AtoZ.com. He is the contact for the company and he is a Manager in the Sales Department. He is also a member of 24 Nautilus Fitness. He is the father of Mary Smith and is the spouse of Jennifer Smith. These are defined as relationships and they play a pivotal role in rendering personalized service to the customer.

Based on the type of caller, B2B or B2C, the agent can correctly identify and personalize the service to the customer.

The Contact Center allows the agent to do the following Customer Management tasks:

- Create a new organization/group/contact/ caller.
- Create new relationships.
- Create, view, and update addresses.
- Create, view, and update contacts.
- Create, view, and update contact points.
- View and update organization information.
- View interaction history.
- Drill down to the attached document at the activity level.
- View and create customer notes.
- Create general notes not necessarily associated to the customer.
- Create a service request.
- Drilldown to the service request details.
- Create a task.
- View the customer profile and dashboard.
- Drilldown to the details from the customer profile and dashboard.

Customer Interaction Management

There are several ways in which a customer can initiate an interaction with a company: media items such as phone, email, web-callback or non -media items such as querying up a customer manually to perform some actions like creating a task, service request . The customer care agent can view the work items assigned to him from the UWQ screen and decide what he wants to start on. Through the UWQ screen the agent selects a work or media item. Work items can be a service request, notification, tasks while the media items consist of inbound phone call, web callback, or email.

Integration with Oracle Telephony Manager (OTM), through Universal Work Queue, is designed to facilitate media interactions. Oracle OTM routes the call to the appropriate agent based upon availability. Once the agents accepts the call, the contact center is populated. The customer is identified on the basis of the phone number, account number, or other call parameters that the caller enters in the IVR.

The Contact Center provides a single interface for managing all customer transactions. The agent can log a quick service request, search the knowledge base for solutions, assign tasks, enter and view notes for the customer. Integration with Oracle Scripting allows the agent to use scripts for problem resolution and it can be automated through use of Relationship Plans.

The intuitive user interface of the Contact Center is designed to enable an agent to handle the customer interaction as effortlessly as possible in the minimum amount of time necessary to achieve the desired result.

Dashboard and Customer Profile

Customer Profile displays relevant summarized information about the customer that is appropriate for the agent to know. It may contain information such as the lifetime value of the customer, critical customer status and various other attributes. The indicators are flagged by appropriate ratings and colors which give instant visual clues to the agent and enable them to engage appropriately with the customer. The agents have the ability to drill down from a key indicator to the detail list and eventually to the original transaction to make a more comprehensive assessment of the customer’s situation. Customer Profile is completely configurable and organizations can tailor it to their specific business needs.

Oracle Customer Care offers a set of predefined profile checks belonging to the following types:

- Service Request
- Tasks
- Orders
- Contracts

- Installed Base
- Intelligence Measure

Customer Dashboard is an extended version of the Customer Profile. It provides a panoramic view of customer transactions and, like the Customer Profile, allows the agent to drill down to the original transaction. Customer Dashboard can be configured to display any number of key indicators and organized into categories for more meaningful display.

Critical Customer Management

Oracle Customer Care allows organizations to define rules governing the criticality of their customer base. A threshold level can be defined for different profile checks which when crossed would flag the customer as critical. The agent can then initiate proper action to resolve the situation or by escalating the resolution process.

The Critical Customer Management feature of Oracle Customer Care enables agents to manually override the criticality of the customer. For example, there are situations when the profile engine may not determine a customer as being critical based on the rules setup, but the customer still needs to be flagged as critical in order for customer data to be displayed in all the relevant Oracle Customer Care windows. The agent can override the system-determined criticality in order to deal with temporary or exceptional situations.

The system determines the criticality based on the Profile "Customer Care: Critical Customer Check". The profile value indicates the "Customer profile check" that contains the business rules to determine whether a customer is critical or not.

Relationship Plans

The Relationship Plans module is designed to enable companies to automate their customer service practices and to provide proactive and consistent care for all their customers. It provides organizations with a complete tool to revamp their customer service and provide closed loop support.

Organizations can create and execute different plans for different types of customers. Relationship plans can be configured to uniquely target each customer and ensure an appropriate customer profile. Execution of these plans would improve real-time responses to customer concerns which would in turn promote customer loyalty and enhance profitability. Examples of Relationship Plans are:

- Critical Customer Plan
- Premium Customer Plan
- Account Plan

- Non-profitable Customer Plan
- Product Plans
- Product Recall Plans
- Preventive Maintenance Plans
- Customer Interactions
- Customer Retention Plans
- Customer Satisfaction Plans

Integration with Other Products

Oracle Customer Care is fully integrated with Oracle Customer Intelligence, Oracle Scripting, Oracle Contracts, Oracle Order Capture and Oracle Depot Repair.

Using Oracle Customer Care

This topic group provides process-oriented, task-based procedures for using Oracle Customer Care to perform essential business tasks. The Contact Center provides agents with instant access to customer information. The following tabs, presenting important information about he customer, are accessible from the Contact Center:

- Dashboard
- Relationships
- Organization
- Contact
- Addresses
- Contact Points
- Interaction
- Service Request
- Notes
- Tasks

See Also:

- Starting the Contact Center
- Buttons in Contact Center Status Bar
- Viewing Customer Information
- Entering Caller Information for a New Customer
- Viewing Custoemr Profile

- Viewing Installed Base Information

Starting the Contact Center

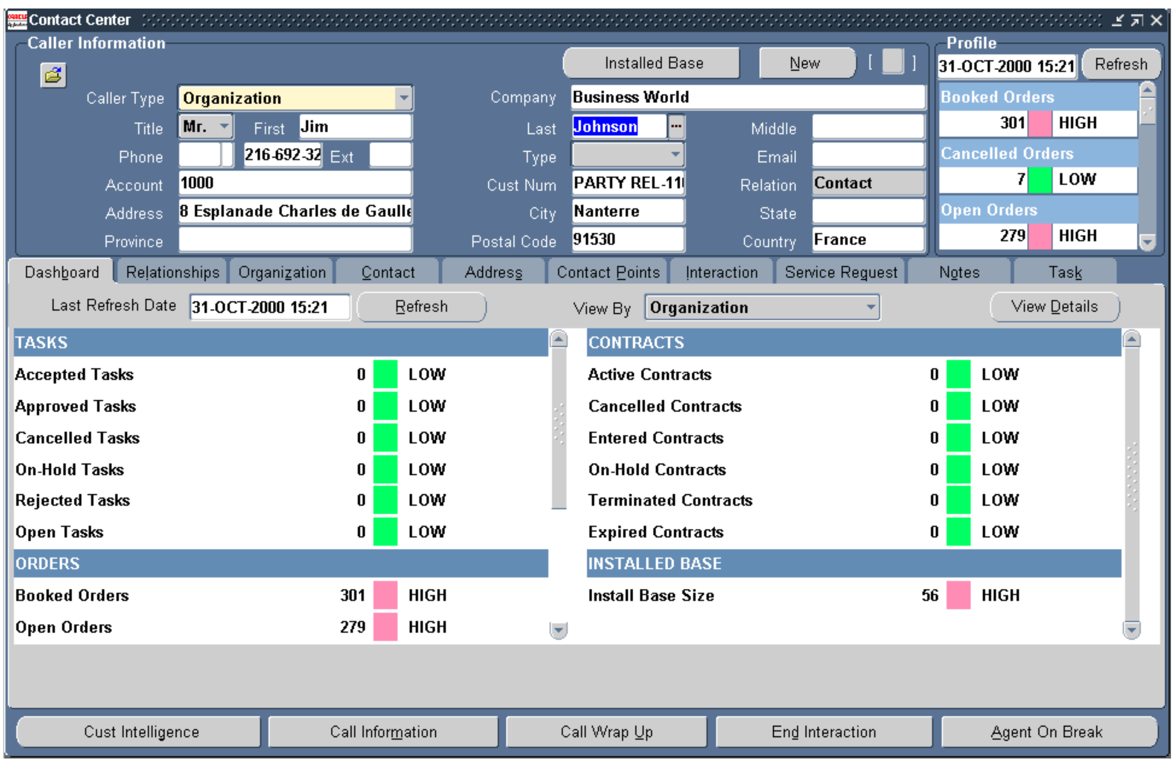
Use this procedure to open the Contact Center window.

To start the Contact Center:

1. Log on to Oracle Applications.
2. Choose Customer Support Responsibility.

   The Customer Support Navigator window appears.
3. Use the following navigation path to open the Contact Center window:

   Customer Management—>Contact Center



Buttons in Contact Center Status Bar

The following five buttons are available at all times from the Contact Center window irrespective of the tab you are currently on.

Customer Intelligence: Use this button to access Oracle Customer Intelligence. On selecting this button, a browser window opens. From this browser window, you can access business intelligence reports and graphs on the customer's loyalty, profitability, retention, etc.

Call Information: Use this button to open the Call Information window where you can view call (IVR) parameters such as ANI, DNIS, Order, System, Account Code, Service Request Number, etc. which the customer enters while calling up for customer support.

Call Wrap Up: Use this button to open the Call Wrap Up window where you can enter information about the outcome of the interaction with the customer as well as other call wrap up information. This will automatically end the interaction.

End Interaction: Use this button to terminate the customer interaction if you have no wrap up information to enter into the Call Wrap Up window. Pressing this button to end the present interaction signals that you are ready to accept new calls.

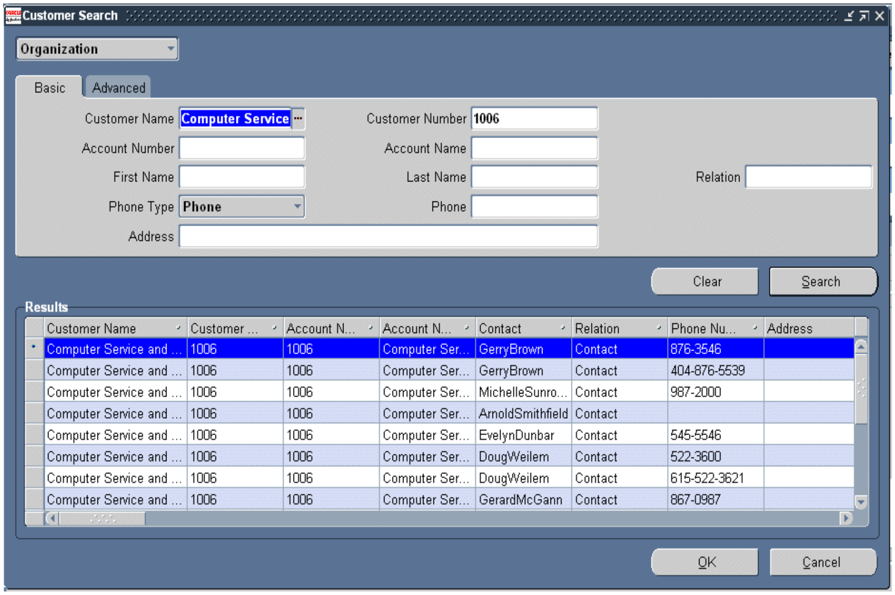
Agent On Break: Use this button to signal that you are on a break and are not available to accept calls. The button label changes to Agent Off Break. When you are ready to accept new calls, press this button to signal that you are back from the break.

Viewing Customer Information

To view customer information:

You may view caller details by searching for it or by using the List of Values available in the Contact Center window.

1. To search for customer information, use the following steps:
   a. Click on the Find toolbar button to open the Search window for querying up customer details. Choose Person, Organization, or Group as the Caller Type. Organization is the default entry if no choice is made.



b. Enter the name of the organization, or choose the name from the (LOV). Other fields such as contact, phone number, account number, address can also be entered to refine the search criteria.

Note that you can use the advanced search to achieve the same result.

c. Click on Search to display the results of the search.

d. Highlight any line displayed in the search results section and click on OK.

The Contact Center window displaying the relevant information opens.

Alternatively, you may use the LOV in the fields on the Caller Information region of the Contact Center window to bring up customer information.

2. To find caller information using the LOVs in the Contact Center window, do the following:

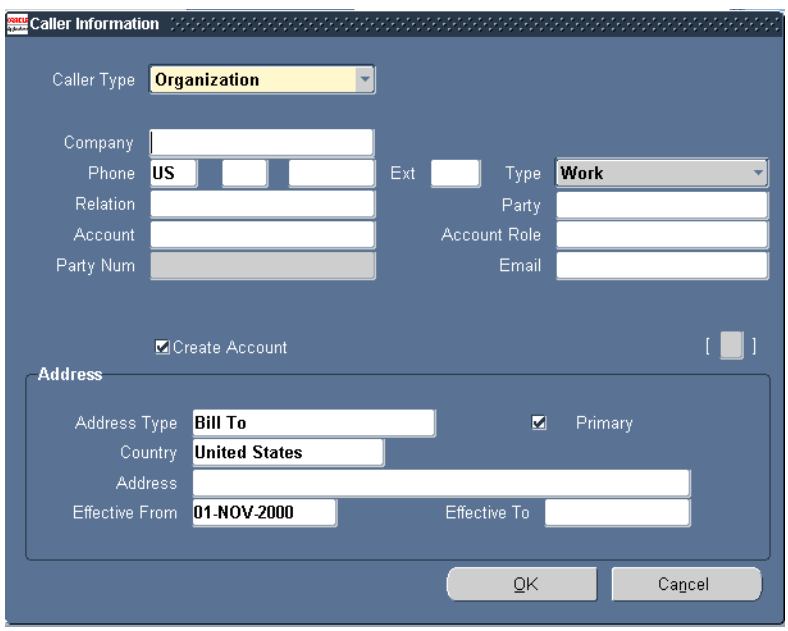
a. Choose a caller type to identify whether the customer is B2B or B2C. The Dashboard and Profile will display date immediately after you select a customer. Choose a caller from the LOV. All additional information such as relationship, address, party number are automatically displayed. In addition, all the tabs on the Contact Center window will also display the appropriate information.

3. All the customer information displayed can be updated in the Caller Information region, the Organization tab, Contact tab and the Address tab. Open the appropriate tab and continue accessing or entering information during the customer interaction.

Entering Caller Information for a New Customer

To create a new customer and an account:

1. Open the Contact Center window. For information on opening the Contact Center window, see: Starting the Contact Center.
2. Click on the New button. The Caller Information window appears.



3. Choose a caller type in the Caller Type field.
   - To create an organization, select Organization as the caller type.
   - To create a person, select Person as the caller type.
   - To create a contact, select Caller as the caller type.
   - To create a group, select Group as the caller type.

   The fields available to you depends on your selection in the Caller Type field. For example, if you select Group as the Caller Type, Group and Group Type fields are displayed.
4. Enter the relevant information such as address, phone number and email in the remaining fields.
5. The Address field is actually a Flexible Address format. Once you click on the field, the address flexfield window will appear where the user can enter all the address attributes such as Address Lines, City, State, Zipcode. The address flexfield attributes is based on what you define in the setup for each country. The default for the New window is US. Please refer to the Implementation guide for setup of address flexfield.
6. If you are creating a new caller for a customer, enter relation. Also choose the party (for example, Business World) you want to associate with the caller.

   The system automatically generates and assigns a Party Number to the caller. If the Account check box is selected, an account will also get created for the party.
7. Click OK to save the information to the customer master.

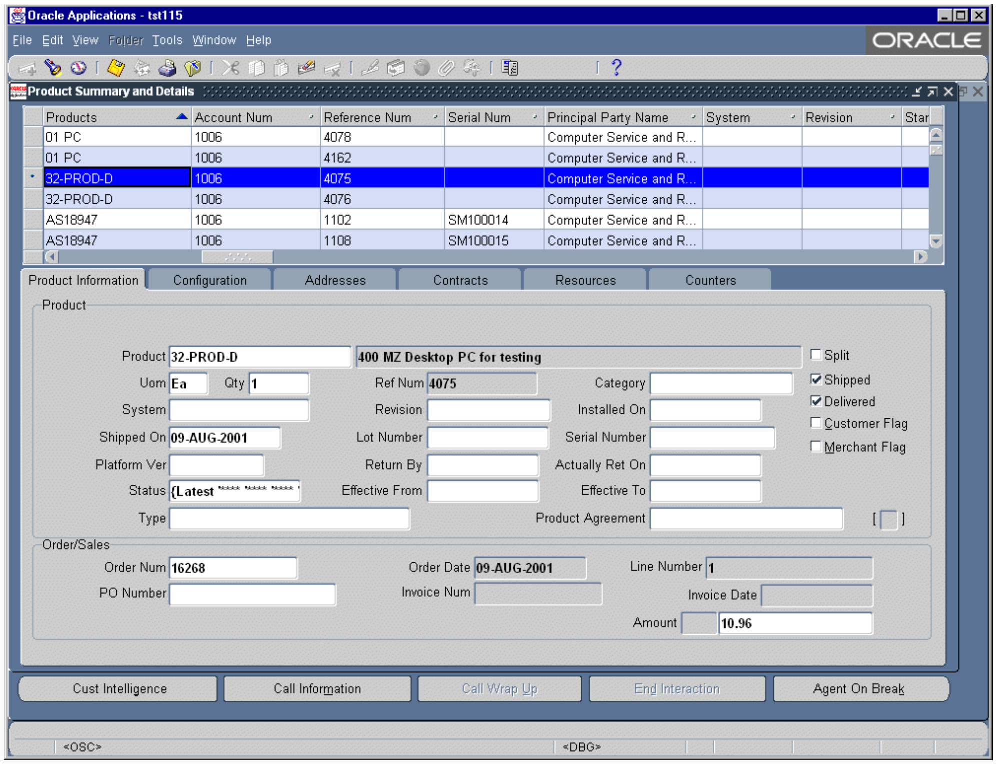
Viewing Customer Profile

Customer Profile information is displayed in the upper right hand corner of the Contact Center window. It summarizes customer information and also indicates if a customer is critical. The profile entries appearing in the customer profile are typically set up by a system administrator, and contain a set of predefined checks. These checks are configurable, as are the actual range values and value definitions. The check results are displayed by utilizing the Customer Profile Engine, which is a concurrent program.

Double-click on a key indicator to view a summary list of that profile check. For example, double-clicking on Open Service Request (a key indicator) displays the Drilldown List showing all open service requests for the selected customer type. This list displays information such as the service request number, incident date, problem code and resolution code. Double click on any line to view details of that service request. The Service Request window containing details of the service request opens. Click on the Refresh button to view the latest information for the customer.

Viewing Installed Base Information

Click the Installed Base button in the caller information block of the Contact Center window to view installed base information for the customer. The Product Summary and Details window, which lists all the products owned by the customer, opens.



Product Summary and Details window comprises the following six tabs:

- Product Information
- Configuration
- Addresses
- Contracts
- Resources
- Counters

Click on a tab to view information about the product selected in the spread-table at the top of the window.

Installed Base is a repository of detailed description of the products and services sold to the customers. It stores information on each specific instance of products and services sold to a customer. Installed Base enables you to track product installation details, product status and support service history.

Using the Installed Base, you can:

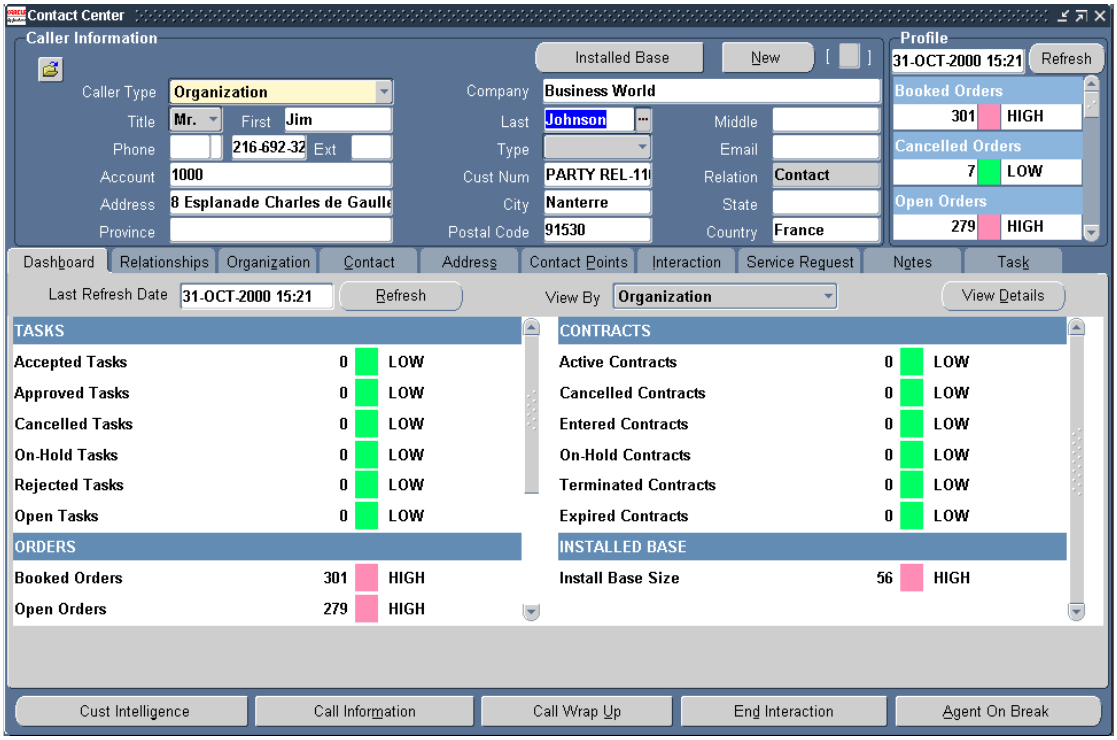
- Track, update, and maintain a customer’s product configuration (as built, as shipped or as maintained) by updating the parent and child assemblies whenever a new part or component is installed or replaced.
- View a tree structure showing all the parent and child assemblies of the product. Drill-down from a branch to view detailed information either in the standard user interface or in an HTML interface.
- Group customer products into Systems to facilitate the providing of service.
- Transfer product ownership among customers.

You can access the following functions from the Tools menu when the Product Summary and Details window is open.

- Quick Menu
- Revisions
- Split Products
- System Details
- Audit
- Counters Setup
- Events
- Languages
- Notes
- Service Request
- Repair History

Using the Dashboard Tab

The Dashboard tab of the Contact Center window provides a comprehensive overview of critical customer data, which familiarizes the agent with the customer. It displays concise customer information pertaining to tasks, contracts, orders, service, installed base as well as customer intelligence.



Information on the Dashboard tab is an extended version of the customer profile; it helps categorize profile checks. For example, all orders-related profile checks may be grouped together under the Orders category.

You can view the information for an organization, person, group, relationship or caller. You can view further details on any of the indicators by:

- Selecting an indicator and then clicking on the View Details button.
- Double-clicking on the indicator.

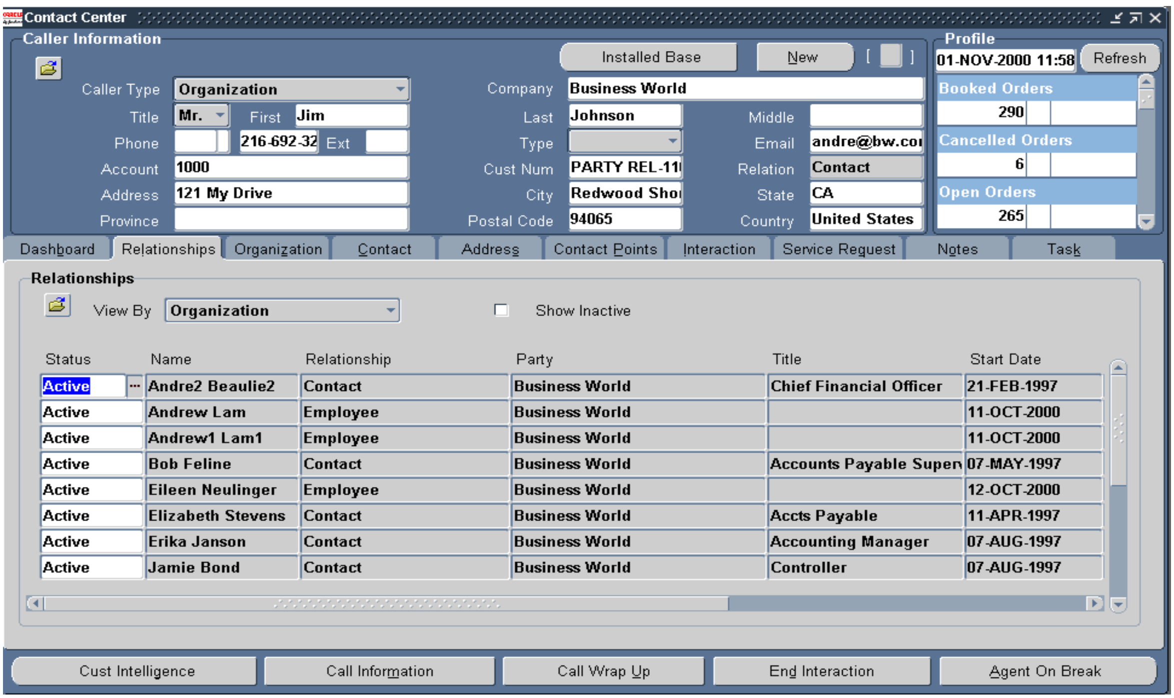
For example, to view a list of all accepted tasks, select the Accepted Tasks indicator and then click on the View Details button. A window listing summary information on all the accepted tasks appears.Click on any given record to view further information about a specific task.

Click Refresh to refresh the indicator values. This runs the Customer Profile Engine for the current customer and displays the latest transaction information.

Note: Order Management Forms are used for the drilldown for profiles relating to orders. Also for Depot Repair, queries are available for profiles but no drilldowns.

Using the Relationships Tab

The Relationships tab in the Contact Center window displays relationships that have been defined for the customer selected in the Caller Information region.



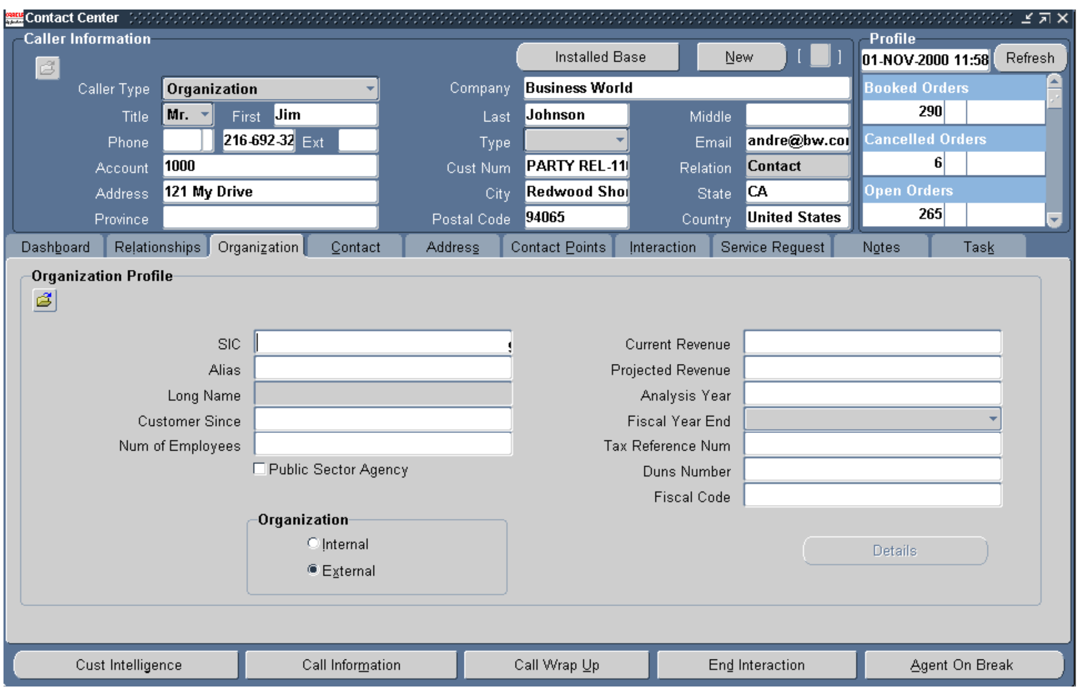
The user can also create new relationships from this tab and inactivate existing relationships by end -dating them. Since the Relationship Tab is a folder block, the user can use the folder functionality to personalize the appearence such as hide fields, move the position of the fields and the like.

Relationships can be viewed by organization, person or group. From the View By drop-down list, choose:

- Organization to display all the relationships for the organization.
- Person to show all the relationships for the person (in B2C situations).
- Group to display all the relationships for the group.
- Caller to view all relationships for the caller.

Using the Organization Tab

The Organization tab of the Contact Center window displays details of the organization hierarchy defined for the current customer. You can update the information in this tab and save it to the customer master.

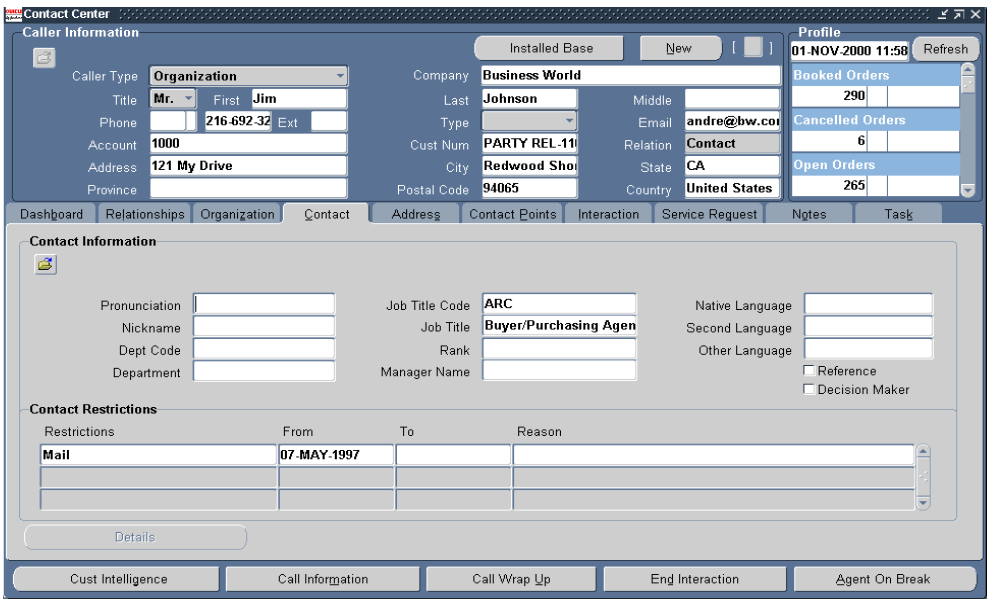


Using the Contact Tab

The Contact tab of the Contact Center window displays information about the customer contacts selected in the caller information region. Information presented in this tab include pronunciation of the contact's name, preferred language of communication, salutation, department the contact works for, job role, etc.

A few fields and buttons avialable in 11.5.1 release of the product have been removed such as Salutation, Job Role, Details button, New Contact button and Add To Organization button. Job Title code field has been added to the tab.

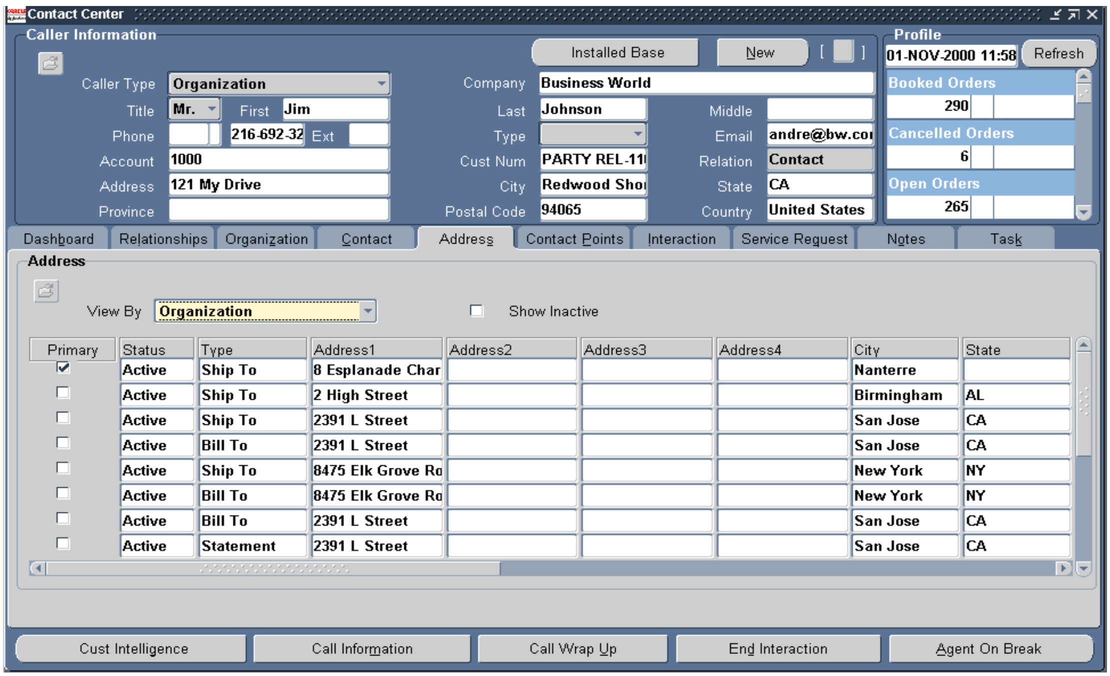
The Contact Restrictions region may be used as a guideline when initiating a callback to the contact. For example, it may indicate that the customer cannot be reached for a certain time period e.g. when he is out on vacation.



Using the Address Tab

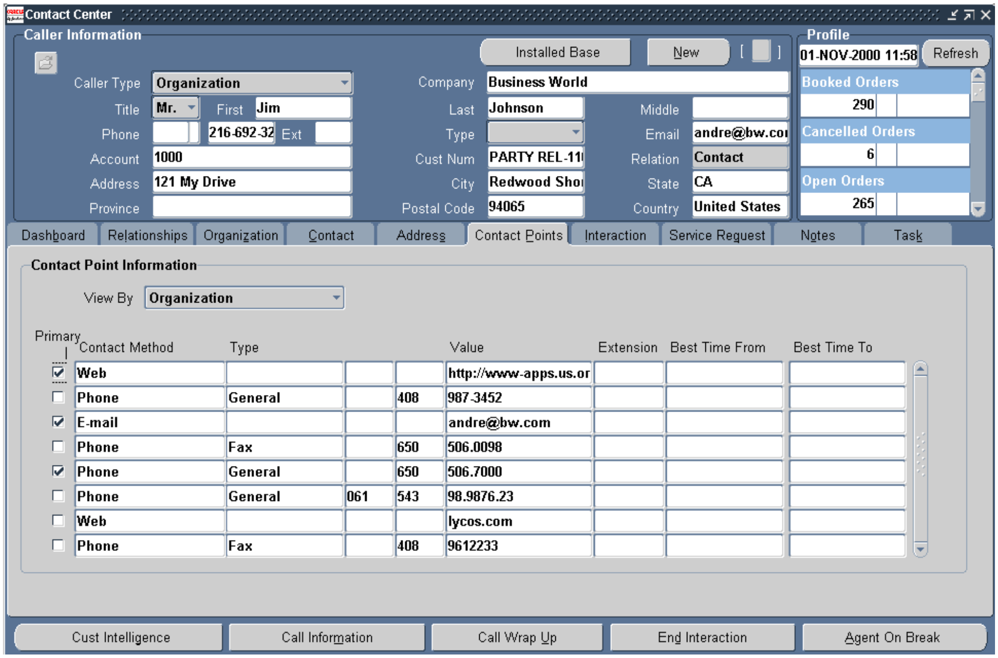
The Address tab in the Contact Center window displays the addresses associated with the customer, including the Ship To and Bill To address.

Addresses can be viewed by organization, person, group, relationship, or caller by selecting the appropriate option from the View By drop-down list. You may add new addresses or update existing addresses from the Address tab.



Using the Contact Points Tab

The user can view,create and update different contact touch points for the customer such as phone number, fax number, email, url and the like.



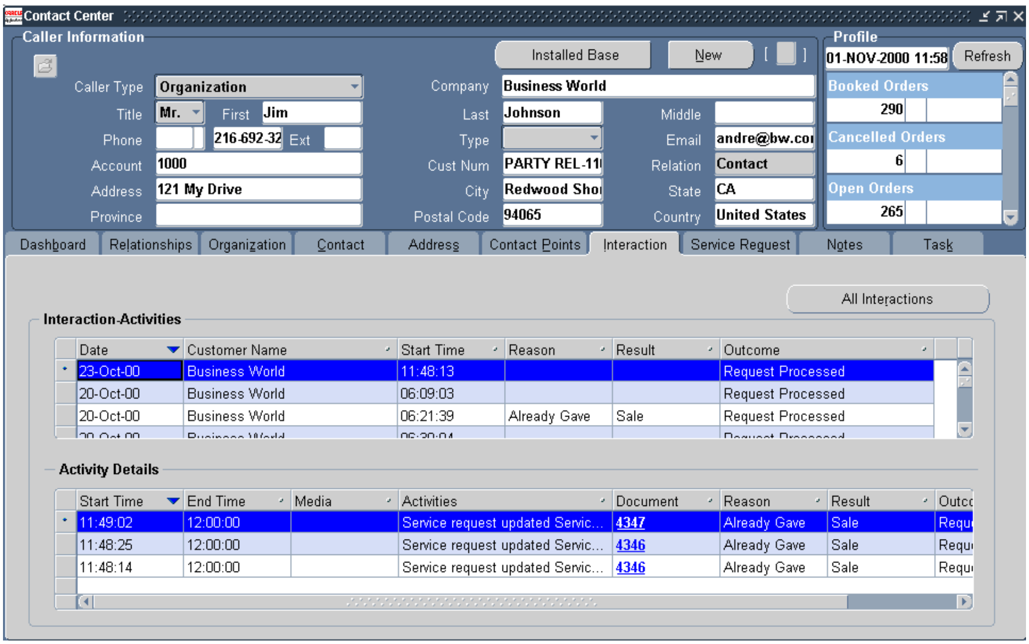
Using the Interaction Tab

The Interaction tab displays the recent interactions history for the selected customer.

An interaction can have multiple activities associated to it. For example, a customer called on August 1 would be displayed as an inbound call. The agent performed a number of tasks for the customer such as logged a service request and created a callback task for another agent to follow up on the call. All these would be logged as activities for that interaction.

Besides viewing details of recent customer interactions, you may drill down to view activities to which documents are associated. For example, you can drill down on the activity “Logging a service request” by double-clicking on the service request number. The Service Request window displaying the details will open.

Note: The Tab displayed an HGrid in 11.5.1 and it has since been replaced by spreadtable. The user can view the details of any interaction displayed in the Interaction Activity table by selecting it and the corresponding activity details would be displayed below.



Searching for a Specific Interaction

To search for a specific interaction:

1. In the Contact Center window, select the caller whose interaction history is to be viewed. For information on opening the contact Center window, see, Starting the Contact Center. For information on accessing caller information, see Viewing Customer Information.

2. Open the Interaction tab.

3. Click on the All Interactions button.

   The Customer Interaction History window opens. From this window, you can search for interactions or activities.

4. Enter appropriate search criteria, such as a range of dates, and click Search.

Working with Service Requests

The Service Request tab allows you to create a quick service request for the customer. The service request may or may not be related to a problem with a product. If the problem is product related, you can validate it against the Installed Base for the customer, or the item master.

From the Service Request tab, you can access Knowledge Base, a rich repository of solution sets, to resolve the customer problem during the very first customer interaction. The embedded knowledge management module, leveraging the Oracle Inter-Media technology, enables you to search, capture, and manage problem resolution information from existing service requests. It offers multiple search capabilities which allow you to find information easily.

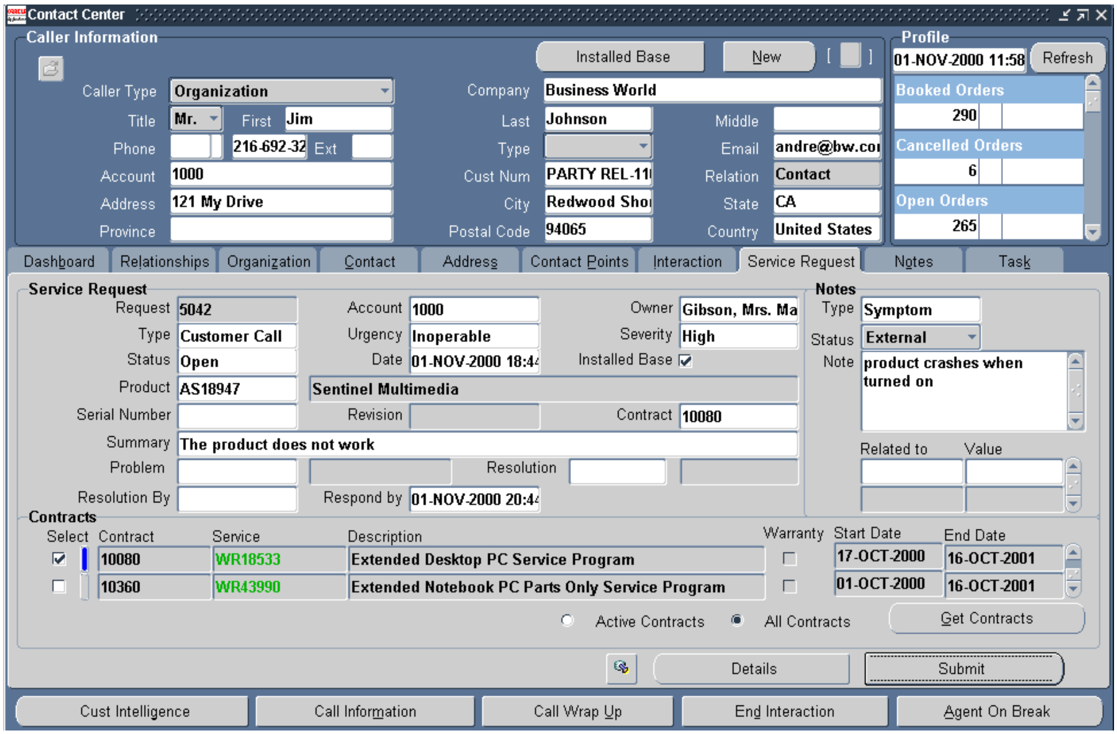
Contract entitlements of the customer can also be viewed from the Service Request tab. Based on the contracts in effect, you can render appropriate level of customer support.

To log complex service requests, use the Service Request window. To open this window, click on the Details button.

To create a service request:

1. From the Contact Center window, click the Service Request tab.
2. The Owner, Type, Severity, Urgency, Status, and Date fields are defaulted from the customer profile. You may change these values, if needed.
3. Select the Installed Base check box if the issue is about a customer product. If this check box is selected, the Product list of values will display only the products installed at the customer site, else it will show you all the inventory items.
4. Select a product and a serial number for it.
5. Enter a brief description of the problem in the Summary field. This field is mandatory.
6. Optionally choose a problem type in the Problem field, and a resolution type in the Resolution field.
7. Select the time frame for the resolution of the problem.
8. Optionally enter a note. To enter a note, do the following:
   a. Choose a note type and note status.
   b. Enter a note.
   c. In the Related to field, select the context to which the note is to be associated.
   d. In the Value field, select the value for the context you have selected.

For example, you can associate a note to a service request. Assuming that the service request number is 10152, you will select Service Request in the Related to field and 10152 in the Value field.



9. The contracts area shows the various contracts for the customer. Double-click the contract number to view coverage information for a particular contract. Select the contract that will apply to this customer request.

   The date in the Respond By field is defaulted based on the contract with the customer. You may change this date and enter a different expected resolution date.

10. Click Submit. The system generates a service request number and displays it in the Request field. You may give this number to the customer as reference.

Using the Notes Tab

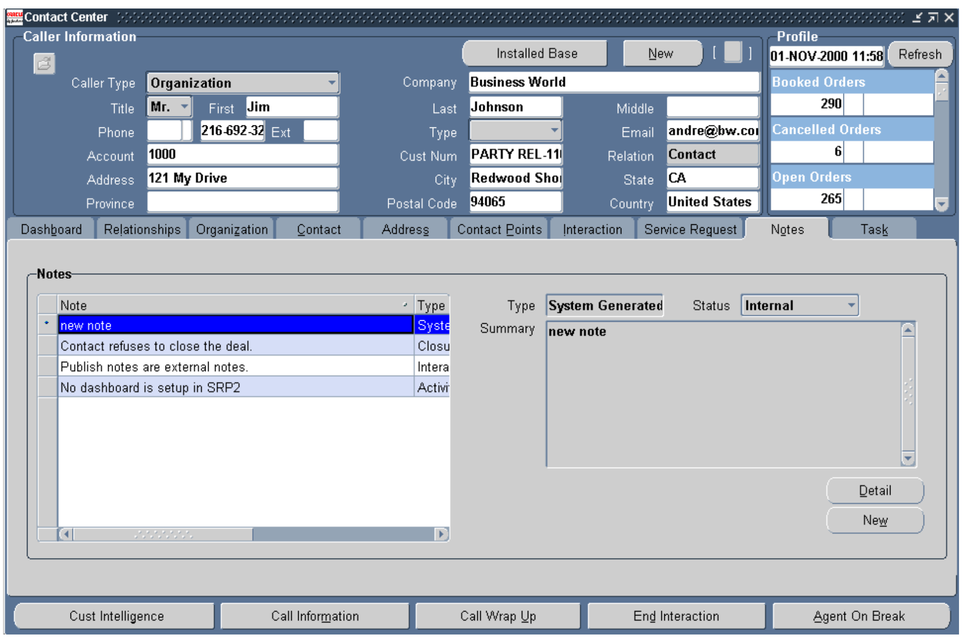
The Notes tab of the Contact Center window helps you create new notes on the current customer interaction. You can also access the existing notes from this tab.

Notes, if any, from previous interactions with the customer are displayed in the spread-table in the Notes tab. To view details of a note, select it from the spread-table. The contents of the note appear on the right. Click on the Details button to view additional lengthy descriptions, if any, associated with the note.

To create a note:

1. From the Contact Center window, click on the Notes tab.

Notes, if any, from previous interactions with the customer are displayed in the spread-table in the Notes tab.



2. Click on the New button to create a new note for the current customer interaction.

3. Select the type of note you want to create in the Type field.

4. Select the status for the note in the Status field.

5. Type in a summary of your customer interaction in the Summary text box.
6. If you want to enter more details about the interaction, click on the Detail button to open the Note Detail window. You can type in additional description in this window. Click the OK button to return to the Notes tab.
7. Save the note you have created.

Using the Tasks Tab

A task, defined in the simplest terms, is a work item. You can create tasks, for example, to call back a product or dispatch a service engineer to the customer site to fix a problem.

You can create tasks from the Tasks tab of the Contact Center window. You can also view previous tasks for the customer. To open the Task window, click the Task tab. Previous tasks for the customer are listed in the spread-table at the top of the tab, while details of the selected task are displayed in the fields below it.

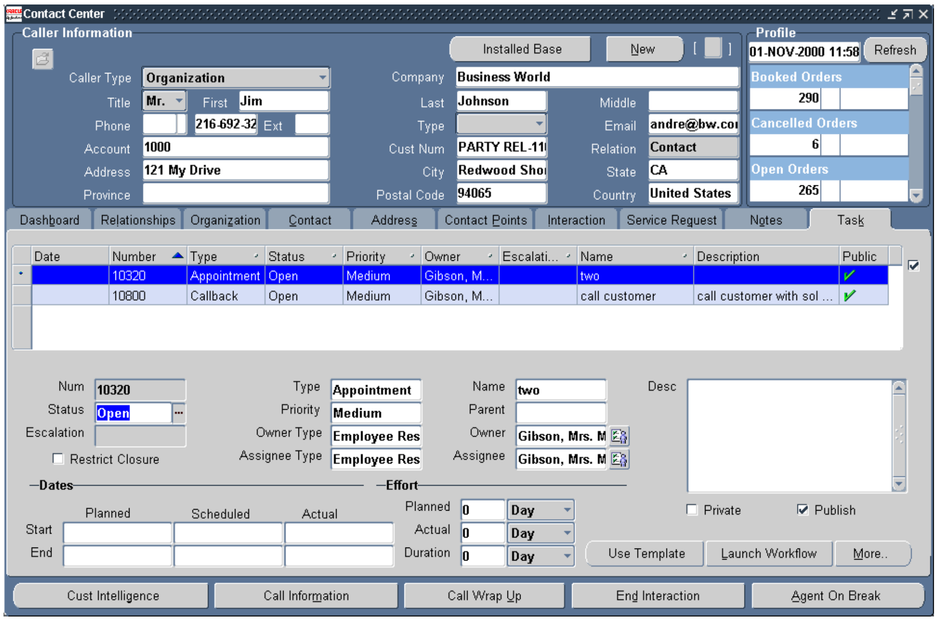
See Also:

- Creating a Task Manually
- Creating a Task Using Task Template
- Entering Task Details
- Defining Resource Requirements
- Setting Task Dependencies
- Linking Tasks to Souce Documentation
- Setting Recurrence Schedule
- Viewing Audit History for the Task

Creating a Task Manually

To create a task manually:

1. Click on the Task tab in the Contact Center window.



You can create a task directly from the Task tab by entering all the relevant information or using a template.

Values in fields such as Status, Type, Priority, Owner Type, Assignee Type, Owner, and Assignee are displayed by default based on the customer profile. You may use the List of Values associated with these fields to change the default values.

2. Enter a name for the task in the Name field.
3. If needed, in the Parent field, select a task to which this task is to be linked. Normally, you would select a parent task if the task you are creating is a follow up on another task.
4. In the Desc. field, enter a brief description about the task.
5. Select the Planned Start and End Dates.
6. You may use the default values in the Assignee and Owner fields or change them using the Assignment Manager. To access the Assignment Manager, click on the Assignment

Manager button next to the fields. The Assignment Manager looks up the Calendar, Territory Management and Resource Management modules to assign an appropriate resource for the job based on skill set, availability and assigned territory.

7. Save the task. On saving the task, a system generated task number is displayed in the Num field.

Creating a Task Using Task Template

To create a task using the task template:

1. Click on the Use Template button in the Task tab.

   The Create Tasks from Template Group window opens.

2. In the Template Group field, select the template group based on which the task is to be created. Values in the Owner Type and Owner fields are defaulted. You may change these values, if needed.

3. Select a source in the Source Name field.

4. Click on the Create Tasks button.

Click on the Launch Workflow button to start the workflow process associated with the current task.

Use the More button to open the Task Details window to enter details such as resource assignments, dependencies, references, contacts, etc.

Entering Task Details

The Task Detail window helps you enter details such as resource assignments, dependencies, references, contacts, etc. for the current task. To open the Task Details window, click on the More button in the Task tab of the Contact Center window.

Defining Resource Requirements

Define resources as the tools and/or personnel needed to complete a task. The task owner assigns and schedules the required resources after choosing the best available options.

To define resource Requirements:

1. Open the Task Detail window. The Resource tab is opened by default.

2. In the Resource Type field, select the resource type needed to solve the customer issue.

3. In the Unit field, enter a numeric value. This value determines the numbered amount of a particular resource.
4. Select the enabled check box.
5. Select from the list of values in the Type and Name fields.
6. Select the status of the task in the Status field.
7. If you want to schedule a resource, then select Schedule check box. To complete scheduling:
    a. Enter scheduled distance and duration values, and select a unit of measure.
    b. If you want to update actual schedule information, enter the actual Start and End dates.

    You may use the Assignment Manager to select and schedule the resource. To open the Assignment Manager, click the Assignment Manager button.
8. Click OK to save your work.

Setting Task Dependencies

Dependencies determine the order among tasks. When an action requires the creation of several tasks, setting a dependency for each task ensures the completion of a designated task before the start of another.

Note that you must create a task before you can set dependencies for it.

To set task dependencies:

1. From the Task Detail window, click on the Dependencies tab.
2. Select the dependent task number from the list of values in the Task Number field. The task name is automatically displayed.
3. Enter a numerical value in the Offset field. This value determines the time that separates the action of initial tasks from subsequent tasks. Use this feature to organize tasks with time-sensitive restrictions.
4. Select a unit of measure in the UOM field.
5. Click OK.

Linking Tasks to Source Documentation

Creating references to a source document allows you to reference pertinent background information. Source documentation could be the original request document that resulted in the creation of a task.

To link a task to its reference document:

1. From the Task Detail window, click on the References tab.
2. Select from the list of values in the Document Type field.
3. Enter the identification number of the source document in the Number field.
4. Click OK.

Setting Recurrence Schedule

If the task is to be performed on a regular basis, you may specify a daily, weekly, monthly, or yearly schedule.

To set recurrence schedule for the task:

1. From the Task Detail window, click on the Recurrences tab.
2. Select the frequency for the recurrence of the task by selecting the Daily, Weekly, Monthly, or Yearly button. Your selection determines the fields available in the Recurrences tab.
3. In the Start field, select the date after which the task is to be repeated.
4. Optionally, in the End field, select the date after which the task will not be performed.
5. Set the recurrence schedule.
6. Click OK.

Viewing Audit History for the Task

The Audit tab presents historical information on the changes that have been made to the task.

Using the Scripting Icon

Oracle Scripting provides scripted presentations designed to guide agents through their conversations with customers . A script consists of a series of questions . When the agent runs the script, the questions are displayed in panels. Based on the responses from the customers, the script can branch into a different series of questions. As the customer interacts with an agent by providing yes-or-no responses or by inquiring about products and services, the agent moves to appropriate text screens providing the information needed to respond fully and accurately.

Scripts can be integrated with forms and can also call database APIs.

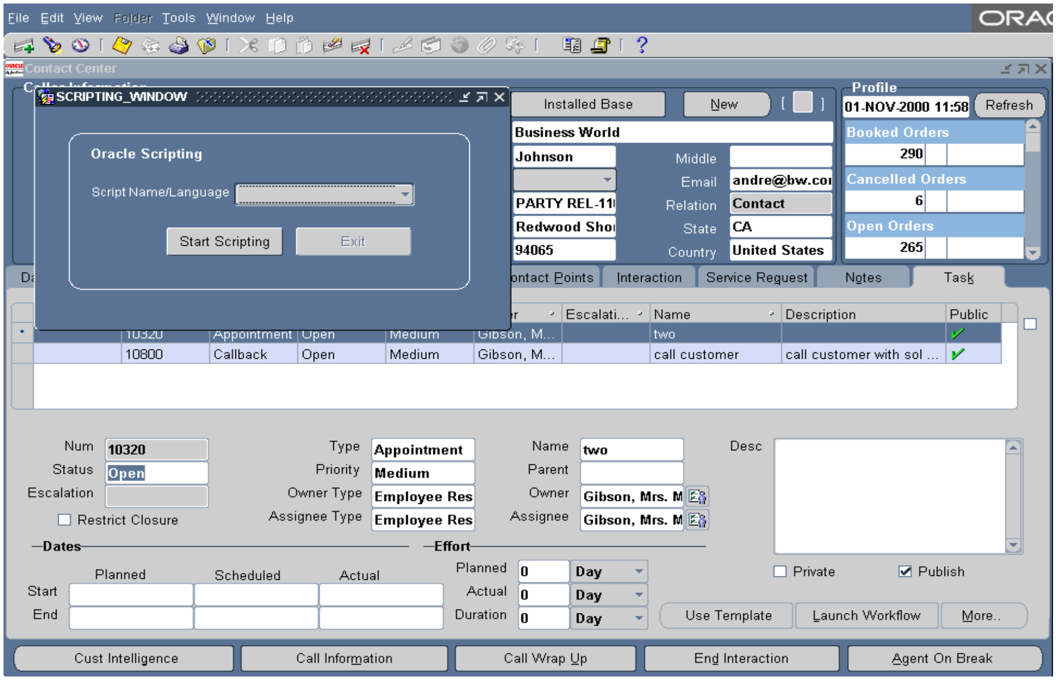
The contact center contains a "Script" Special menu. An Icon is also available on the toolbar. When "Script" is invoked, a small window is opened which displays a list of values of all the scripts that have been deployed in the database.. The agent can select any script from the List of values and then hit the start button to run the script.

You must have Oracle Scripting installed and the script deployed in the database using the scripting Author tool before you can run scripts from the Script tab. Oracle Customer Support provides a seeded script "cscccqsr" to gather the information required to create a service request.

To run the script:

1. From the Contact Center window, click on the Scripting icon on the tool bar or choose from the Tools menu.
2. Select a script from the drop down menu for the script field.
3. Click on the Start button to run the script.

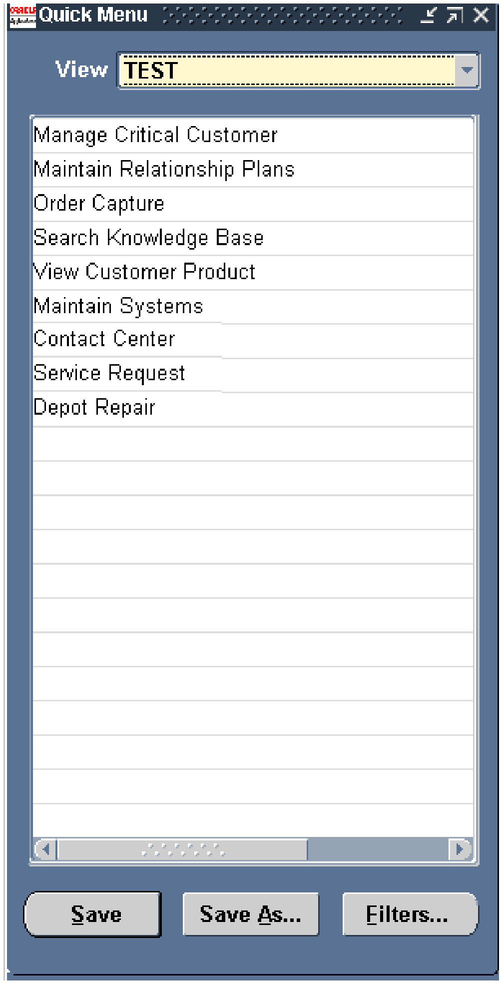
The script, would open a panel. You can read the panel to the customer and record the customer response. The script will then open other panels based on the customer response recorded by the agent. This process will continue till the last panel is reached and the script ends.



Using the Quick Menu

The Quick Menu enables you to easily navigate to other windows from the current window without losing reference. The use of quick menu provides avenues to improve your efficiency. To invoke quick menu, click on the Quick Menu icon on the tool bar.

Quick menu helps you store search criteria in windows from which the search functionality is available. Using quick menu, you can store frequently used criteria and open up windows more quickly than by manually entering the search criteria and then searching for records.



The following functions can be accessed from the quick menu :

- Manage Critical Customer
- Maintain Relationship Plans
- Order Capture
- Search Knowledge Base
- View Customer Products

- Maitain Systems
- Contact Center
- Enter Service Requests
- Depot Repair

For the quick menu functions to work properly, you should save the folder the first time you access the quick menu. Click on the Save As button and enter the appropriate folder name and save your changes. If the user does not need to use some of the form functions available from the quick menu, he can remove it from the "quick menu " menu at the responsiblity level. The user does not have any ability to add other forms to the quick menu.

Managing Critical Customers

Oracle Customer Care allows organizations to define rules governing the criticality of their customer base. A threshold level can be defined for different profile checks which when crossed would flag the customer as critical. The agent can then initiate proper action to resolve the situation or by escalating the resolution process.

The Critical Customer Management feature of Oracle Customer Care enables agents to manually override the criticality of the customer. For example, there are situations when the profile engine may not determine a customer as being critical based on the rules setup, but the customer still needs to be flagged as critical. The agent can override the system-determined criticality in order to deal with temporary or exceptional situations.

Use the Override Customer Criticality window to view historical information including whether the system determined criticality was overridden, the reason for the override, the user name of the agent who changed the criticality, the date when it was changed and the original system determined criticality. You can also manually override the criticality of a customer from this window.

See Also:

- Finding Critical Customers
- Overriding the Criticality of a Customer

Finding Critical Customers

To find a customer whose criticality was overridden:

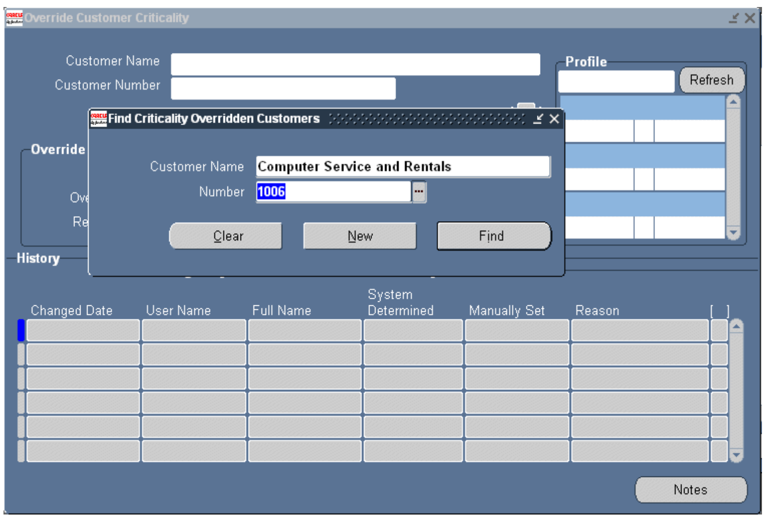
1. From the Customer Support responsibility, open the Find Criticality Overridden Customers window using the following navigation path:

   Customer Management—>Critical Customer Management

2. Enter either the customer name or number.

3. Click on the Find button.

   If the customer is flagged as being critical, details will be displayed in the Override Customer Criticality window.



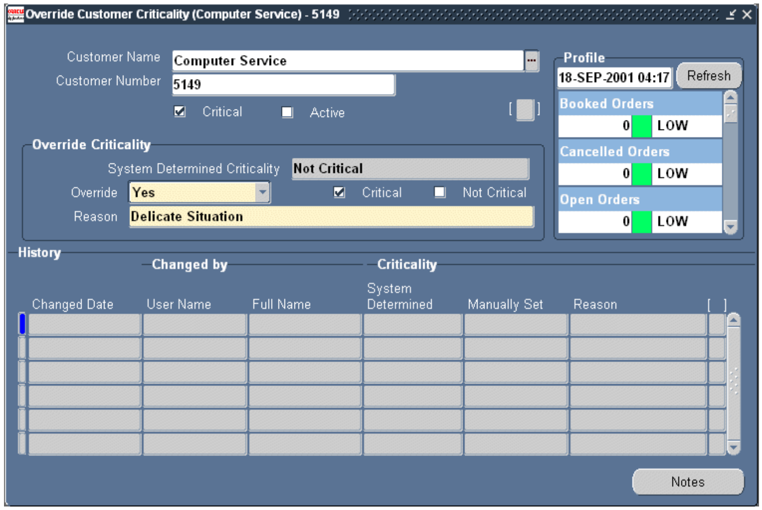
Overriding the Criticality of a customer

To override criticality of a customer:

1. From the Customer Support responsibility, open the Find Criticality Overridden Customers window using the following navigation path:

   Customer Management—>Critical Customer Management

2. Click on the New button to open the Override Customer Criticality window.



3. In the Override Criticality section, select Yes in the Override field. Select an appropriate reason in the Reason field.

4. Enter additional notes about this over ride in the Notes window. To open the Notes window, click the Notes button.

5. Save the changes you made.

   The changes you have made are recorded in the History section of the window.

Using Relationship Plans

The Relationship Plans module is used for taking proactive and reactive care of the customers. This module enhances real-time responses to customer concerns with a view to improving customer loyalty, retention and profitability.

The Relationship Plans module leverages the Events module to define complex conditions for relationship plans. It associates the outcome to real-time processes such as displaying alerts for the user, running a script to create a service request, and running background processes for creating tasks and sending notifications.

Relationship plans may be personalized to target different segments of customers: B2B or B2C. Plans can be defined at the account or customer level to target the customers with greater efficacy.

Relationship plans are automatically assigned to different customers based on the plan header condition, which leverages the Customer Profile module. Customers who fulfill the profile variable criteria used in the plans header are automatically assigned the appropriate plan.

The Plan Assignment Engine handles all automatic plan assignment to the customer's plan portfolio. This engine checks all the plans that are part of the customer's plan portfolio. If a plan is invalid, the engine removes it from the portfolio; it adds new plans if valid for the customer. The Plan Assignment Engine is a concurrent program which is run when the Customer Profile Engine is run. It can also be executed by submitting a concurrent request.

See Also

- Finding Relationship Plans for a Customer
- Working with Relationship Plans
- Adding and Removing Relationship Plans
- Creating a Relationship Plan
- Viewing Relationship Plan Audit History
- Viewing/modifying a Relationship Plan

Finding Relationship Plans for a Customer

To find relationship plans:

1. Perform a search to identify the relationship plans assigned to the customer's plan portfolio. Use the following procedure to search for relationship plans:

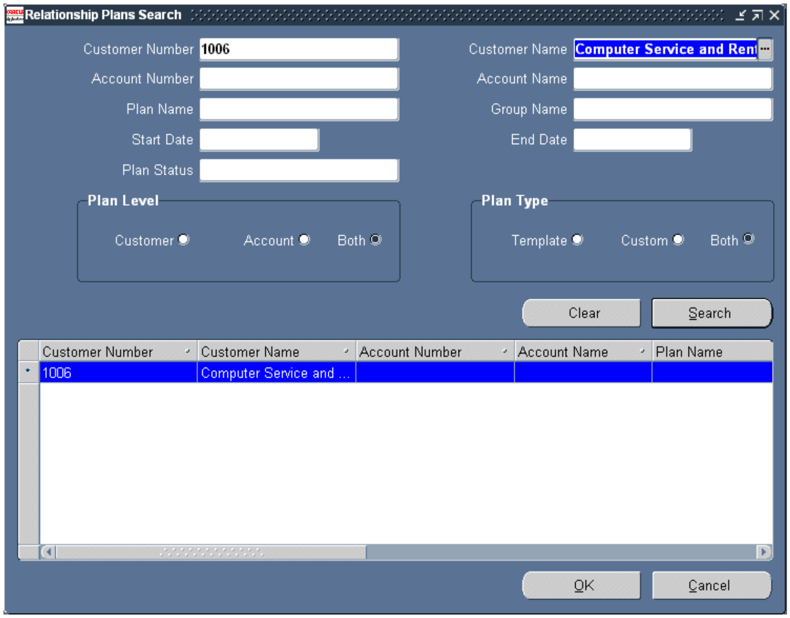
   a. From the Customer Support responsibility, open the Relationship Plans Search window using the following navigation path:

      Customer Management—>Relationship Plans Management

   b. Enter search criteria. Customer Name, Customer Number, Account Number, Account Name, Plan Name, etc. may be used as the search criteria.

   c. Click on the Search button.

      Search results are displayed in the spread-table at the bottom of the Relationship Plans Search window.



2. Select a plan from the spread-table and click on OK to view details in the Plans Summary window.

Working with Relationship Plans

By default, the Plans Summary window displays the customer's plan portfolio. Customer and account level plans are depicted in the hierarchy tree. Expand the hierarchy to view a summary of all the plans for the customer. Select a plan from the hierarchy to view its details in the spread-table. To view details of all the plans for the customer, select the customer name from the hierarchy tree. Click on the Inquiry tab to view all the customers to whom the current plan has been assigned.

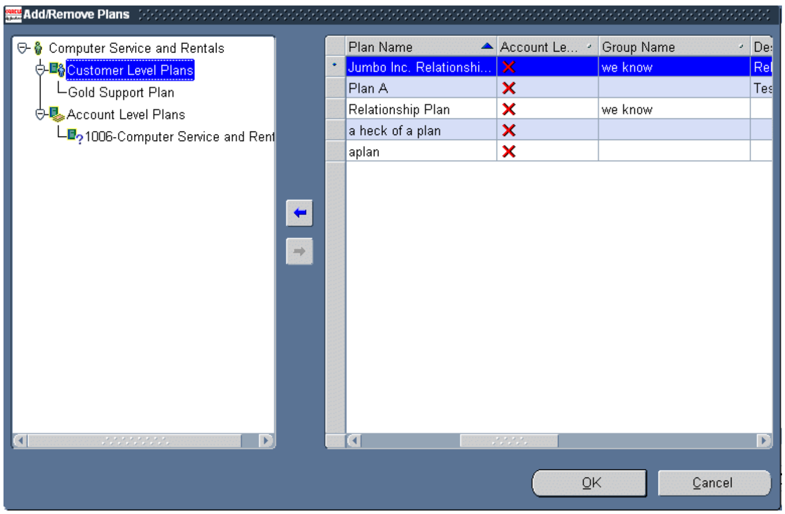
From the Plans Summary window, you can:

- Add or remove plans
- Create a relationship plan
- View the audit history for a plan
- View and modify details of a plan

Adding and Removing Relationship Plans

To add/remove relationship plans:

1. Open the Plans Summary window for the customer. See Finding Relationship Plans for a Customer for details.
2. Click on the Add/Remove Plans button. The Add/Remove Plans window opens.



3. Click on the appropriate node on the hierarchy tree to view a list of available plans. For example, to list all customer level plans, select the Customer Level Plans node.

   Plans currently assigned to the customer are listed below the selected node. Plans available to be assigned to the customer are listed in the spread-table.
4. To assign a plan to the customer:
   a. From the spread-table, select the plan you want to assign to the customer.
   b. Click the Left Arrow button.

      The plan gets listed under the current node.
5. To remove a plan currently assigned to the customer:
   a. From the hierarchy tree, select the plan you want to remove.
   b. Click the Right Arrow button.

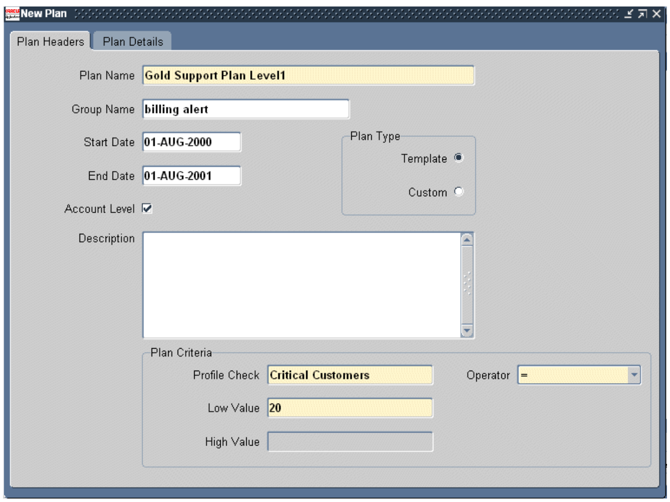
      The plan is deleted from under the current node.

6. Click the OK button to save your work and return to the Plans Summary window.

Creating a Relationship Plan

To create a relationship plan:

1. Open the Plans Summary window for the customer. See Finding Relationship Plans for a Customer for details.
2. Click on the New button. The New Plan window opens.
3. In the Plan Header tab enter the Plan Name (mandatory), Group Name, Start Date, End Date and Description.



4. 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)
5. Select Account level check box if you want to create a plan that is valid at account level.
6. Save the plan.

7. Open the Plan Details tab.
8. Click on the New Condition button. The Condition window opens.
9. Create the appropriate condition for the relationship plan you are defining.
10. Save the conditions and close the Condition window.
11. Save the relationship plan you have created.

Reference:

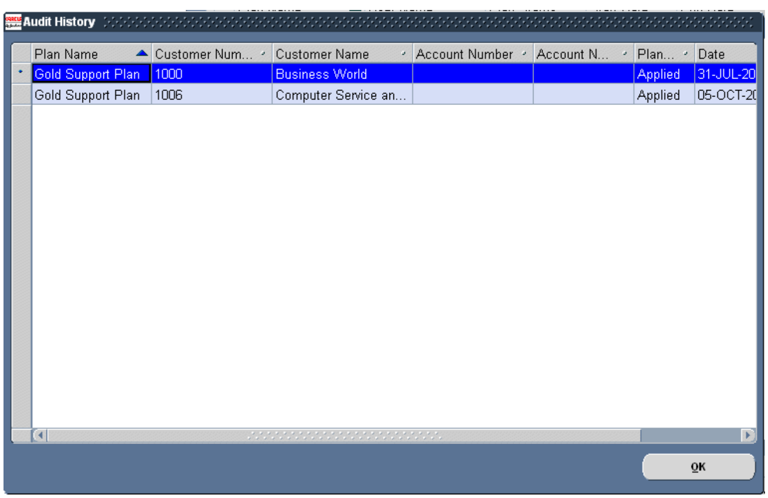
See Defining Relationship Plans section in Oracle Customer Care Implementation Guide

Viewing Relationship Plan Audit History

The Audit History window presents audit information for all relationship plans. It indicates when a plan was added or removed for the customer.

To view audit history:

1. Open the Plans Summary window. See Finding Relationship Plans for a Customer for details.
2. Click on the Audit button.



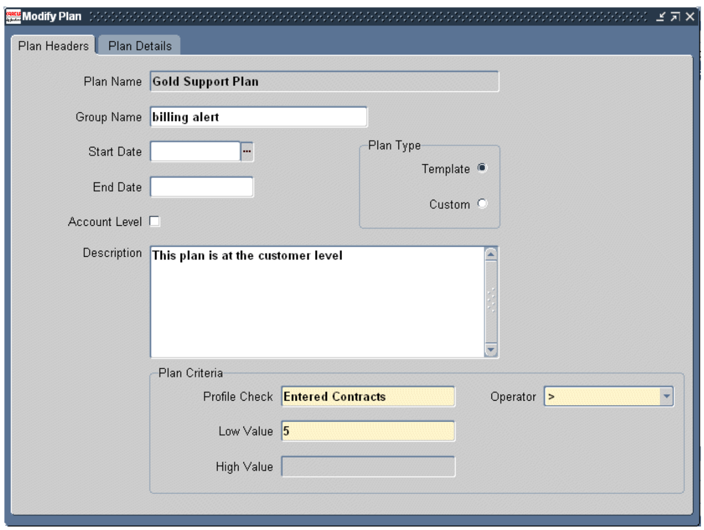
Viewing/modifying a Relationship Plan

Plans are not customer specific. Any changes you make to a plan will be reflected for all the customers to whom the plan is assigned.

To view/modify a relationship plan:

1. Open the Plans Summary window. See Finding Relationship Plans for a Customer for details.
2. Select the plan whose details you want to view or modify.
3. Click on the Details/Modify button.

   The Modify Plan window opens. This window displays current plan details.



4. If necessary, modify the information in the Plan Headers tab. Note that you cannot change the name of the plan.
5. Open the Plan Details tab.
6. If needed, add a new condition or modify existing condition(s).
7. Save the changes you have made.

Reference:

Defining Relationship Plans section in the Oracle Customer Care Implementation Guide