

Oracle® CRM Foundation

Concepts and Procedures

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Oracle CRM Foundation Concepts and Procedures, Release 11*i*

Part No. A86099-02

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Preface

Welcome to the **Oracle Customer Relationship Management, Release 11i**, suite of applications.

This Concepts and Procedures provides information and instructions to help you work effectively with Oracle CRM Foundation.

This preface explains how Concepts and Procedures 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:

- Understanding of the company business processes.
- Knowledge of products and services as defined by your marketing policies.
- Basic understanding of Oracle and Developer/2000.
- Background in SQL, PL/SQL, SQL*Plus programming.

Structure

This manual is a compilation of the topics in the online help for Oracle CRM Oracle Foundation components. It contains the following topic sections:

“Understanding” topics provide 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” topics provide process-oriented, task-based procedures for using the application to perform essential business tasks.

“Administering” topics provide task-based procedures for required for ongoing system maintenance and includes information on administration tools and utilities.

Related Documents

For more information, see the following manuals:

- *Oracle CRM Foundation Implementation Guide*
- *Oracle CRM Foundation Technical Reference Manual*

Using the Oracle System Administrator Console

This topic group provides overviews of the Oracle System Administrator Console, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle applications.

Logging into Oracle Applications

The login window provides fields where every user must enter a login user ID and password. After you login, you can use Oracle applications. Use this procedure to login to Oracle applications. If you are not already registered, see [Registering as a New User](#).

Note: If you do not have a login user ID or password, you must register as a new user.

Steps

1. Enter your user ID and password in the appropriate fields
2. Click GO.

The next window you see is your personal window. Use this window to navigate to the Oracle applications you want to use.

Guidelines

If you do not have access to all the applications you want to use, contact your system administrator.

Registering as a New User

A user is any person who performs activities on one or more Oracle applications. All registered users have a user ID and password that they enter on the login window to gain access to the applications. Use this procedure to register yourself as a user and define your user password.

Steps

1. In the Welcome window, click **Register Here**.

The User Registration window opens.

2. Enter the required information in every field marked with an asterisk (*). Indicate whether you are an End user or a Business user.

An End user is an individual that is not representing an organization.

A Business user is an individual that is representing an organization.

3. Click **Submit** when you have filled all the fields.

If you are an End user, you are now registered.

If you are a Business user, a new window asks you to identify your company.

4. If you are a Business user, continue to enter all required information and click **Submit** when you are finished.

You are now a registered user.

Defining a Key Name and Value

A property is a combination of a Key and a Value list. A Key is a string, or a sequence of letters, numbers, digits, or symbols. A Value list is an ordered list of one or more strings.

The properties in the System Administrator Console are either:

- System Default Properties, also known as JTF properties
- Application Properties

JTF properties can affect the behavior of all Oracle CRM modules. Application properties typically affect the behavior of a particular module. The two- or three-letter short code that precedes the property name indicates the module to which it is associated. If a JTF property and an Application property have the same name, the Application property name typically hides the name of the TF property.

An application administrator may or may not have permission to see or edit either JTF properties or Application properties. Access to all properties is controlled by two permissions:

- PROPERTY_READ grants permission to read properties
- PROPERTY_UPDATE grants permission to read, create, delete and modify properties

The system administrator may have Update permissions for all JTF properties, but only Read permission for some CRM modules. An application administrator may have Update permission for all the properties of one CRM module, but only Read permission for all JTF properties.

You can define a key name and a corresponding value list if you have Update permission for the property. Use this procedure to define a new Key and Value.

Note: Depending on your role and permissions, you may be able to define a Key and Value list for one or all applications.

Steps

1. Log in to the System Administrator Console as the system administrator or as an application administrator.

2. Select the Advanced tab and click **Properties**.

The View list displays the two-or three-letter code of all the applications to which you have access. If you have access to the JTF code, you can define a Key and Value for all CRM applications.

3. In the View list, select the three-letter code of the application for which you want to define a Key and Value, then click **Create**.

The Create Key window opens.

4. Enter the keyname in the Key field.

The keyname must be unique, such as `guest_user`.

5. Use the Value fields to enter the new user's name as it will be used during login.

6. Click **Update** to add the keyname and value to the list of properties.

See also

[Table of Module Codes](#)

[Assigning Roles to a User](#)

Registration Approvals

Perform the following steps to approve a business user request for registration.

Prerequisites

At least one business user request must be pending for these screens to be active.

Steps

1. Log in to the System Administrator Console as the system administrator.
2. Select the Responsibilities tab, and then the Approvals subtab, if it is not already selected.

The Pending Requests screen opens, displaying any pending approval requests.
3. Select a user name and double click it to open the Request Details screen.

This screen contains information on both the user and his/her company. The user information is editable.
4. Modify the user information, if desired, then select **Update** to save your changes.
5. Select **Assign Accounts** to assign accounts to the user as necessary.

The **Associated Accounts** screen opens. A checked account indicates that the user has access to that account. Check, and unchecked boxes to assign an account to a user. When finished, select **Update** to save these changes and return to the previous window.
6. Select one of the following options:
 - **Accept User** to approve the request
 - **Reject User** to reject the request
 - **Return to Summary** to return to the previous screen without taking any action
7. When prompted, enter any comments that you wish.
8. Select **Submit** to save your comments.

Assigning Roles to a User

The system administrator can assign one or more roles to any registered user. A role is a position or job description that is defined on the Security tab. Roles may be assigned on the basis of:

- The application that the user needs to use
- Responsibilities assigned to the user

Steps

1. Log in to the System Administrator Console as the system administrator.
2. Select the User tab and click **Assign Roles**.
A Search field appears on the window.
3. Enter the first one or two letters of the user's name in the Search field and click **Search**.
The search results show a list of user names that begin with the letters you entered. Click **Next**, **Last**, **Previous** or **First** to review all the user names in the list.
4. Click the user name to which you want to assign roles.
The Role Mapping window opens to display two lists: Available Roles and Assigned Roles.
5. Select a role from one list and click > or < to move it to the opposite list.
 - Click >> to move all Available Roles onto the Assigned Roles list.
 - Click << to move all Assigned Roles onto the Available Roles list.
6. Click **Update** to complete the task of assigning roles.

See also

[Defining Roles](#)

Defining Permissions

A permission consists of a permission name and its definition. A permission is an activity that can be performed only with administrative approval. Most Business and End users do not perform these activities. Users who can perform these activities have been assigned a role that includes one or more permissions.

Follow this procedure to define a permission.

WARNING! Do not remove the pre-defined permissions that are built into the System Administration Console. These pre-defined permissions are essential for stable and reliable performance of all Oracle CRM modules. Removal of these permissions could cause serious or fatal performance problems.

Steps

1. Log in to the System Administrator Console as the system administrator.
2. Select the Security tab and click **Permissions**.

The Permissions window displays all permissions that have been defined. Permission names are displayed in alphabetical order. The first two or three letters of the permission name indicates the name of the module that the activity is associated with. Click **Next**, **Last**, **First** or **Previous** to review all the permissions.

3. Enter a new permission name in an empty Name field.
The first two or three letters of the name should correspond to the two- or three-letter code of a module. Each permission name must be unique.
4. Enter a description of the activity in the Description field.
5. Click Update to complete the definition.

The new permission name is automatically filed in alphabetical order.

See also

[Defining Roles](#)

[Table of Module Codes](#)

Table of Module Codes

Each CRM module has a two- or three-letter code. These codes are used on many of the System Administration Console window, including Permissions, Properties, and Roles. The following table lists the module codes with the module names they represent.

Module Code	Module Name
CS	Oracle Field Service
CSS	Oracle Support, includes the Defect Management System
IBE	Oracle iStore
IBU	Oracle iSupport
IBY	Oracle iPayment
IEM	Oracle eMail Center
JTF	Oracle CRM Foundation

Defining Roles

In Oracle CRM applications, roles provide a method of grouping permissions and therefore they impart a type of security. A role may be a specific position or job description within the enterprise. Each role may be associated with Permissions and Data Access.

Follow this procedure to define a role and map permissions to the role.

Steps

1. Log in to the System Administrator Console as the system administrator.
2. Select the Security tab and click **Roles**.

The Roles window displays all roles that have been defined. Role names are displayed in alphabetical order. The first two or three letters of the role name indicates the name of the module that the activity is associated with. Click **Next**, **Last**, **First** or **Previous** to review all the roles

3. Enter a new role name in an empty Name field.

The first two or three letters of the name should correspond to the two- or three-letter code of a module. Each role name must be unique.

4. Enter a description of the role in the Description field.
5. Click **Update** to complete the definition.

The new role name is automatically filed in alphabetical order.
6. Find the new role in the list of role names and click the role name.

The Role Mapping window opens to display two lists: Available Permissions and Assigned Permissions. The Role Name appears above the lists.
7. Select a permission from one list and click > or < to move it to the opposite list.
 - Click >> to move all Available Permissions onto the Assigned Permissions list.
 - Click << to move all Assigned Permissions onto the Available Permissions list.
8. Click **Update** to complete the role mapping.

See also

[Table of Module Codes](#)

[Defining Permissions](#)

Setting Up Default Responsibilities

A responsibility in Oracle Applications is a way to control access to menus. Each responsibility is tied to an application. When users register, you can grant them access to a default responsibility, so that they can begin using the application right away. During installation and implementation, use Oracle Applications Forms to determine the Default Application ID and Default Responsibility ID for each Oracle CRM module.

The Oracle System Administrator Console provides two types of users:

- Business users—individuals who represent an organization
- End users—individuals who are not associated with an organization

In the System Administrator Console, you can associate each user type to one Default Application ID and one Default Responsibility ID. Use the following procedure to make these associations. The default responsibility can allow access to one or more CRM modules with minimal permissions.

Steps

1. Log in to the System Administrator Console as the system administrator.
2. Select the Setup tab and click **Default Responsibilities**.
The Register Default Responsibility window opens.
3. Choose a user type and enter the appropriate IDs.
4. Click **Submit** to complete the setup.

See also

[Defining Permissions](#)

[Setting up Default Roles](#)

Setting Up Default Roles

You can set up customized default roles for your enterprise, each with its own set of permissions or privileges. Then, as a security measure, you can associate default roles that are granted to a user type during user registration.

The Oracle System Administrator Console provides two types of users:

- Business users—individuals who represent an organization
- End users—individuals who are not associated with an organization

Note: When you set up default roles for all Oracle CRM modules, use CRM_DOMAIN. this is the default domain for all roles and permissions.

Use the following procedure to specify the default roles to be assigned to a user type.

Steps

1. Log in to the System Administrator Console as the system administrator.
2. Select the Setup tab and click **Default Roles**.

The Select Account Type and Domain window opens. This window contains two lists: Account Type and Domains.

3. Select one item in the Account Type window, select CRM_DOMAIN in the Domain window and click **Next**.

The Groups window displays two lists: Available Roles and Assigned Roles.

4. Select one or more Available Roles and click **>** to move it to the Assigned Roles list.

The roles in the Assigned Roles list will be assigned to the user type you selected in step 3.

- Click **>>** to move all Available Roles onto the Assigned Roles list.
- Click **<<** to move all Assigned Roles onto the Available Roles list.

5. Click **Update** to complete the role default assignment.

See also

[Setting Up Default Responsibilities](#)

[Defining Roles](#)

Overview of Extensibilities

A profile is a way to store information on the database tables. After the database is deployed, you may find you need to define new properties to store additional information. The System Administrator can define new profiles. Once a new profile has been added, other applications can share the profile by subscribing to it, or the profile can be reserved for a single application.

Each profile is a logical extension of a base table and has a base property definition that captures the additional information. You can also add extended properties, to capture more information about a base property. Property rules define the conditions that must exist to make the base properties valid.

See also

[Creating a Property](#)

[Subscribing to a Profile](#)

[Modifying the Base Properties of a Profile](#)

[Adding Extended Properties](#)

[Creating Property Rules](#)

Creating a Property

Each profile has base properties that govern how the object appears in the application and if there are any required values the user must use to describe the object. Use this procedure to create properties for a profile.

Prerequisites

Profiles must already exist in the base table.

Steps

1. Log in to the System Administrator Console as the system administrator.
2. Select the Advance tab and click **Extensibilities**.

The Profiles window displays Base Table Names and Profile Names.

3. Click the Profile Name for which you are creating a property.

The Base Property Name window displays the existing properties for the profile you selected.

4. Click **Add**.

The Create Property window displays fields you can use to define the new property. You must enter information in the fields marked with an asterisk (*).

- Use the Property Disabled field to indicate whether or not the property appears on the application window.
- Use the Required field to indicate whether or not users must define a value for this property.

5. Click **Create** to complete the property creation.

See also

[Subscribing to a Profile](#)

[Adding Extended Properties](#)

[Creating Property Rules](#)

Subscribing to a Profile

Multiple applications can share, or subscribe to, a profile. When applications share a profile, they share access to information about the object associated to the profile.

Prerequisites

A profile must exist and it must allow sharing.

Steps

1. Log in to the System Administrator Console as the application administrator for the application that wants to share a profile.
2. Select the Advance tab and click **Extensibilities**.
The Profiles window displays Base Table Names and Profile Names.
3. In the list of Profile Names, find the profile you want to share.
If you can subscribe to the profile, the Subscribed column displays a white box.
4. Select the Subscribed box next to the name of the profile you want to share.
5. Click Subscribe to complete the subscription.

See also

[Overview of Extensibilities](#)

Modifying the Base Properties of a Profile

The base properties of a profile define the property and how it appears in the application window. Use the following procedure to modify the base properties of a profile.

Prerequisite

The profile must exist and have base properties that can be modified.

Steps

1. Log in to the System Administrator Console as the application administrator for the application that subscribes to the profile.
2. Select the Advance tab and click **Extensibilities**.
The Profiles window displays Base Table Names and Profile Names.
3. Click the Profile Name that has base properties you want to modify.
The Base Property Name window displays the base properties associated to the selected profile.

4. Click the Base Property Name you want to modify.

The Base Property Definition window displays the current definition of the base property. This definition may include Extended properties. You can modify the following fields:

- The Property Disabled field indicates whether or not the property appears on the application window.
- The Required field indicates whether or not users must define a value for this property.
- The Data Type field indicates the format of the value that users can use to define the property.

5. If you want to modify Extended Properties, click the name of the Extended Property to open the Edit Extended Property window.
6. Click **Update** to confirm your changes. Or click **Restore** to bring back the original base properties.

See also

[Adding Extended Properties](#)

Adding Extended Properties

An extended property is an additional attribute of a basic property. Use the following procedure to add an extended property.

Prerequisites

A profile must have base properties defined.

Steps

1. Log in to the System Administrator Console as the application administrator for the application that subscribes to the profile for which you are adding extended properties.
2. Select the Advance tab and click **Extensibilities**.
3. Select the Profile Name and then select the Base Property Name.
4. On the Base Property Definition window, click **New**.

The Create Property window displays fields you can use to define the extended property.

- Use the Property Disabled field to indicate whether or not the property appears on the application window.
- Use the Required field to indicate whether or not users must define a value for this property.
- Use the Data Type field to indicate the format of the value that users can use to define the property.

5. Click **Create** to complete the extended property creation.

See [Creating Property Rules](#) to define conditions that make the base properties valid.

Creating Property Rules

A property rule is a condition that must exist for a property to be valid, or acted upon. Property rules are applied to both base properties and extended properties. Use this procedure to create a property rule.

Prerequisites

An extended property must exist for which you are creating a property rule.

Steps

1. Log in to the System Administrator Console as the application administrator for the application that subscribes to the profile for which you are adding extended properties.
2. Select the Advance tab and click **Extensibilities**.
3. Select the Profile Name and then select the Base Property Name.
4. Click **New** under the list of Extended Properties.

The Create Rule window displays fields you can use to define the Property Rule. You must enter information in the fields marked with an asterisk (*).

5. Click **Create** to complete the Rule creation.

See also

[Adding Extended Properties](#)

Changing Your Profile Preferences

When you initially register as a user, the system administrator may give you one or more responsibilities. Each responsibility gives you access to one or more CRM modules.

On the General Preferences window, if you have multiple responsibilities, you can switch to another one. The General Preferences window also provides fields for changing the display for language, currency, date, and tables.

Use the following procedure to manage your responsibilities and display options.

Steps

1. Log in to the System Administrator Console.
2. Click **Profile** in the right corner of the window, just above the menu bar.
The General Preferences window opens to display the Current and Default Responsibilities that have been assigned to you.
If this window is not displayed, click the Preferences link on the left side of the window.
3. Choose another responsibility from the Current Responsibility list.
4. Choose options from the other available fields as needed.
5. Click **Update** to enforce your changes. Or click **Restore** to return the values that initially displayed in the window.

Changing a Personal Profile

When you register as a user, you enter a user ID and a password that you use each time you log in to Oracle CRM modules. You can change your password and your user information on the Personal Profile window. Use the following procedure to change your personal profile.

Steps

1. Log into the System Administrator Console.
2. Click **Profile** in the right corner of the window, just above the menu bar.
The General Preferences window opens.
3. Click the Personal Profile link on the left side of the window.

The Personal Profile window opens.

4. Modify any of the fields on the window.
5. Click **Update** to enforce your changes. Or click **Restore** to return the values that initially displayed in the window.

Using the Profile Address Book

When you register as a user, you enter contact information for the organization you are representing. You can use the Address Book to modify this contact information when necessary. Use the following procedure to modify contact information.

Steps

1. Log into the System Administrator Console.
2. Click **Profile** in the right corner of the window, just above the menu bar.
3. Click the Address Book link on the left side of the window.

The Address Book window opens.

4. Modify any of the fields on the window.
5. Click **Update** to enforce your changes. Or click **Restore** to return the values that initially displayed in the window.

Using the Quick Find

The Quick Find feature provides a way for you to search for particular information. The kinds of information for which you can search changes, depending on the CRM module you are using.

The Quick Find feature consists of two fields.

1. Use the list in the first field to identify the category of information in which you are searching.
2. Use the second field to enter one or more words, letters, or symbols to define what you are searching for.
3. Click **Go** to initiate the search.

The Search Results window displays all matches to your query.

Guidelines

You can enter the plus sign (+) in front of a letter in your search definition to make the letter mandatory in the search result. Enter the minus sign (-) to exclude a letter from the search result. Quick Find does not support “wild cards.”

Setting User Responsibilities for an existing AOL User

For user accounts that have been created through Oracle ERP or Oracle Application Forms, certain profile options and responsibilities need to be set up before these users can login to the HTML Applications.

Prerequisites

The user account must exist.

Steps

1. Log in to the Oracle Applications as a sysadmin user, with System Administrator responsibility
2. In the Navigator window, choose **Security->User->Define**.
3. In the Users window, search on the user name of the user in which you are interested.
4. Assign to that user any of the HTML application-related responsibilities that you want the user to have.

For example, this could be the CRM HTML Administration responsibility for logging into the HTML Admin Console, or the System Administrator responsibility.

5. Save your work, and close the Users window.
6. Open the **Profile->System Profile Options** form
7. Click **User**, and type in the user name for the field value
8. Using wildcards, search for profile options **JTF_PROFILE_DEFAULT%**.
9. Set the **JTF_PROFILE_DEFAULT_RESPONSIBILITY** profile option at the User level to the responsibility ID that corresponds to the responsibility you assigned in the earlier steps.

(To determine the responsibility ID, go to the Responsibility screen, **Help -> Diagnostics -> Examine -> Responsibility ID Value**.)

This value determines the menu that is rendered when the user logs in.

10. Set the JTF_PROFILE_DEFAULT_APPLICATION profile option at the User level to the application ID that corresponds to the default responsibility.
11. Save your work, and quit out of the profile window.

Guidelines

The following table lists the profile options to be set.

Profile Options For a User

Profile Options	Comments
ICX_LANGUAGE	Sets the language (for example, American English).
JTF_PROFILE_DEFAULT_CURRENCY	Sets the currency code.
JTF_PROFILE_DEFAULT_NUM_ROWS	Sets the total number of rows that display (for example, 10).
JTF_PROFILE_DEFAULT_BLANK_ROWS	Sets the number of blank rows that display (for example, 10).
JTF_PROFILE_DEFAULT_APPLICATION	Sets the application ID (for example, 690).
JTF_PROFILE_DEFAULT_RESPONSIBILITY	Sets the responsibility ID (for example, 21841).
JTF_PROFILE_DEFAULT_CSS	Sets the default style sheet, set this to JTFUCSS.CSS.

Note: The DEFAULT_APPLICATION and DEFAULT_RESPONSIBILITY profile option values are the most important all those listed. These values determine the menu structure that is drawn upon user log in.

See also

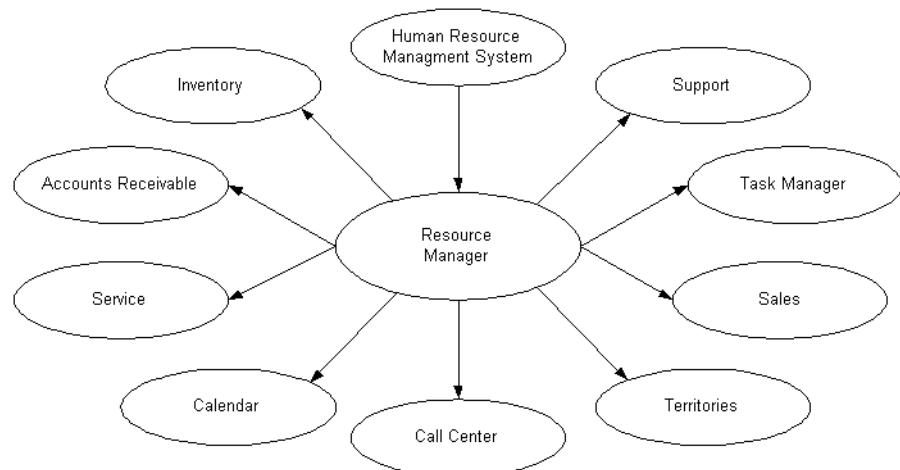
[System Profile Options](#)

Understanding Resource Manager

This topic group 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.

Resource Manager Overview

Define resources as the people, places, or things required by multiple application components in order to accomplish their objectives. The following diagram illustrates the application component relationship to Resource Manager.



You can use Resource Manager to import and view resources, define resources, define roles, create teams and groups, and organize resources within those teams and groups. Defining and organizing your resource information makes your resources available to the connected application modules for work action.

Using Resource Manager

This topic group provides process-oriented, task-based procedures for using the application to perform essential business tasks.

Creating and Defining Resources

Use the following steps:

- to create a resource of category Other,
- to define the Resource Team,
- and to define the group relationships

for newly created resources, or for already imported resources.

Prerequisites

None

Steps

1. In Resource Manager Navigator, double-click CRM Resources to expand the node.
2. Select Resources and click **Open**.
The Find Resources window opens.
3. In the Find Resources window, select from the list of values in the Category field.
4. Optionally, select from the list of values in the Transaction Number and Name fields.
5. Enter the required dates for the resource in the Start Date and End Date fields and click **Find**.

The Resource Search Results window opens.

6. Select the resource that best suits your needs and click **Resource Details**.

The Resource window opens.

7. Select from the list of values in the User Name field.
8. In the Roles tab, select from the list of values in the Role Type and Role Name fields.

The application populates the Start field with the current date.
9. Optionally, enter an end date to set an effective window for the role, or leave the End field blank to make the role effective indefinitely.
10. If you want to define multiple roles for the resource, then select the next row and repeat the process.
11. In the Groups tab, click to select a group name from the Name field listing.
12. Select from the list of values in the Role Name field.

The application populates the Start field with the current date.
13. Optionally, enter an end date to set an effective window for the role, or leave the End field blank to make the role effective indefinitely.
14. If you want to define multiple groups for the resource group member, then select the next row and repeat the process.
15. In the Teams tab, select a team name from the Name field listing.
16. Select from the list of values in the Role Name field.

The application populates the Start field with the current date.
17. Optionally, enter an end date to set an effective window for the role, or leave the End field blank to make the role effective indefinitely.
18. If you want to define multiple teams for the resource team member, then select the next row and repeat the process.
19. Save the resource.

A newly defined resource now exists and may be referenced through Resource Manager.

See Also

- [Defining Resource Teams](#)
- [Defining Resource Groups](#)

Importing Resources

You can import a resource into Resource Manager from different application databases depending on the resource type you choose. After selecting a resource based on its type, you identify its role and eligibility dates before saving it to Resource Manager. Use this procedure to import a resource.

Prerequisites

None

Steps

1. In Resource Manager Navigator, double-click CRM Resources to expand the node.
2. Select Import Resources and click **Open**.
The Selection Criterion window opens.
3. Select from the list of values in the Resource Category field.
4. Optionally, refine your resource search by selecting from the list of values in the available fields.
Different resource categories have different search field options.
5. Click **Search**.
The application populates the Category and Name fields in the Search Results section.
6. Choose a resource by deselecting the Select check boxes for the undesired resources and click **Create Resource**.
The Default Values window opens, and the application populates the Start Date field with the current date.
7. Optionally, select an end date, managing employee, role, and role effective dates.
8. Click **OK**.
The Selected Resources window opens displaying the resource selections.
9. If you want to save a resource to Resource Manager, then deselect the undesired resource check boxes and click **Save Resource**.
Resource importation and definition is complete.

10. If you want to further define the resource roles, groups, teams, or other details use this procedure.
 - a. **Click Details.**
The Resource window opens.
 - b. Define the resource information via the tab options.
 - c. Save the resource.

Guidelines

The Comments field in the Selected Resources window indicates whether the resource entry is a new record, duplicate record, or has a new role definition.

See Also

[Creating and Defining Resources](#)

Defining Resource Teams

Resource groups provide candidates for teams. But unlike groups, a team is composed of different resource types. Team members represent a resource group, and are chosen for their availability, qualifications, and location. You define a team to organize the necessary resources to accomplish an objective. Teams consist of people, places, and things that work together to efficiently complete a project. Use this procedure to define a team.

Prerequisites

None

Steps

1. In Resource Manager Navigator, double-click CRM Resources to expand the node.
2. Select Teams and click **Open**.
The Define Teams window opens.
3. Enter a team name in the Team Name field.
4. Enter a brief description of the team in the Team Description field.
5. Enter the effective dates for the team in the Start and End fields.

6. In the Members tab, select a member type, category, and member from the list of values in Type, Category, and Number fields.

The application populates the Name and Organization Name fields with the member's name and affiliated organization.

7. Optionally, select a member name and click **Member Details** to view specific member information.
8. In the Roles tab, select from the list of values in the Role Type and Role fields. The role's relationship to its type is indicated by the check box selection.
9. In the Usage tab, select from the list of values in the Usage field.
10. Optionally, define the members of the team and their roles in the Members tab.
11. Save the team definition.

The new team is accessible from the Team tab in the Resources window.

Guidelines

If you set (check) the new team's Exclusive flag, then you can only assign resources to this team who are NOT assigned to any other exclusive team that has the same usage in the same time frame.

See Also

[Creating and Defining Resources](#)

[Defining Resource Groups](#)

Defining Resource Groups

A resource group is a collection of resources. Resources fall into three categories: people, places, and things. Breaking these categories into groups helps you to distinguish the characteristics of its members. Choose to search for an existing group or create a new group; then define the group's members, roles, usages, and relations. Use this procedure to define a resource group.

Prerequisites

None

Steps

1. In Resource Manager Navigator, double-click CRM Resources to expand the node.

2. Select Groups and click **Open**.

The Define Groups window opens.

3. If you want to find an existing resource group, then use this procedure.

- a. On the application tool bar, click **Find**.

The Find Group window opens.

- b. Select a group name from the list of values in the Group Name field and click **Find**.

The application populates the Results section with the group name search results.

- c. Select a group name in the Results table and click **OK**.

The application populates the Define Groups window with the group information.

4. If you want to create a new group, then use this procedure.

- a. Enter a group name in the Group Name field.

- b. Enter a brief description of the group in the Group Description field.

- c. Enter the effective dates for the team in the Start and End fields.

5. In the Members tab, select a member category and member from the list of values in Category and Number fields.

The application populates the Name and Organization Name fields with the member's name and affiliated organization.

6. Optionally, select a member name and click one of the available buttons.

For a detailed description of the group member button options, see the Resource Group Member Buttons table in the References section.

7. In the Roles tab, select a role type and name from the list of values in the Role Type and Role fields.

The role's relationship to its type is indicated by the check box selection.

8. In the Usage tab, select a usage description from the list of values in the Usage field.

9. In the Relations tab, select a group number from the list of values in the Group Number field.

The application populates the Group Name field.

10. Select a relation type from the list of values in the Relation Type field.
11. Select effective dates for the relation from the list of values in the Start and End Date fields.
12. Save the group definition.

The new group is accessible from the Group tab in the Resources window.

See Also

[Creating and Defining Resources](#)

[Defining Resource Teams](#)

Resource Group Member Buttons

Button	Action
Member Details	Opens the main Resource window and record of the member.
Move Member	Opens the Move Member window, where you can assign the member to another group.
Member Roles	Opens the Member Roles window, where you can define the member role type, name, and effective dates.

Viewing Group Hierarchy

Use this window to view resources who report to a particular person. You can restrict your view by resource type, if desired. For example, you can view only those resources that report directly, or you can view all resources that report to a particular person.

Prerequisites

None

Steps

1. In Resource Manager Navigator, double-click CRM Resources to expand the node.

2. Select Group Hierarchy and click **Open**.

The Group Hierarchy window opens.

3. If you want to view the groups of a particular resource member, then select a member name or number from the list of values in the Name field and click **View**.

The application populates the Groups section with the member's groups and effective enrollment dates.

4. If you want to view the groups and members of a resource type, then select a resource type from the list of values in the Select field and click **View**.

The application populates the Groups and Members sections with the group and member names and effective enrollment dates.

5. If you want to view all the resource groups and members in the database, then select **ALL** from the list of values in the Select field and click **View**.

The application populates the Groups and Members sections with all the groups and their members and their effective enrollment dates.

Guidelines

Selecting **Reports Directly** from the list of values in the View By field searches the database for members that report directly to a resource group.

See Also

[Creating and Defining Resources](#)

[Defining Resource Teams](#)

[Defining Resource Groups](#)

[Importing Resources](#)

Using Notes

This topic group provides process-oriented, task-based procedures for using the application to perform essential business tasks.

Creating Notes

A note records descriptive information that has been generated by users about business transactions so that it may be referenced. You can use the Notes component from different applications in the product suite to access the comment log that relates to a specific transaction. Use this procedure to create a note.

Prerequisites

None

Steps

1. On the application menu bar, click Tools and select Notes.
The Notes window opens.
2. On the Notes toolbar, click **New**.
The application populates the source, owner, and date fields.
3. Enter the note information in the Notes field.
4. Optionally, click **More** to enter a note in the Detailed Notes window.
The Detailed Notes window holds textual notes up to 32 K in size.
5. Select note type and status from the list of values for each field.
6. Select from the list of values in the Related To field.

7. Enter a value in the Value field.

Define the information you enter in the Related To and Value fields according to the relationship between the note and business transaction. Use the Related To field to identify the source type for the note information and the Value field to specify the source name or number.

8. Save your note.

Note creation is complete.

Guidelines

View the note log in spread table format via the Notes tab and text format via the Summary tab. Clicking **Latest First** in the Summary tab organizes the note history so that the most recent note appears at the top of the summary.

See Also

[Finding Notes](#)

Finding Notes

Find notes by performing a search for source number, owner, date, or note type. Use this procedure to find an existing note.

Prerequisites

None

Steps

1. On the application menu bar, click Tools and select Notes.

The Notes window opens.

2. On the application toolbar, click **Find**.

The Find Notes window opens.

3. Select source and number from the list of values for each field and click **Search**.

The application populates the main note window with the note information.

4. Optionally, search for notes by owner, date, or note type.

Use this procedure to search for notes without a source value.

- a. Enter owner, date, or note type and click **Search**.

The application populates the Notes tab in the Notes window with the possible matches.

- b. Click to select your note and scroll right for additional information.

The note search process is complete.

Guidelines

Further refine your note search by entering Related To information in the Find Notes window. Selecting a match option also helps you focus your search.

See Also

[Creating Notes](#)

Understanding Calendar

This topic group provides overviews of the Calendar application and its components, as well as explanations of key concepts, features, and functions.

Overview

Calendar is a scheduling tool used to define and view available and non-available time for a resource or group of resources. You can create a calendar for yourself or another resource, associate work shifts with calendars, and assign a resource to a shift depending on availability. There are two types of Calendar screens: Calendar Setup and Calendar Datebook.

Calendar Setup

Use the Calendar Setup screens to set up shifts, define available and non available time for a resource, and define a calendar for a resource.

Calendar Datebook

Use the Calendar Datebook to view time availability for yourself, a resource, or a group of resources. You can also create a private Todo List or access the Tasks screen to edit a task for a resource. If you want to change availability times or a work shift, you must use the Calendar Setup screens.

Calendar Setup

Use Calendar Setup to create time periods in a calendar datebook for yourself or a resource. Calendar Setup uses shifts and patterns to define time availability and accommodate the most complex situation for a resource. You can set up everything you need to create pertinent information in your datebook.

What is Available Time?

Available time is defined using shifts and patterns.

What is a Shift?

A shift defines when a person is available to work. Using the simplest example, a shift can be created that defines the default working week Monday to Friday 8:30 to 17:00.

What is a Shift Pattern?

A set of shifts can be set into a pattern.

For example:

Shift A, named Field Support, starts at 8:00 and lasts 9 hours.

Shift B, named Stand By, starts at 20:00 and lasts 12 hours.

On days 1 to 4, the resource can be assigned shift A, and then days 6 and 7 shift B, and day 5 can be free.

What Is Non-available Time?

Non-available time is a defined block of time when a resource is not available to accept a task.

Non available time can be a number of entries:

- A personal entry
- An entry or task sent by another resource.
- A group appointment or entry created by the resource or another resource.
- Public holidays
- Meetings
- Personal vacation
- Illness
- Personal or work appointment.

Calendar Datebook

In your Datebook you can view:

- Working hours
- Assigned tasks
- Personal appointments
- Official holidays and vacation days.

In addition, you can:

- Create a To Do list for the day, week, or month.
- Access the Tasks application to edit a task.

Using Calendar

This topic group provides process-oriented, task based procedures for using the Calendar Setup screens and the Calendar Datebook.

Defining Availability

Defining availability means defining your working hours. A shift is the time a resource is available, and a shift pattern is the shift that extends for a longer period of time. Use this procedure to define shifts and shift patterns. For more information see [Calendar Setup](#).

Prerequisites

None.

Steps

1. Navigate to the Define Shifts screen.
2. In the Name field, create a name for your shift. You will be attaching this specific shift to your calendar later.
3. In the Description field, enter a description of the shift.
4. In the Effective Dates area, enter the start and end dates.
5. In the Shift Pattern area, define recurrent days off, such as Saturday and Sunday.
The time on the days off should range from 00:00 - 00:00.
6. In the Shift Pattern area, select the day of the week from the list of values.
7. Enter the times you are available for the selected work day.
8. In the Availability Type field, select the availability type from the list of values. You can manually enter a type if the list doesn't provide you with an appropriate type.
9. In the Effective Dates area, enter the start date.
The field is automatically populated with today's date.

10. In the To field, select the list of values to view a calendar.
11. Save your work. Your shift pattern is saved to the database.

Defining Non-Availability (Exceptions)

When you are setting up your calendar you must define not only your working hours, but also the times when you are not available for work, such as federal holidays, vacation, or sick days. These days are exceptions to your regular working shift. Use this procedure to define non-availability.

Prerequisites

None

Steps

1. Navigate to the Exceptions screen.
2. In the Name field, create a name for your non-available work time.
3. In the Category field, select a category from the list of values. A category is a predefined type of exception.
4. In the Description field, enter a description of your exception.
5. Click **Save**. Your exception information is saved to the database.

Defining the Calendar

In order for your shifts and times to appear in the Datebook, you must create a calendar. Once your calendar is defined, then you can link your shifts and times to it. Use the procedure to define a calendar.

Prerequisites

None

Steps

1. Navigate to the Define Calendar screen.
2. In the Name field, select the calendar name from the list of values.
3. In the Type field, select the type of calendar you want to create from the list of values.

4. In the Description field, enter a description of the calendar type.
5. In the Effective Dates fields, enter the time period for the calendar.

Using the Assign Shift/Exceptions Window

You can use the Assign Shift/Exceptions window to:

- [Assign a Calendar to a Shift](#)
- [Assign a Calendar to an Exception](#)

Assigning a Calendar to a Shift

Use this procedure to assign shift patterns that have already been defined to a specific calendar. The shifts and patterns are then displayed in your datebook.

Prerequisites

You must first define your availability and non-availability (shift patterns).

Steps

1. Navigate to Assign Shift/Exceptions.
2. Select the Shifts tab.
3. In the Calendar Name field, enter a calendar name.
4. Enter the calendar description.
5. Enter the effective dates.
6. In the Shifts field, select your already defined shift from the list of values.

See also

[Defining Non-availability \(Exceptions\)](#)

[Defining Availability](#)

Assigning a Calendar to an Exception

Use this procedure to assign exceptions that have already been defined to a specific calendar. These exceptions are then displayed in your datebook.

Prerequisites

You must first define your availability and non-availability (shift patterns).

Steps

1. Navigate to Assign Shift/Exceptions.
2. Select the Exceptions tab.
3. In the Calendar Name field, select a calendar name from the list of values.
4. Enter the calendar description.
5. Enter the effective dates.
6. In the Shifts field, select your already defined shift from the list of values.

See also

[Defining Non-availability \(Exceptions\)](#)

[Defining Availability](#)

Assigning a Resource to a Calendar

In addition to creating your own personal calendar, you can assign a resource to a calendar. Use this procedure to assign a resource to a calendar.

Prerequisites

None

Steps

1. In the Calendar Name field, select the calendar name from the list of values.
2. From the Resource Type drop-down list, enter the resource type.
3. In the Name field, enter the name of the resource.
4. Enter the start and end dates.
5. Click **Save**.

Guidelines

You can assign more than one calendar per resource.

Creating Tasks and ToDos in a Calendar

Use the following procedure to gain access to your personal calendar and there create and edit tasks and ToDos.

Prerequisites

You must have a personal calendar.

Steps

1. Navigate to **Control Tower**.

The Control Tower form opens with resources displayed on the Plan Board tab at the bottom of the form.

2. Right-click a resource name to open a pop-up menu.

3. Select Show Calendar to open the calendar for the selected resource name.

The Calendar opens to display tasks and ToDos.

- To create a task, select Task and click **New**. The Tasks form opens. See [Creating and Updating Tasks](#) for details.
- To create or edit a ToDo, select ToDo and click **New**. The Create/Edit Todo form opens. Fill in the appropriate information and click **OK**. See [Creating a ToDo List](#) for details.

4. Save your changes and close the Calendar.

Viewing the Datebook

Use the Datebook screen to view a work shift, task, or time off for yourself or a resource, or a group of resources.

Prerequisites

None

Steps

1. Navigate to the Datebook screen.

2. From the Calendar Name field, select the calendar name you want to view. For example, a personal or work calendar.
3. From the drop-down list next to the Resource Employee field, select the resource or group of resources available for the chosen calendar.
4. Select either the Day, Week, or Month tab depending on the time period you want to view.

Creating a ToDo List

You can create a personal ToDo list for yourself. Use this procedure to create a ToDo list.

Prerequisites

None

Steps

1. Navigate to the Datebook screen.
2. Select the ToDo radio button.
3. Click New. The Create/Edit ToDo screen appears.
4. Enter the name of your ToDo. This entry appears in the ToDo region.
5. Enter a description of the ToDo. Use this text field to add more detail to your one line ToDo name.
6. In the Priority field, enter the priority.
7. In the Status field, enter the status.
8. Enter the effective dates.
9. Click OK.

Understanding Territory Management

This topic group 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.

Territory Management Overview

You can use Territory Management to automatically assign sales, service, and collection teams based on their availability and expertise. You can also use it to make sales, service and collections information more secure by restricting personnel access to customer data.

Most sales and service territories are one dimensional. They assign tasks to employees based on postal code, area code, country, vertical market, size of company, or product expertise. Territory Management makes it possible for you to create multidimensional territories using a number of such criteria.

For example, you can assign all large customers within a specific geographical area only to those sales representatives who have an expert knowledge of a product and have been with the company for more than one year.

Territory Management lets you create multiple such territories for individuals or for whole teams of sales, service, and collections representatives.

You can think of Territory Management as a high-level programming tool that determines the assignment of tasks and resources within your company.

After you define territories using Territory Management, you must run the Generate Territory Package concurrent program. This compiles the territories you create into the logic, called the territory package, that is used by your application for the territory assignment itself.

After the concurrent program runs successfully, the Territory Management module together with Oracle Calendar and Oracle Human Resources automatically assign the most qualified individual to a task.

See Also

[Setting Up Territories for Your Organization](#)

[Basic Territory Building Blocks](#)

[Different Ways of Creating Territories](#)

Basic Territory Building Blocks

Here are the basic building blocks you use to define territories:

- [Qualifiers](#)
- [Territory types](#)
- [Territory templates](#)
- [Territories](#)
- [Escalation territories](#)

Qualifiers

Qualifiers are the criteria used to delineate a territory. There are two types of qualifiers: transaction qualifiers and resource qualifiers.

Use transaction qualifiers to specify how the territory module assigns transactions. This includes accounts, leads, opportunities, and service requests. Examples of transaction qualifiers include: customer name, postal code, state, and product interest.

Resource qualifiers specify what attributes are used to select the individuals responsible for those transactions. Examples include job title, competence, and language.

Territory Management provides a large number of preset qualifiers of both types (see [List of Predefined Territory Qualifiers](#) for a list). Your implementation team can also define qualifiers tailored to your company. See [Creating Custom Qualifiers](#) for details.

Territory Types

Use territory types to group transaction qualifiers used for creating territories. This saves you time when you are creating similar territories. Suppose you want to create territories by geographical area. In this case you can create a territory type with the Country and Postal Code qualifiers.

Territory Templates

Use a territory template to create many similar territories at the same time. Suppose you have two large customers and you wish to create a territory for each of them for every state in the United States. Creating individual territories requires you to repeat the same procedure 100 times, once for each of the 50 states for each company. Using a territory template, you can create all of the 100 territories at the same time.

Territories

A territory consists of qualifiers and their values. You can create a territory individually or you can create a large number of territories all at the same time using a Territory template. (See [Different Ways of Creating Territories](#) for more details.)

Escalation Territories

You can create alternate territories to automatically reassign a sales lead or service call when certain conditions are not met. For example, if a repair team assigned a repair does not take action within five business days, then that repair can be assigned automatically to another group.

Different Ways of Creating Territories

You can create a territory in one of three ways:

- [Create an individual territory](#).

You can create a standalone territory, entering territory qualifiers and their values directly. This method does not leverage your work because you have to add both qualifiers and their values for each territory you create. Do not use this method often.

- [Create a territory using a territory type](#).

Creating territories using a territory type is a two step process:

1. [Create the territory types](#) by adding the transaction qualifiers you are going to use.
2. Use the territory types to [create individual territories](#).

Use this method for creating multiple territories with similar characteristics. Using territory types to create territories saves you time because you do not have to add qualifiers to each individual territory, but you still have to create each individual territory separately by entering values for the qualifiers.

Territory types limit you to using transaction qualifiers, so if you plan to use resource qualifiers, then you must use territory templates instead.

- [Create a large number of territories all at the same time using a territory template](#).

Suppose you wish to create a separate territory for every state in the United States for two large customers. Creating individual territories requires you to repeat the procedure 100 times, once for each of the 50 states for each company. Using territory types, you still must create each 100 territories separately although the process is somewhat shorter. By following the procedure outlined in [Using a Template to Create Large Numbers of Territories](#), you can create all of the 100 territories at the same time.

List of Predefined Territory Qualifiers

The Territory Management application includes pre-defined qualifiers for different types of applications:

- Oracle Defect Management
- Oracle Sales and Marketing
- Oracle Service
- Trade Management

Predefined Territory Qualifiers

Application Type	Qualifier Type	Qualifier Name
Defect Management	Defect Transactions	Company Name
Defect Management	Defect Transactions	Country
Defect Management	Defect Transactions	Account Code
Defect Management	Defect Transactions	Postal Code

Predefined Territory Qualifiers

Application Type	Qualifier Type	Qualifier Name
Defect Management	Defect Transactions	Area Code
Defect Management	Defect Transactions	Customer Name Range
Defect Management	Defect Transactions	Number of Employees
Defect Management	Defect Transactions	Province
Defect Management	Defect Transactions	County
Defect Management	Defect Transactions	Sub Component
Defect Management	Defect Transactions	Error Code
Defect Management	Defect Transactions	Platform Specific Flag
Defect Management	Defect Transactions	Func Defect Flag
Defect Management	Defect Transactions	UI Defect Flag
Defect Management	Defect Transactions	Tier Code
Defect Management	Defect Transactions	Priority
Defect Management	Defect Transactions	Severity
Defect Management	Defect Transactions	Component
Defect Management	Defect Transactions	Phase
Defect Management	Defect Transactions	Problem Type
Defect Management	Defect Transactions	Platform
Defect Management	Defect Transactions	Product
Defect Management	Defect Transactions	State
Defect Management	Defect Transactions	City
Defect Management	Resource	Job Title
Defect Management	Resource	Competence
Defect Management	Resource	Postal Code
Defect Management	Resource	Resource Category
Defect Management	Resource	Resource Type
Defect Management	Resource	City
Defect Management	Resource	Language

Predefined Territory Qualifiers

Application Type	Qualifier Type	Qualifier Name
Defect Management	Resource	Position
Sales	Account	Company Name
Sales	Account	Contact Interest
Sales	Account	Account Hierarchy
Sales	Account	SIC Code
Sales	Account	Business Line
Sales	Account	Number of Employees
Sales	Account	Sales Partner/Reseller
Sales	Account	Province
Sales	Account	Customer Name Range
Sales	Account	County
Sales	Account	Area Code
Sales	Account	Lead Quantity
Sales	Account	Lead Rank Code
Sales	Account	State
Sales	Account	Postal Code
Sales	Account	City
Sales	Account	Account Code
Sales	Account	Account Classification
Sales	Account	Country
Sales	Lead	Lead Expected Purchase
Sales	Lead	Lead Promotion Identifier
Sales	Lead	Purchase Amount
Sales	Lead	Budget Amount
Sales	Lead	Lead Inventory Item
Sales	Opportunity	Opp Expected Purchase
Sales	Opportunity	Opportunity Classification

Predefined Territory Qualifiers

Application Type	Qualifier Type	Qualifier Name
Sales	Opportunity	Opportunity Channel
Sales	Opportunity	Opp Inventory item
Sales	Opportunity	Market Segment
Sales	Opportunity	Total Amount
Sales	Resource	Job Title
Sales	Resource	Competence
Sales	Resource	Postal Code
Sales	Resource	Resource Category
Sales	Resource	Resource Type
Sales	Resource	City
Sales	Resource	Position
Sales	Resource	Language
Service	Account	Company Name
Service	Account	Number of Employees
Service	Account	Province
Service	Account	Customer Name Range
Service	Account	County
Service	Account	Area Code
Service	Account	State
Service	Account	Postal Code
Service	Account	City
Service	Account	Account Code
Service	Account	Country
Service	Resource	Job Title
Service	Resource	Position
Service	Resource	Language
Service	Resource	Competence

Predefined Territory Qualifiers

Application Type	Qualifier Type	Qualifier Name
Service	Resource	City
Service	Resource	Postal Code
Service	Resource	Resource Category
Service	Resource	Resource Type
Service	Service Request	Request Type
Service	Service Request	Request Problem Code
Service	Service Request	Request Urgency
Service	Service Request	Request Status
Service	Service Request	Support Site
Service	Service Request	Request Creation Channel
Service	Service Request	Inventory Item
Service	Service Request	Customer Site
Service	Service Request	Platform
Service	Service Request	Request Severity
Service	Task	Task Type
Service	Task	Task Status
Service	Task	Task Priority
Trade Management Market	Resource	Job Title
Trade Management Market	Resource	Position
Trade Management Market	Resource	Language
Trade Management Market	Resource	City
Trade Management Market	Resource	Resource Category
Trade Management Market	Resource	Resource Type
Trade Management Market	Resource	Postal Code
Trade Management Market	Resource	Competence
Trade Management Market	Trade Account	Company Name
Trade Management Market	Trade Account	County

Predefined Territory Qualifiers

Application Type	Qualifier Type	Qualifier Name
Trade Management Market	Trade Account	Party Relation
Trade Management Market	Trade Account	Customer Profile
Trade Management Market	Trade Account	Site Classification
Trade Management Market	Trade Account	Business Purpose
Trade Management Market	Trade Account	Account Hierarchy
Trade Management Market	Trade Account	Province
Trade Management Market	Trade Account	Location
Trade Management Market	Trade Account	Country
Trade Management Market	Trade Account	State
Trade Management Market	Trade Account	Postal Code
Trade Management Market	Trade Account	City
Trade Management Market	Trade class qualifiers	Company Name
Trade Management Market	Trade class qualifiers	Customer Category
Trade Management Market	Trade class qualifiers	Customer Sub Category
Trade Management Market	Trade class qualifiers	Customer Class
Trade Management Market	Trade class qualifiers	Account Classification
Trade Management Market	Trade class qualifiers	Sales Channel
Trade Management Market	Trade class qualifiers	Account Code

Territory Planning

Before using the Territory Management module, you must analyze the territory setup in your organization. You need enterprise-wide cooperation and feedback and you must expect to make multiple territory revisions in the first months of operation as your enterprise discovers omitted information or territories that do not work on a day-to-day basis.

Here are the general steps to follow in the planning process:

1. Review your existing territories.

You need the following types of information:

- How your territories are currently assigned (by state, by industry, by zip code, by account, and so on)
- The names and current territory assignments for your sales or service personnel
- The names of employees in other organizations who receive account, lead, and opportunity information and how that information is accessed and used
- Your products and how they are differentiated

2. Decide what qualifiers you want to use to assign accounts or opportunities to territories and create territory types to restrict your territory restrictions.
3. Decide on the hierarchy of territories.
4. Decide if you need escalation territories and how they fit in the hierarchy.
5. Decide what qualifier values you wish to use for assigning territories.
6. Identify any overlapping territories and decide the order in which the application picks them.

Rank any overlapping territories from 1 to n to determine the order. A territory with a smaller rank wins over a territory with a higher rank. In case of a tie, the assignment is made randomly.

For example, if a customer can be assigned to two overlapping territories which are ranked 1 and 2 respectively, the territory with a rank of 1 wins over a territory with a rank of 2.

7. Test your strategy before implementing territories throughout the company.

Remember that your first territory setup is not necessarily the one that works best. You can achieve optimum territory definition only gradually after much fine-tuning to accommodate user reactions and various interests in your organization.

Tips for Fine-tuning Territory Assignment Performance

Ranking Strategy

You can speed up processing time by ranking more frequently used territories higher than less frequently used territories.

For example, if you have two sales organizations, one in Canada and one in the United States, and you know that some 80 percent of your customers are coming

from the United States, then rank the US territory higher than the Canada territory. The application saves processing time as a result because it looks for a US territory before it looks for a Canadian territory.

You must use caution that your modifications do not result in erroneous assignments, however.

Suppose you have two overlapping territories:

- Territory A

Qualifier: Company Name Range= F%

Note: The % symbol is a wild card.

- Territory B

Qualifier: Company Name Range=Ford Motor Co%

If you rank territory A higher than territory B, then territory B never receives any assignments. All Ford accounts are assigned to territory A.

Using Territory Management

This topic group provides process-oriented, task-based procedures for using the application to perform essential business tasks.

Setting Up Territories for Your Organization

Implementing Territory Management involves four required and one optional step:

1. [Planning](#)
2. [Creating custom qualifiers](#) (Optional step)
3. [Selecting qualifiers](#)
4. [Creating territories](#)
5. Running the Generate Territory Package concurrent program

Selecting Qualifiers

You must select the qualifiers you are going to be using by checking the Enabled flag before you can create your territory types, territory templates, and territories.

If you need to set up qualifiers of your own, then follow the procedure outlined in [Creating Custom Qualifiers](#).

Prerequisites

[A plan for territory setup.](#)

Steps

1. From the Admin menu, choose **Setup Qualifiers**.
The Setup Qualifiers window appears.
2. From the View menu, choose **View Query by Example > Enter**.
3. In the Usage field, enter %<a descriptive word for your application group>%.

For example, for sales applications, enter `%sales%`. For service applications, enter `%service%`.

4. From the View menu, choose **View Query by Example > Run**.
5. From the list of valid qualifiers for your application family, select those you wish to use by checking the **Enabled Flag** check box.
6. Click **OK** when you are done.

Using the Navigator

Use the Navigator to view your territory structure and to locate those territories, territory types, and territory templates you wish to modify.

You can use the Navigator to:

- [View the structure of your territories in a tree format and create new territories.](#)
- [View and modify your territory types and the territories created using them.](#)
- [View and modify the escalation territories you have created.](#)
- [View and modify your territory templates and the territories created using them.](#)
- [Search for the territory you wish to view or modify.](#)

You can view and modify any item in the tree by double-clicking on it. This launches the [Territory Details](#) window.

Viewing Territory Structure as a Tree

Use this procedure to display your territories in a tree format.

You can insert a territory below any territory in the tree. See [Creating Individual Territories](#) for details.

Prerequisites

The Navigator must be the active window.

Steps

1. From the View By drop-down list, select **Territories**.

2. If you wish to view territories effective on a specific date, then enter that date in the Date field. Unless you enter a different date, the territories are effective today.
3. Click the nodes of the tree containing a plus sign to open them.
4. To view or modify a particular territory, double-click it. The application launches the Territory Details window.

Viewing Territory Types

Use this procedure to display your territory types.

Prerequisites

The Navigator must be the active window.

Steps

1. From the View By drop-down list, select **Territory Types**.
2. If you wish to view territory type effective on a specific date, then enter that date in the Date field. The default is today.

The Navigator displays the territory types you have created.
If you have used a territory type to create territories, then those territories appear in a tree under that territory type.
3. Click on any nodes containing a plus sign to open them.
4. To view or modify a specific territory type, double-click it. The application launches the Territory Details window.

Viewing Escalation Territories

Use this procedure to display your escalation territories you have created.

Prerequisites

The Navigator must be the active window.

Steps

1. From the View By drop-down list, select **Escalation Territories**.

2. If you wish to view escalation territories effective on a specific date, then enter that date in the Date field. The default is today.
3. To view or modify a particular territory, double-click it. The application launches the Territory Details window.

Viewing Territory Templates

Use this procedure to display your territory templates.

Prerequisites

The Navigator must be the active window.

Steps

1. From the View By drop-down list, select **Territory Templates**.
2. If you wish to view territory templates effective on a specific date, then enter that date in the Date field. The default is today.

The Navigator displays the territory template you have created.

If you have used the territory template to create territories, then those territories appear in a tree under that territory template.

3. To view or modify a particular territory template, double-click it. The application launches the Territory Details window.

Searching the Navigator

Use this procedure for finding territories, territory types, escalation territories, and territory templates in the Navigator.

Prerequisites

None.

Steps

1. Select the Navigator as your active window.
2. From the Administration menu, choose **Search**.

The Territory Search window appears.

3. From the Search For drop-down list, select the information type you are searching for: territory, territory type, escalations, or territory template.
4. In the Basic tab, enter the information you are searching for.
5. If you wish to search for specific qualifier values, then enter these in the Advanced tab.
6. **Click Search.**

The results of your search appear in the Search Results field below.

7. If you wish to view any of the found items, then:
 - a. Select the item from the list.
 - b. **Click Populate Tree.**

The Navigator opens to the selection you selected.

Using the Territory Details Window

Use the Territory Details window to:

- [Create territories](#)
- [Create escalation territories](#)
- [Create territory templates](#)

Creating Territory Types

Use this procedure to create territory types. A territory type is a grouping of transaction qualifiers you can use to simplify and systematize the territory creation process.

Prerequisites

- You must [plan your territories](#) before using this procedure.
- You must [set up your qualifiers](#).

Steps

1. From the Administration menu, choose **Create Territory Type**.

The Create Territory Type window appears.

2. From the View By drop-down list in the Navigator, select **By Territory Type.**

The Navigator displays the territory types you have created as nodes on the tree. Each territory you create appears under the territory type that created it.

3. If you believe a similar territory type already exists, then you can save yourself some work by copying it. Here is how:

a. [Search for a similar territory type](#).

b. If you find a similar territory type, then click **Copy Type.** The application creates a copy of the existing territory type that you can modify.

4. In the Usage field, use the List of Values (LOV) to select the type of application using this territory type.

5. Enter a name for the territory type and a description.

6. If you wish to limit the use of this territory by date, then enter a date range.

7. Use the LOV to select one or more types of transactions with the application type. Available values include account, lead, opportunity, and service request.

8. In the Qualifiers region, use the LOV to enter the qualifiers you wish to use for the territories you create.

9. If you wish to allow overlap for a qualifier, then click the **Allow Overlap? check box.**

Allowing overlap allows you to assign overlapping territory values to the same qualifier. For example, suppose you wish to create a territory for John Smith where the qualifier *Postal Code* has the values 94400 - 94410 and 94408 - 94420. By enabling overlap, you can enter both ranges as values for the qualifier. With no overlap, Territory Management prevents you from entering the second range of values for the qualifier.

10. Click **OK to save your work and exit.**

Creating Individual Territories

Use this procedure to create individual territories with or without using territory types. To create large numbers of territories at the same time see [Using a Template to Create Large Numbers of Territories](#).

Prerequisites

- If you want to use territory types to create territories, then you must [create the territory types](#) first.
- You must draw up [a plan for your territories](#).

Steps

1. In the Navigator, select the territory that serves as a parent to the new territory. If this is the first territory you are creating, then select Catch All.
2. Right-click with the mouse and select **New** from the pop-up menu.
The Territory Details window appears.
3. In the Overview tab, use the List of Values (LOV) in the Usage field to select the type of application you want to use this territory. Your selection limits the types of qualifiers you can use in the territory definition.
4. In the Category region, select the **Standard** radio button.
5. Enter a name and description for the territory.
6. If you want to limit the time the territory is effective, then enter the start and end dates. By default the territory become effective on the date you create it.
7. Make sure the parent territory is the territory you selected in the Navigator. If this is not the parent territory, then use the List of Values (LOV) to select the appropriate parent territory.
8. If you have created an escalation territory for this territory, then enter it using the LOV in the Escalation field.
9. Use the Transaction Types LOV to select one or more types of transactions with the application type. Available values include account, lead, opportunity, and service request. Note that some application types allow you only one transaction type.
10. If you wish to use an existing territory type to create this territory, then use the LOV to enter it in the Type field. If you use a territory type, then you are restricted to using the qualifiers set up in that territory type.
11. Select the Transaction Qualifiers tab.
12. If this territory is part of a hierarchy of territories, then click **Show Inherited Qualifiers** to examine which qualifiers this territory has inherited from its parent territory(ies). You do not want to use any of these qualifiers in the territory you create to avoid duplication.

13. If you are creating a new territory without a territory type, then enter the qualifiers you are going to use in the Transaction Qualifiers region.
14. If you have used a territory type to create this territory then the qualifiers are already prefilled.
15. If you wish to enter overlapping values for a qualifier, then check the **Overlap Allowed** check box.
16. Enter the values for each qualifier. See [Entering Qualifier Values](#).
17. Select the resources for the territory using the procedure outlined in [Selecting the Resources for a Territory](#).
18. If your territory hierarchy includes territories below the current territory, then:
 - a. Select the Sub-Territories tab.
The tab lists all the sub-territories for the current territory. Since you have not created any sub-territories, this list is blank.
 - b. Click **New Sub-Territory** and repeat the [territory creation procedure](#) for the new sub-territory.
19. Click **Save** on the toolbar to save your work.

Selecting the Resources for a Territory

Use this procedure to select the resources you want to staff a territory.

Prerequisites

The Territory Details window is active with the territory you wish to staff displayed.

Steps

1. Select the Resource Qualifiers tab.
2. In the Name fields of the Resource Qualifier region, use the list of values (LOV) to enter the qualifiers related to the skill set of the employees assigned to this territory.
3. Enter the values for each qualifier. See [Entering Qualifier Values](#).
4. Select the Resources tab.

5. If you know the resources you wish to assign to this territory or you have a small pool of people to work with, then use the List of Values (LOV) to enter them in the Name fields provided.
6. If you do not know the people you want assigned to this territory and have a large pool of potential names, then:
 - a. **Click Auto Assign Resources.**
The Qualifying Resources window displays a list of people that fit the resource qualifiers values you have entered.
 - b. If no people or the wrong people are found, then you must go back to the Resource Qualifiers tab and enter a different set of resource qualifier values, or you can select resources manually in the Resources tab.
 - c. Select the people you wish to assign to this territory by checking the assign check box next to their name.
 - d. **Click OK** when you are done.
7. Next to the name of the person you wish to become the primary contact for the territory, check the **Primary Contact** check box.
8. For each resource you can add a start and end date if you wish to limit their participation.
9. For each resource, enter the transactions you wish them to access. For example, you wish some resources to access account and contact information, but not lead information. To enter access for an individual:
 - a. Select the resource in the Resources region.
 - b. Select the access type in the Access region below.
10. Click **Save** on the toolbar.

Creating Escalation Territories

Use this procedure to create escalation territories. Escalation territories are alternate territories where transactions such as a sales lead or service call is automatically reassigned when certain conditions are not met, when a service call does not get answered for five days, for example. Escalation territories define the teams that will handle the escalations and so are limited to using resource qualifiers.

Prerequisites

A plan for your territories.

Steps

1. Make the Navigator the active window.
2. From the Administration menu, select **Escalation Territories**.
The Territory Details window appears.
3. In the Overview tab, use the List of Values (LOV) in the Usage field to select the type of application you want to use this territory. Your selection limits the types of qualifiers you can use in the territory definition.
4. In the Category region, select the **Escalation** radio button.
5. Enter a name and description for the territory.
6. If you want to limit the time the territory is effective, then enter the start and end dates. By default the territory become effective on the date you create it.
7. Select the resource qualifier for the escalation territory using the procedure outlined in [Selecting the Resources for a Territory](#).
8. Click **Save** on the toolbar to save your work.

Entering Qualifier Values

Use this procedure to enter qualifier values while creating individual territories. You cannot use this procedure for entering qualifier values in territory templates.

Prerequisites

You must have the Transaction Qualifiers or Resource Qualifiers tab selected.

Steps

1. Select the qualifier in the Qualifiers region.
2. The possible value types display below. For example, if you are entering values for the Interest Type qualifier used in sales applications, then you can enter three values: the interest type, the primary interest, and the secondary interest.

3. Use the List of Values to select an operator.

Note: The list of operators varies depending on the type of qualifier you use. Some qualifiers allow only the = symbol, for example.

4. Enter the value(s) in the fields provided. Some operators allow you to enter a range of values; others only a single value.

Note: The field names change depending on the qualifier.

Using a Template to Create Large Numbers of Territories

Use this procedure to create a territory template that automates the process of creating a large number of territories. You can only create territories that use the same qualifiers with different values. For example, you use this procedure to create a separate territory for each state in the United States for your major customers. See [Example of Creating Geographical Territories](#) for a more detailed example.

After you create territories using this procedure, you must open up each individual territory and select the resources you wish assigned to each territory.

Prerequisites

- If you want to use territory types to create territories, then you must [create the territory types](#) first.
- [A plan for your territories](#).

Steps

1. In the Navigator, select the territory that serves as a parent to the new territory. If this is the first territory you are creating, then select Catch All.
2. Right-click with the mouse and select **New** from the pop-up menu.
The Territory Details window appears. If you selected an existing territory as the parent, then the Usage and Parent fields are pre-filled.
3. In the Category region, select the **Template** radio button.

4. If Catchall is the parent territory, then use the List of Values (LOV) in the Usage field to select the type of application you want to use this territory. Your selection limits the types of qualifiers you can use in the territory definition.
5. In Transaction Types fields, use the LOV to enter one or more transactions. The transaction is what the Territory Module distributes to the territories you are creating. You can create territories for a variety of transactions. These include account, lead, opportunity, and service request. Note that CRM applications restrict the types of transactions you can use for territory creation. You cannot create a territory for leads for a service application, for instance.
6. If you wish to use an existing territory type to create this territory template, then use the LOV to enter it in the Type field. If you use a territory type, then you are restricted to using the qualifiers set up in the territory type.
7. Select the Transaction Qualifiers tab.
8. Use the LOV to enter the qualifiers in Qualifier Type.

Note: If you are using a territory type to create the territory template, then some of the Qualifier types are already prefilled on this tab.

9. From the Qualifier Mode drop-down list for each qualifier, select either **Static** or **Dynamic**.
10. Enter values for each transaction qualifier:
 - a. Select the qualifier in the Transaction Qualifiers region.
 - b. If the qualifier you have selected is a static qualifier, then enter the value(s) below. See [Entering Static Qualifier Values for Templates](#) for details.
 - c. If the qualifier is a dynamic qualifier, then enter the value(s) or value set(s), clicking **Next Value Set** between each entry or set of entries. See [Entering Dynamic Qualifier Values for Templates](#) for details.
11. If you do not wish to add resource qualifiers for this template, then skip to step 16.
12. If you wish to add resource qualifiers, then select the Resource Qualifiers tab.
13. Use the LOV to enter the qualifiers in the Name fields in the top portion of the tab.

14. From the Mode drop-down list for each qualifier, select either **Static** or **Dynamic**.
15. Enter values for each resource qualifier:
 - a. Select the qualifier.
 - b. If the qualifier you selected is a static qualifier, then enter the value(s) below. See [Entering Static Qualifier Values for Templates](#) for details.
 - c. If the qualifier is a dynamic qualifier, then enter the value(s) or value set(s), clicking **Next Value Set** between each entry or set of entries. See [Entering Dynamic Qualifier Values for Templates](#) for details.
16. Click **Mass Create Territories**.

The system creates territories with generated names in the form:

<template name> - GENERATED TERRITORY #<number>

For example, the territory template named "US Time Zones" generates three territories with the following names:

US Time Zones - GENERATED TERRITORY #1

US Time Zones - GENERATED TERRITORY #2

US Time Zones - GENERATED TERRITORY #3
17. Click **Save** on the toolbar.

Entering Static Qualifier Values for Templates

Use this procedure while creating territory templates to enter values for static qualifiers. Static qualifiers have just one value in all the territories you are mass creating.

Prerequisites

You must be [creating territory templates](#) to use this procedure.

Steps

1. Select the qualifier at the top of the window.

The possible value type(s) appear below.

For example, if you are entering values for the Name of Customer qualifier, then you can enter only one value: the name of the customer.

If you are entering values for the Interest Type qualifier used in sales applications, then you can enter three values: for the interest type, for the primary and for the secondary interest.

2. Use the Operator list of values to select an operator.

Note: The list of operators varies depending on the type of qualifier you use. Some qualifiers, such as Name of Customer, allow only the = operator.

3. Enter the value(s) in the fields provided. Some operators allow you to enter a range of values; others only a single value.

Note: The number of fields and field names change depending on the qualifier.

4. When you are finished entering all of the values, complete the procedure for [creating territory templates](#).

Entering Dynamic Qualifier Values for Templates

Use this procedure while creating territory templates to enter values for dynamic qualifiers. Dynamic qualifiers have a different value in each territory you create.

Prerequisites

You can use this procedure only while [creating territory templates](#).

Steps

1. Select the qualifier at the top of the window.

The possible value type(s) appear below.

For example, if you are entering values for the Name of Customer qualifier, then you can enter only one value: the name of the customer.

If you are entering values for the Interest Type qualifier used in sales applications, then you can enter three values: the interest type, the primary interest, and the secondary interest.

2. Use the Operator list of values to select an operator.

Note: The list of operators varies depending on the type of qualifier you use. Some qualifiers, such as Name of Customer, allow only the = operator.

3. Enter the value(s) in the fields provided. Some operators allow you to enter a range of values; others only a single value.

Note: The number of fields and field names change depending on the qualifier.

4. Click **Next Value Set**.

A new entry line opens.

5. Enter the next value or set of values in the same manner.

6. Repeat this procedure for all the values for this qualifier.

Each time you click **Next**, the Value Set number increases by one.

For example, if you wish to enter all the states of the United States as values for the dynamic qualifier State, then:

- a. Enter the first state.
- b. Click **Next**.
- c. Enter the second state.
- d. Click **Next**.
- e. Repeat the procedure for each of the remaining states.

7. When you have entered all of the values, complete the procedure for [creating territory templates](#).

Example of Creating Geographical Territories Using a Template

Suppose you wish to create territories for telephone support and field service engineers for different city branches of two large customers IBM and Sun Microsystems.

Also assume you want to ensure the field service engineers are located in the same city as the branch they service.

You want to create four territories for each city. For example:

- IBM-San Francisco Telephone Support
- IBM-San Francisco Field Service
- Sun Microsystems- San Francisco Telephone Support
- Sun Microsystems- San Francisco Field Service

Below are the sample steps required to create territories for this hypothetical example.

Sample Steps

1. Navigate to **Admin >Territory Management >Mass Create Territories**.
2. In the Overview tab, **set up the basic information about the territory template**.
3. In the Transaction Qualifiers tab, **set up the two transaction qualifiers and their values: customer name and city**.
4. In the Resource Qualifier tab, **enter the qualifiers that are used to pick the resources who handle the transactions you set up in the Transaction Qualifier tab**.

If you are setting up geographic territories and you wish the resources to come from the same geographical area as the transactions, then you must set up a geographical structure for the resource qualifiers that is parallel to the one you set up for the transaction qualifiers.

In this example you wish to ensure that the field service engineers are from the same city as the accounts they service. The geographical transaction qualifier is City, so you must use City for your resources as well.

The two resource qualifiers used in this example are: Job Title and City. Here are the detailed setup steps:

5. **Click Mass Create Territories.**

The system creates territories with generated names in the form:

IBM/Sun by city - GENERATED TERRITORY #1

IBM/Sun by city - GENERATED TERRITORY #2

IBM/Sun by city - GENERATED TERRITORY #3

...

6. Open up each generated territory.
7. Change the generated name to one you recognize.
8. In the Resources tab, click **Auto Assign Resources**.
9. The Qualifying Resources window displays a list of people that fit the resource qualifiers values you have entered.
10. Select the people you wish to assign to this territory by checking the assign check box next to their name.
11. Click **OK** when you are done.
12. Next to the name of the person you wish to become the primary contact for the territory, check the **Primary Contact** check box.
13. For each resource you can add a start and end date if you wish to limit their participation.
14. Click **Save** on the toolbar.

Setting Up Overview Information

Here are the steps for setting up the template overview information for the example:

1. In the Usage field, use the List of Values (LOV) to select the type of application using this territory template. Your selection limits the types of qualifiers you can use in the territory template definition.
2. Enter a descriptive name and description for the territory template. In this example: IBM/Sun by city.
3. If you want to limit the time the territory template is effective, then enter the dates. By default the territory template becomes effective on the date you create it.
4. In the Navigator, select the parent territory for the territories created by the template. This is the territory that is one above in the territory hierarchy.
5. Right-click with the mouse in the Parent field. This enters the territory name highlighted in the navigator as the parent territory.
6. Use the LOV to select one or more types of transactions that will be assigned to each territory. Available values depend on your application and include account, lead, opportunity, and service request.

Setting Up Transaction Qualifiers

Here are the steps for setting up transaction qualifiers for the example:

1. Select the Transaction Qualifiers tab.
2. Use the LOV to enter the City and Customer Name qualifiers in the Qualifier Type fields.
3. From the Qualifier Mode drop-down list, select **Dynamic** for both qualifiers because both change in the territories are creating.
4. Select the City qualifier by clicking on it.
5. Select = as the operator.
6. Enter the first city, San Francisco, as a value for the City qualifier.
7. Click **Next**.
8. Repeat steps 12 through 14 for every city you are creating territories for.
9. Select the Customer Name qualifier in the qualifier region.
10. Select = as the operator.
11. Enter the first of the two companies, IBM, as a value for the Customer Name qualifier.
12. Click **Next**.
13. Enter Sun Microsystems as a value for Customer Name in the same way.

Setting Up Resource Qualifiers

Here are the steps for setting up resource qualifiers for the example:

1. Select the Resource Qualifiers tab.
2. Add the Job Title qualifier at the top of the window.
3. Add the City qualifier at the top of the window.
4. From the Qualifier Mode drop-down list, select **Dynamic** for both qualifiers because both change in the territories are creating.
5. Select the City qualifier by clicking on it.
6. Select = as the operator.
7. Enter the first city, San Francisco, as a value for the City qualifier.

8. Click **Next**.
9. Repeat the preceding three steps for every city you are creating territories for.
10. Select the Job Title qualifier at the top of the window.
11. Select = as the operator.
12. Use the LOV to select the first of the two job classifications: Telephone Support.
13. Click **Next**.
14. Enter the second job classification, Field Service, in the same way.

Creating Custom Qualifiers

You can create qualifiers for use within your application. This procedure outlines the creation of a sample qualifier that assigns territories by a company's Dunn & Bradstreet number.

Prerequisites

- Knowledge of SQL.
- Understanding and access to the Technical Reference Manual for your application.

Sample Steps

1. From the Admin menu, choose **Setup Qualifiers**.

The Setup Qualifiers window appears.

2. Click **Define Custom**.

The Organization Name displays the organization that can use this custom qualifier. This is the same organization as the one assigned to the Territory Administrator. A System Administrator can change the organization by modifying the Territory Administrator responsibility.

3. Use the Source Name list of values (LOV) to enter the Oracle CRM application using this custom defined qualifier.
4. Use the Qualifier Type LOV to enter the type of qualifier you wish to create. To create the Dunn & Bradstreet qualifier in this example, select Account.
5. Use the Table LOV to select the table that is the source of your qualifier. In this example, HZ_PARTIES.

6. Enter the Table Alias. In this example: `HZP`. This is the alias for the table that is the source of the qualifier.
7. Use the Column LOV to enter the table column. For this example, select `DUNS_NUMBER`.
8. Enter the alias for the column that the qualifier is sourced from. For this example, `DUNS_NUMBER`.
9. Enter the Name of the Qualifier. For this example, `Dun & Bradstreet Number`.
10. Enter a Description for the Qualifier.
11. Make sure the Enable Flag check box is checked to enable this qualifier.
12. Select one of the Display Type radio buttons depending on what type of data representation you wish the users to see.

This selection determines how values are displayed in the Transaction Qualifier and Resource Qualifier tabs of the Territory Details window.

For example, the list of values for a customer contains two values: a customer name and a customer ID number. If you select the Char option, then the user entering a customer name in the Territory Details window sees the actual customer name. If you select Numeric, then the user sees the customer ID number rather than the customer name as the displayed value.

The setting you choose does not affect the way data is processed by the module, only its display.

Note: The Special display type radio button is not enabled in this release.

13. In SQL for List of Values text box, enter the SQL statement you wish to use to populate the list of values that is used by territory administrators to enter value for the qualifier in the Territory Details window.

For this example, enter: `SELECT hzp.duns_number col1_value, NULL col2_value FROM hz_parties hzp`

It is important to enter the column aliases (`col1_value` and `col2_value`), as these are mapped to the columns displayed in the LOV in the Territory form.

14. Click on **OK** to save your work.

15. The final step in qualifier creation is to modify the view that corresponds to the territory qualifier type. This view is the source of the transaction records that are assigned to territories.

In order to use the Dunn & Bradstreet Number qualifier, you must add it to the view as shown below.

This is done by changing the value of attribute1 from NULL to PARTY.DUNS_NUMBER.

Each product passing values into the Territory Module API has its own view. Please refer to your Technical Reference Manual for more information.

Note: The view name and structure varies with each application using the territory module.

Sample view:

```
CREATE OR REPLACE VIEW apps.RELEVANT_VIEW
(  city
,  postal_code
,  state
,  province
,  county
,  country
,  interest_type_id
,  primary_interest_id
,  secondary_interest_id
,  contact_interest_type_id
,  contact_primary_interest_id
,  contact_secondary_interest_id
,  party_site_id
,  area_code
,  party_id
,  comp_name_range
,  third_party_flag
,  num_of_employees
,  line_of_business
,  party_relationship_id
,  sic_code
,  attribute1
,  attribute2
,  attribute3
,  attribute4
```

```
, attribute5
, attribute6
, attribute7
, attribute8
, attribute9
, attribute10
, attribute11
, attribute12
, attribute13
, attribute14
, attribute15
)
AS
SELECT
  LOC.CITY,
  LOC.POSTAL_CODE,
  LOC.STATE,
  LOC.PROVINCE,
  LOC.COUNTY,
  LOC.COUNTRY,
  INT.INTEREST_TYPE_ID,
  INT.PRIMARY_INTEREST_CODE_ID,
  INT.SECONDARY_INTEREST_CODE_ID,
  INTCI.INTEREST_TYPE_ID,
  INTCI.PRIMARY_INTEREST_CODE_ID,
  INTCI.SECONDARY_INTEREST_CODE_ID,
  PARTY_SITE.PARTY_SITE_ID,
  CONT_POINT.PHONE_AREA_CODE,
  PARTY.PARTY_ID,
  PARTY.PARTY_NAME,
  DECODE(RELATION.PARTY_RELATIONSHIP_TYPE, 'PARTNER', 'Y', 'N'),
  PROFILE.EMPLOYEES_TOTAL,
  PROFILE.LINE_OF_BUSINESS,
  RELATION.PARTY_RELATIONSHIP_ID,
  PARTY.SIC_CODE,
  PARTY.DUNS_NUMBER,
  NULL,
  NULL,
  NULL,
  NULL,
  NULL,
  NULL,
  NULL,
  NULL,
  NULL,
  NULL,
```

```
        NULL,  
        NULL,  
        NULL,  
        NULL,  
        NULL  
    FROM  
        HZ_PARTIES PARTY,  
        HZ_PARTY_SITES PARTY_SITE,  
        HZ_LOCATIONS LOC,  
        HZ_CONTACT_POINTS CONT_POINT,  
        HZ_PARTY_RELATIONSHIPS RELATION,  
        HZ_ORGANIZATION_PROFILES PROFILE,  
        AS_INTERESTS_ALL INT,  
        AS_INTERESTS_ALL INTCI  
    WHERE  
        PARTY.PARTY_ID = PARTY_SITE.PARTY_ID  
        AND PARTY.PARTY_ID = RELATION.PARTY_ID (+)  
        AND PARTY_SITE.LOCATION_ID = LOC.LOCATION_ID  
        AND ((PARTY.PARTY_TYPE = 'PERSON') OR (PARTY.PARTY_TYPE =  
        'ORGANIZATION'))  
        AND CONT_POINT.OWNER_TABLE_NAME(+) = 'HZ_PARTIES'  
        AND CONT_POINT.OWNER_TABLE_ID(+) = PARTY.PARTY_ID  
        AND PROFILE.PARTY_ID = PARTY.PARTY_ID  
        AND INT.ADDRESS_ID = PARTY_SITE.PARTY_SITE_ID  
        AND INTCI.ADDRESS_ID = PARTY_SITE.PARTY_SITE_ID  
        AND INT.INTEREST_USE_CODE = 'COMPANY_CLASSIFICATION'  
        AND INTCI.INTEREST_USE_CODE = 'CONTACT_INTEREST'
```

Using Task Manager

This topic group 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.

Creating and Updating Tasks

Tasks consist of work assignments that detail the actions required of company personnel. Use this procedure to create or update a task.

Prerequisites

Before you create a task from a template, a template design must exist.

Steps

1. Navigate to Task Manager.
2. In the Find Tasks window, click **New**.
The Tasks window opens.
3. Use one of the following procedures to create a task:
 - a. Select the template information from the list of values for the required fields, and click **Create Tasks**.
 - b. Click **Create Task from Template** to use a template.

The Create Tasks from Template Group window opens.

Enter your basic task information into the required fields by selecting from each list of values.

4. Click **More.**

The Task Details window opens.

- 5. In the Resource tab, define Requirements by selecting from the list of values for each field.**
- 6. In the Dependencies tab, enter the task dependencies by selecting from the list of values for each field.**
- 7. In the References tab, enter the reference objects by selecting from the list of values for each field.**
- 8. In the Recurrences tab, enter the recurrence rules by selecting from the option buttons and the list of values for each field.**
- 9. In the Resources tab, enter the resource assignments by selecting from the list of values for each field.**
- 10. Save your task.**

The new task number appears in the task spread table.

- 11. If you want to update a task, then perform the following steps:**
 - a. Navigate to Task Manager.**
 - b. In the Find Tasks window, click **Find**.**
 - c. The Tasks window opens.**
 - d. Update information.**
 - e. Save your changes.**

Guidelines

Clicking **Launch Workflow** in the Tasks window automatically reserves the designated resources and notifies the task owner of task creation via e-mail.

See Also

[Designing Task Templates](#)

[Launching Task Workflow](#)

Setting Dependencies for Tasks

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. Use this procedure to set task dependencies.

Prerequisites

A task must exist before you can set dependencies for it.

Steps

1. Navigate to Task Manager.
2. In the Find Tasks window, find or create a task.
The Tasks window opens.
3. Click **More**.
The Task Details window opens.
4. In the Dependencies tab, select the dependent task number from the list of values in the Task Number field.
The corresponding task name populates the Task Name field.
5. Enter a numerical value in the Offset field.
6. Select from the list of values in the UOM field and click **OK**.
7. Save your task.

A task dependency now exists for the original task.

Guidelines

Use a numerical value of time in the Offset field. The Offset value determines the time that separates the action of initial tasks from subsequent tasks. Use this feature to organize tasks with time-sensitive restrictions.

See Also

[Creating and Updating Tasks](#)

Assigning and Scheduling Resources

Define resources as the tools and personnel necessary for the completion of a task. The task owner assigns and schedules the required resources after choosing the best available options. Use this procedure to assign and schedule resources.

Prerequisites

None

Steps

1. Navigate to Task Manager.
2. In the Find Tasks window, find or create a task.
The Tasks window opens.
3. Click **More**.
The Task Details window opens.
4. In the Resources tab, select from the list of values in the Resource Type field.
Choosing **Select** populates the Assignments Type and Name fields for the corresponding Resource Type.
5. Enter a numerical value in the Unit field.
The Unit value determines the numbered amount of a particular resource.
6. Select from the list of values in the Type and Name fields.
7. If you want to schedule a resource, then select **Schedule**.
Enter scheduled distance and duration values, and select a unit of measure.
8. If you want to update actual schedule information, scroll right and enter the actual values in the required fields and click **OK**.
9. Save your task.
Resource assignment and scheduling is complete.

Guidelines

The Enabled check box allows you to activate varied resources according to task. Use this option to select live resources when updating.

For tracking purposes, update the Actual schedule fields after task completion.

See Also

[Creating and Updating Tasks](#)

Scheduling Recurring Tasks

Schedule a task to automatically reoccur daily, weekly, monthly, or yearly. Use this procedure to schedule recurring tasks.

Prerequisites

None

Steps

1. Navigate to Task Manager.
2. In the Find Tasks window, find or create a task.
The Tasks window opens.
3. Click **More**.
The Task Details window opens.
4. In the Recurrences tab, select an Occurrence option.
5. Select from the list of values in the required fields and click **OK**.
6. Save your task.

The task now reoccurs automatically.

See Also

[Creating and Updating Tasks](#)

Tracking Planned, Scheduled, and Actual Dates

Track task progress by entering date information after three task milestones:

- Task creation
- Resource reservation
- Task completion

Use this procedure to track planned, scheduled, and actual dates.

Prerequisites

None

Steps

1. Navigate to Task Manager.
2. In the Find Tasks window, find or create a task.
The Tasks window opens.
3. In the Dates section, enter information into the Planned fields.
The application populates the GMT field with the correct Greenwich Mean Time Deviation value.
4. After reserving resources for the task, enter information into the Scheduled fields.
5. Upon task completion, enter final information into the Actual fields.
6. Save your task.
Reference date information to track task completion status.

Guidelines

Updating the Actual Start and End Dates in the Resource tab populates the corresponding Actual date fields in the main Task form.

See Also

[Creating and Updating Tasks](#)

[Assigning and Scheduling Resources](#)

Setting Task Flags

Use task flags to select different configurations for each task. Setting flags customizes each task according to your needs. Use this procedure to set task flags.

Prerequisites

None

Steps

1. Navigate to Task Manager.
2. In the Find Tasks window, find or create a task.
The Tasks window opens.
3. Click **More**.
The Task Details window opens.
4. In the Miscellaneous tab, select task flags.
For a detailed description of flag options, see the Task Flag Definitions table in the See Also section.
5. Click **OK**.
6. Save your task.
The task owner receives the task flagged as a Milestone.

Guidelines

Optionally, design templates with predetermined flags.

See Also

[Creating and Updating Tasks](#)

[Designing Task Templates](#)

Task Flag Definitions

Task Flag	Definition/Action
Auto Notification	Launch notification workflow automatically.
Milestone	Indicate task importance.
Private	Restrict task access to non-task owners.
Publish	Allow task notification to non-task owners.
Restrict Closure	Require the completion of a child task before a parent task.

Documenting Multiple Contact Information

Associate more than one person's name and contact information with a task. Use the Contacts tab to document the complete list of contacts for a particular task while defining the primary contact individual. Use this procedure to document multiple contact information.

Prerequisites

None

Steps

1. Navigate to Task Manager.
2. In the Find Tasks window, find or create a task.
The Tasks window opens.
3. Click **More**.
The Task Details window opens.
4. In the Contacts tab, enter information into the Contacts fields.
5. Enter the corresponding telephone information into the Contact Telephones fields.
6. Select the Primary checkbox to mark the primary contact individual and click **OK**.
7. Save your task.
The task contact information is recorded.

Guidelines

Also use the Contacts tab to enter contact information for dependent tasks. The contact individual may differ for task dependencies. Entering multiple contacts and selecting one as the primary records the correct communication channel for the selected task.

See Also

[Creating and Updating Tasks](#)

[Setting Dependencies for Tasks](#)

Tracking a Task Record

The task record documents and dates the history of task change. Each update to a task results in an entry to the task record. The task record provides a trail from the original task through to the current task status. Use this procedure to access the task record.

Prerequisites

None

Steps

1. Navigate to Task Manager.
2. In the Find Tasks window, find or create a task.
The Tasks window opens.
3. Click **More**.
The Task Details window opens.
4. In the Audit tab, view the task history.
Each row documents the status of the task. The bottom row contains the most recent task record.
5. Scroll to the right to view the New and Old values.
6. Click **OK** to return to the Task Details window.

Guidelines

The Audit tab contains a read-only record of the task change.

See Also

[Creating and Updating Tasks](#)

Launching Task Workflow

Define workflow as the actions following a task creation or update. After creating or updating a task, you need to notify the task assignees of their involvement. The Launch Workflow feature automates this process and contacts the necessary parties via e-mail.

Prerequisites

None

Steps

1. Navigate to Task Manager.
2. In the Find Tasks window, find or create a task.
The Tasks window opens.
3. Click **More**.
The Task Details window opens.
4. Select the Resources tab.
5. Create an Assignee by filling in the fields from the list of values.
6. Click **OK**.
7. In the Task Details window, click **Launch Workflow**.
8. Save your task.
Workflow e-mails the task owner and resource scheduler with the task creation or update information.

See Also

[Creating and Updating Tasks](#)

[Setting Task Flags](#)

Linking Tasks to Source Documentation

Linking a task to a source document allows you to reference pertinent background information. Define source documentation as the original request document that resulted in the creation of a task. Use this procedure to link a task to its source document.

Prerequisites

None

Steps

1. Navigate to Task Manager.
2. In the Find Tasks window, find or create a task.
The Tasks window opens.
3. Click **More**.
The Task Details window opens.
4. In the References tab, select from the list of values in the Reference Type field.
The application populates the Details field with a description of the reference type.
5. Enter the identification number of the source document in the Number field.
6. Optionally, enter additional information into the Usage and Reference Code fields.
7. Click **OK**.
The type and number information populate the Source Doc Type and Source Doc Number fields in the main task list.
8. Save your task.
The source document now links to its corresponding task.

Guidelines

Double-clicking the Source Doc field in the main task screen brings up the source document for viewing.

See Also

[Creating and Updating Tasks](#)

Understanding Oracle Interaction History

This topic group provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationship to other Oracle or third-party applications.

The topics covered in this group include:

- [Oracle Interaction History Overview](#)
- [How does Oracle Interaction History Work?](#)
- [Oracle Interaction History's Dependencies and Integration](#)
- [Oracle Interaction History Features](#)
- [Oracle Interaction History Process Flow](#)

Oracle Interaction History Overview

Oracle Interaction History tracks all customer-agent interactions and serves as a repository for the interaction data. You can view the interaction data as well as the Oracle CRM application data associated to the interaction. Activities associated to each customer-agent interaction can also be viewed. Within Oracle Interaction History, you can filter interaction and activity views. Any notes that have been entered for an interaction or activity will also display for viewing.

What is an Interaction?

An interaction is a point of contact and may relate to customers, campaigns, agents, orders, quotes, etc. This point of contact could be a direct interaction with a customer, the customer's system, a potential customer, or through an automated agent. An interaction is generally timed and has an outcome or result that can be tracked. Multiple activities can occur during the course of a customer interaction.

Each customer-agent interaction may include various forms of communication (i.e., media items).

What is an Activity?

An activity is a business act performed by an agent or automated agent as a part of a customer interaction. Interaction activities typically relate to the media item for which the activity occurred. Within the customer interaction, the interaction activity may involve how a media item was handled, (e.g., transferred call). It may also include details as it pertains to the Oracle CRM application, (e.g., request for product information or balance inquiry).

What is a Media Item?

Media items represent a media occurrence that is handled by an Oracle CRM application or a user of the application. They can be generated by a customer directly, the agent, the system or the Oracle CRM application. Media items can be inbound or outbound. For example, an e-mail sent from an agent to a customer would be an outbound media item.

How does Oracle Interaction History Work?

When a customer-agent interaction occurs, the interaction data is captured and tracked within Oracle Interaction History.

The following is an example of the types of interaction and activity data that is tracked:

- Customer
- Account number
- Agent
- Campaign
- Date and time
- Activity Type (Media and Activity)
- Outcome or result of interaction or activity
- Duration
- Notes

Oracle Interaction History's Dependencies and Integration

Oracle Interaction History is integrated with the following Oracle CRM applications.

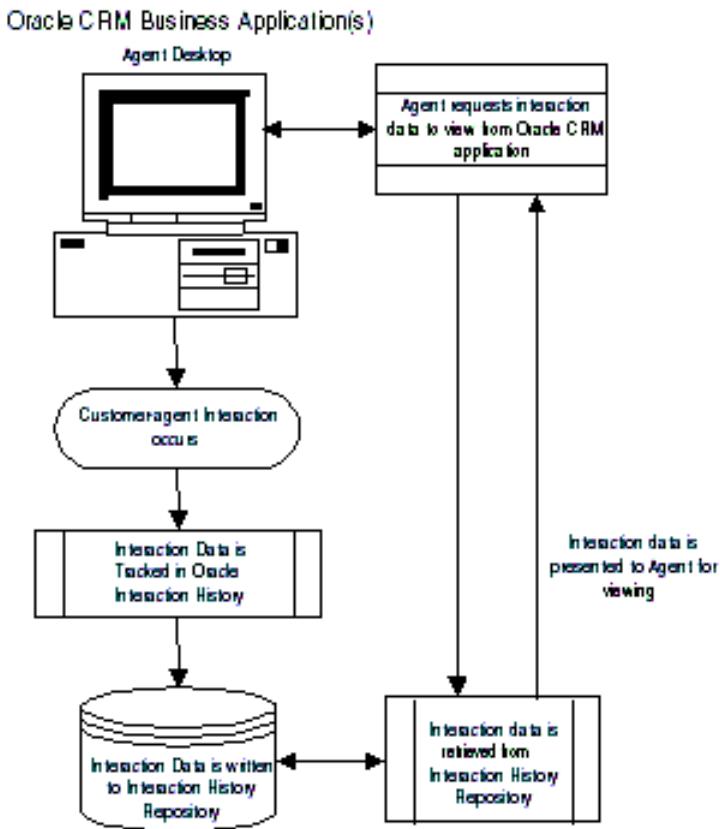
- Oracle Multi-Channel Manager
- Oracle iCenter
- Oracle Advanced Outbound
- Oracle Universal Work Queue
- Oracle Customer Care
- Oracle Support
- Oracle Telesales

Oracle Interaction History Features

Within Oracle Interaction History, you can view customer-agent interactions, activities and notes. Interactions can be filtered by customer, agent, campaign, date range, and account number. Activities can be filtered by customer, agent, activity type, media type, and date range.

Notes that exist for customer-agent interactions and activities are available for viewing in Oracle Interaction History.

Oracle Interaction History Process Flow



Using Oracle Interaction History

This topic group provides process-oriented, task-based procedures for using the application to perform essential business tasks.

The topics covered in this group include:

- [Searching Interactions](#)
- [Viewing Interactions](#)
- [Viewing Interaction Notes](#)
- [Searching Activities](#)
- [Viewing Activities](#)
- [Viewing Activity Notes](#)

Searching Interactions

You can search customer-agent interactions by identifying the criteria for which the search will be based. You can filter your search by customer, agent, campaign, date range, or account number. You may also search interactions by choosing a combination of values. For example, you may need to identify all campaigns that pertain to a particular customer.

Once identified, the filtered results will display in the Interactions tab in the Oracle Interaction History window. Use this procedure to search customer-agent interactions.

Prerequisites

A customer-agent interaction must exist in Oracle Interaction History.

Steps

1. Navigate to the Interactions Filtering Criteria Tab, enter the criteria for searching interactions in any of the following fields.
2. In the Customer field, enter the customer's name.
3. In the Agent field, enter the agent's name.

4. In the Campaign field, enter the campaign name.
5. In the Date from and to fields, click the list of values button in each field to display the calendar. Click the date on the calendar from which to begin the search. You may also specify the time. Click OK.

The date will display in the Date from field and you will automatically proceed to the Date to field.
6. Click the date on the calendar to end the date range. You may also specify the time. Click OK.

The date will display in the Date to field.
7. In the Account field, enter the customer's account number.
8. Click the Search button.

The interactions that exist for the search performed will display in the Interactions tab in the Oracle Interaction History window.

Guidelines

Sentence case must be used when entering the customer's or agent's name. For example, Fred Smith. A lookup of the customer's or agent's name, and campaign can be performed by placing the % sign after the partial entry. For example, when looking up Fred Smith, you would enter Fred Smi% to find all occurrences.

Viewing Interactions

Once you filter the interactions for viewing, the data associated to the interaction(s) will display in the Interactions tab. Any notes that were entered for an interaction in the Oracle CRM application will display in the modal window of the Interactions tab. Use this procedure to view customer-agent interactions.

Prerequisites

A customer-agent interaction must exist in Oracle Interaction History.

Steps

1. From the Interactions tab, click on the interaction to view or use the scroll bar to scroll through the interactions.

The interaction data is grouped within columns and rows. Dragging your mouse over the heading of a column will display a description of the column as a tool tip. You can expand and collapse columns in the Interactions tab as

needed. By default, the first interaction that matches the criteria for the search will be highlighted. A sort indicator will appear in the column header for the column for which the primary sort occurred. A record indicator will display for the row currently highlighted.

You can scroll across the Interactions tab to view the columns information for the interaction.

Any notes that were entered for an interaction in the Oracle CRM application will display in the modal window of the Interactions tab.

2. When finished viewing the interaction(s), close the Oracle Interaction History window.

Viewing Interaction Notes

Notes that have been entered for customer-agent interactions display in the modal window in the Interactions tab. Use this procedure to view interaction notes.

Prerequisites

A note must have been entered for the customer-agent interaction in an Oracle CRM application.

Steps

1. From the Notes window in the Interactions tab, select the note to view.
2. When finished viewing the interaction note, click on another interaction to view another note or close the Oracle Interaction History window to exit from the interaction view.

Searching Activities

You can search customer-agent interactions by activity. You can filter your search by customer, agent, activity type, media type, date range, or account number. You may also search activities by choosing a combination of search parameters. For example, you could search for activities by activity type, customer, and date range.

Once you identify the search parameters, the filtered results will display in the Activities tab in the Oracle Interaction History window. Use this procedure to search activities within customer-agent interactions.

Prerequisites

An activity must exist for the customer-agent interaction in Oracle Interaction History and the Oracle CRM application.

Steps

1. Navigate to the Activities Filtering Criteria tab, enter the criteria for searching activities in any of the following fields.
2. In the Customer field, enter the customer's name.
3. In the Agent field, enter the agent's name.
4. In the Activity Type field, enter the type of activity.
5. In the Media Type field, enter the type of media.
6. In the Date from and to fields, click the of values button in each field to display the calendar. Click the date on the calendar from which to begin the search. You may also specify the time. Click OK.

The date will display in the Date from field and you will automatically proceed to the Date to field.

7. Click the date on the calendar to end the date range. You may also specify the time. Click OK.
8. The date will display in the Date to field.

8. Click the Search button.

The activities that exist for the search performed will display in the Activities tab in the Oracle Interaction History window.

Guidelines

Sentence case must be used when entering search parameters in any of the fields in the Activities Filtering Criteria tab. For example, Ann Johnson. A lookup of the customer's or agent's name can be performed by placing the % sign after the partial entry. For example, when looking up Ann Johnson, you would enter Ann John% to find all occurrences.

Viewing Activities

Activities performed for a customer-agent interaction in an Oracle CRM application are viewed from the Activities tab in Oracle Interaction History. Use this procedure to view activities for customer-agent interactions.

Prerequisites

A customer-agent interaction must exist in Oracle Interaction History.

Steps

1. From the Activities tab, click on the activity to view or use the scroll bar to scroll through the activities.

The activity data is grouped within columns and rows. Dragging your mouse over the heading of a column will display a description of the column as a tool tip. You can expand and collapse columns in the Activities tab as needed. By default, the activity that matches the criteria for the search will be highlighted. A sort indicator will appear in the column header for the column for which the primary sort occurred. A record indicator will display for the row currently highlighted.

You can scroll across the Activities tab to view the columns information for the activity.

Any notes that were entered for an activity in the Oracle CRM application will display in the modal window of the Activities tab.

2. When finished viewing activities, click on another activity or interaction to view.

Viewing Activity Notes

Notes that have been entered for an interaction activity will display in the modal window in the Activities tab. Use this procedure to view activity notes.

Prerequisites

A note must have been entered for the interaction activity in an Oracle CRM application.

Steps

1. From the Notes window in the Activities tab, select the note to view.
2. When finished viewing the activity note, click on another activity to view another note or close the Oracle Interaction History window to exit from the activity view.

Administering Interaction History

This topic group provides task-based procedures that are required for ongoing system maintenance and includes information on administration tools and utilities.

Overview of Interaction History Administration

Use the Interaction History Administration window to define attributes that users can assign to interaction records. This section covers the following tabs in the Interaction History Administration window:

- [Outcomes](#)
- [Results](#)
- [Outcome-Results](#)
- [Results-Reasons](#)
- [Wrap-Ups](#)

Defining Outcomes

The outcome is the immediate response to an agent's call, such as Contact, No Answer, or Busy. One outcome can be used by more than one campaign. To close an interaction the agent must report an outcome. Use the following procedure to define the outcomes that the agent can use.

Steps

1. In the CRM Administrator responsibility, navigate to Interaction History Administration.
2. Select the Outcomes tab.

The Outcome Code and Short Description fields must be defined. Some pre-defined values are available for these fields.

3. Click on the Outcome Code field and choose **View > Find All**.

The pre-defined values are now visible in the Outcome Code and the Short Description fields.

4. Click the Up or Down arrow keys to review all the pre-defined values. You can also enter your own values in either field.
5. If you need to use Numeric Values, check the Telephony Related box. Select either Success option—Yes or No—and enter the appropriate Numeric Value. Yes has a range of 1 to 100; No has a range of 101 to 255.
6. Choose whether the outcome requires a Private or Public callback.
7. Choose **File >Save and Proceed** to save the outcome definition.

Guidelines

Some telephony-related applications use Numeric Values, which are recorded as the Versatility Code in database tables. Versatility Codes are used by version 3i of the following applications: Oracle TeleBusiness for Telecom/Utilities, Oracle TeleBusiness for Financial Services, Oracle Integration Manager, and Oracle Campaign Plus. If you do not use these earlier applications, you do not need to use Numeric Values.

Defining Results

A result of a transaction is the business-related consequence of the agent's call, such as Sale, No Sale, or Complaint. While all transactions must have an outcome, a result is not mandatory. Use the following procedure to define a result.

Steps

1. In the CRM Administrator responsibility, navigate to Interaction History Administration.
2. Select the Results tab.
The Results Code and Short Description fields must be defined. Some pre-defined values are available for these fields.
3. Click on the Results Code field and choose **View > Find All**.
The pre-defined values are now visible in the Results Code and the Short Description fields.
4. Click the Up or Down arrow keys to review all the pre-defined values. You can also enter your own values in either field.

5. If the business rules of the enterprise require a Reason for every Result, check the Reason Required box.

You may also define Result-Reason pairs. See [Pairing a Result with a Reason](#).

6. Choose **File >Save and Proceed** to save the result definition.

Pairing an Outcome with a Result

You can create a new option by pairing an Outcome with a Result. Any Outcome may be paired with more than one Result. Each pair appears as one option on the agent's screen.

Note: Each Outcome-Result pair must be unique.

Steps

1. In the CRM Administrator responsibility, navigate to Interaction History Administration.
2. Select the Outcome-Results tab.
3. Select a value from the Outcomes list.
4. Select a value from the Results list.
5. Choose **File >Save and Proceed** to save the Outcome-Result pair.

Guidelines

The values on the Outcomes list were defined on the Outcomes tab. The values on the Results list were defined on the Results tab.

See also

[Defining Outcomes](#)

[Defining Results](#)

Pairing a Result with a Reason

You can create a new option by pairing a Result with a Reason. Any Result may be paired with more than one Reason. Each pair appears as one option on the agent's screen.

Note: Each Result-Reason pair must be unique.

Steps

1. In the CRM Administrator responsibility, navigate to Interaction History Administration.
2. Select the Result-Reasons tab.
3. Select a value from the Result list.
4. Select a value from the Reason list.
5. Choose **File >Save and Proceed** to save the Result-Reason pair.

Guidelines

The values on the Results list were defined on the Result tab. The values on the Reasons list were defined on the Reason tab.

See also

[Defining Results](#)

Defining a Wrap-Up

A wrap-up is a summary of a transaction that an agent enters after completing a transaction. A Promotion code and Campaign Type are essential elements in the definition of a wrap-up. When an agent is working on a specific promotion, the wrap-ups defined for that promotion become available on the agent's screen.

The business rules of an enterprise determine whether or not to include the Outcome Code, Result Code and Reason Code in the definition of the wrap-up.

Use this procedure to define a wrap-up for an interaction.

Steps

1. In the CRM Administrator responsibility, navigate to Interaction History Administration.
2. Select the Wrap-Ups tab.
3. Choose values for Promotion Code and Campaign Type. Choose values for the remaining codes when required.
4. Choose **File >Save and Proceed** to save the wrap-up definition.

Understanding Oracle 1-to-1 Fulfillment

This topic group provides overviews of Oracle 1-to-1 Fulfillment and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications.

Note: Oracle 1-to-1 Fulfillment is a module that is called from other CRM applications. It is not designed to be, nor should it be used as, a stand-alone product.

Typical "product users" of 1-to-1 Fulfillment include the following:

- Products that provide functionality for call center administrators and agents
- Products that provide functionality for mobile field sales or service representatives
- Products that provide functionality for marketing managers
- Products that provide functionality for customer care representatives

Key components Oracle 1-to-1 Fulfillment include the following:

- Agent and administrator interface screens that users can embed into Oracle Customer Relationship Management applications. These interfaces are given to other CRM applications to help them with their integration to the Oracle 1-to-1 Fulfillment product.
- Templates that support a wide range of fulfillment scenarios
- Administrative tools that support the definition and modification of fulfillment templates and other fulfillment functions

- Use of Oracle Workflow Builder to launch a request, manage the request as it moves through the fulfillment cycle, monitor the status of each fulfillment request, and notify users about the disposition of particular events. This is another function that is available to other CRM applications for use in their products.
- Support of request processing and the queuing of output to email.

WARNING: Screens relating to either print, fax or file server functionality or capability are not supported at this time, and should not be used.

These capabilities are enhancements intended for future releases, but are not available in the current release of Oracle 1-to-1 Fulfillment.

Understanding Fulfillment Templates

A template is a pre-defined package of brochures, newsletters, or other customer-oriented information that an agent locates and directs to customers in answer to a fulfillment request. Managers or administrators set up templates in advance to include specific information materials, called *collateral*. Although fulfillment templates make the fulfillment process more efficient, they are not required to fulfill a request.

Templates include a master document that is mail-merged with customer addresses to become a cover letter. These master documents are uploaded and stored in the *Marketing Encyclopedia System* (MES).

Note: In Release 2.0.1 of 1-to-1Fulfillment, master documents can be created in Microsoft Word, saved as HTML files, edited in a text editor, and then uploaded to the MES. See [Uploading a Master Document to the Marketing Encyclopedia System](#).

When agents fulfill customer requests, a fulfillment server retrieves the master document and the MES database tables that contain the necessary information.

Administering Oracle 1-to-1 Fulfillment

This topic group provides task-based procedures required for ongoing system maintenance and includes information on administration tools and utilities.

Viewing or Updating Listed Items

To view more detail or make changes to an item listed on the selected screen, choose the item to open a detailed configuration screen.

Updating a Fulfillment Template

For each template, you may change the Name, Status, and Description.

Note: Changing the name of a template that is already in use may render that template inaccessible.

Prerequisites

None.

Steps

1. Click the Template tab.
The Template screen opens.
2. In the Template screen, choose the name of the template that you want to edit.
The View Template screen opens.
3. Edit the information as necessary.
4. Choose **Save**.

Changing a Template's Availability

If you want to prevent a template from being used for fulfillment requests, you can change the template's status.

To change the status of a template, use the following steps.

Prerequisites

None.

Steps

1. In the Template screen, choose the name of the template that you want to change.
The View Template screen opens.
2. In the Status pull-down list, choose the appropriate Status: **Active** or **Inactive**.
3. Choose **Save**.

Removing a Master Document from a Template

To remove a master document from a template, use the following steps.

Prerequisites

None.

Steps

1. Choose **Template**.
The Template screen opens.
2. In the Master Documents table, click **Go**.
The Master Documents table opens.
3. From the Select Master Document table, choose the master document that you want to remove.
You return to the Master Documents table.
4. Click in the **Remove** check box beside the master template that you want to remove.
5. Click **Save**.

Creating a Query

A query is an SQL statement that directs 1-to-1 Fulfillment to collect specific kinds of data from the database when fulfilling a request.

To create a query, use the following steps.

Prerequisites

None.

Steps

1. In the Query screen, choose **Create**.

The Create Query screen opens.

2. Enter a unique Name for the new query.
3. Enter a description for the new query.
4. Enter the SQL query string in the provided test field.

See the [SQL/PL Query Guidelines](#) following for details on creating a query.

5. Click **Create**.

You return to the Queries screen. The newly created query displays in the Queries list.

See also

[Updating a Query](#)

SQL/PL Query Guidelines

Warning: SQL/PL statements typically end with a semicolon (;). However, in this case, the query engine appends the semicolon itself. Do NOT append a semicolon to the end of this query.

Use the following syntax when creating an SQL/PL query:

```
SELECT <column name> <alias>,  
       <column name> <alias>,  
       <column name> <alias>,  
       <column name> <alias>
```

```
FROM <table name>
WHERE <column name> = :<bind variable>
```

In the above code:

- Standard SQL/PL commands are all in capital letters.
- Column names contain underscores.
- Column name aliases follow the column names and appear before the comma or the next keyword. You use aliases as substitutes in master documents for the actual (less friendly) column names.
- The table from which the columns are selected follows the FROM keyword.
- The bind variable specifies which row is pulled from the table to give the actual bits of data for each merged document. A colon in front of a bind variable makes it a global variable. This enables the query to recognize it after the value is passed in from the user interface.

For example:

```
SELECT person_last_name lname,
       party_id CustNumb,
       creation_date cdate,
       phone_number phone
  FROM jtf_contact_points_v
 WHERE person_first_name = :fname;
```

If you enter the above sample query as the query string, then the data source utility pulls the aliases rather than the column names when it creates the data source file.

The window opened by the data source utility would then show:

```
lname      CustNumb      cdate      phone
```

in a plain background window with nothing else.

Creating a Datasource File

A datasource file is a text file that contains tab-separated merge fields that have been obtained by parsing the selected query. Use datasource files to create master documents.

To create a datasource file, use the following steps.

Prerequisites

The query for the datasource file must already exist. See [Creating a Query](#).

Steps

1. In the Query screen, choose **Datasource**.
The Create Datasource File for Query screen opens.
2. From the Query Name drop-down list, choose the query.
The datasources appear in a separate browser window.
3. From the browser File menu, select **Save As**.
4. Choose plain text file as the file type (the.txt extension).
5. Navigate to the desired save location.
6. Click **Save**.
7. Close the browser window.

Downloading a Datasource File

Before a datasource file can be used in a master document, it must be downloaded.

Prerequisites

You must have already created the datasource file. See [Creating a Datasource File](#).

Steps

1. In the Datasource File Created for Query screen, right click on the **Datasource File** hypertext link.
2. From the drop-down menu, choose **Save Link As**.
The Save As dialog box opens.
3. Choose the file that you want to download, and click **Save**.

Adding a New Group

To add an agent group to a fulfillment server, use the following steps.

Prerequisites

None.

Steps

1. Choose the Server tab and then choose **Groups**.
The Groups screen opens.
2. Choose **Add**.
The Select Group screen opens.
3. From the drop-down list, choose the group to add to the fulfillment server.
4. Choose **Go**.
The Add Group screen opens.
5. In the Output Devices tables, choose the output devices to associate with this agent group. The output devices should be in a physical location accessible to the agents.
6. To make output devices available, choose the appropriate **Create** button.

Adding Agents to a Group

To add agents to a group, use the following steps.

Prerequisites

None.

Steps

1. Choose the Group tab.
The Groups screen opens.
2. In the Group Name column, click the name of the group to which you want to add agents.
The Group Details screen opens.
3. In the Agents table, choose **Go**.
The Agents screen opens.
4. Choose an agent from the list of available agents.

You return to the Group Details screen. The agent that you just chose is now listed in the Agents table.

5. Choose **Update.**

You return to the Groups screen.

6. To add additional agents, repeat steps 2 through 5.

See also

[Removing Agents from a Group](#)

[Creating New Groups](#)

[Re-configuring Groups](#)

[Modifying a Group-Device Association](#)

Removing Agents from a Group

To remove agents from a group, use the following steps.

Prerequisites

None.

Steps

1. Choose the Group tab.

The Groups screen opens.

2. In the Group Name column, click the name of the group to which you want to add agents.

The Group Details screen opens.

3. In the Agents table, click inside the check box in the Remove column.

4. Choose **Update.**

You return to the Group Details screen.

Creating New Groups

To create a new group, use the following steps.

Prerequisites

None.

Steps

1. Choose the **Groups** tab.
The Group Details screen opens.
2. Choose **Create**.
The Create Group screen opens.
3. Enter a unique name and description of the group.
4. Choose **Create**.
You return to the Group Details screen.
5. To add agents, choose the **Add** button and then choose which group to associate with the fulfillment server.
6. Choose **Save**, and then **Done**.

Re-configuring Groups

To re-configure a group, use the following steps.

Prerequisites

None.

Steps

1. Choose the **Groups** tab.
The Group Details screen opens.
2. Choose **the name the name of the group that you want to re-configure**.
The group details screen opens.
3. Change any information as necessary.

4. Choose **Update** to save the information to the database.

You return to the View Groups screen.

See also

[Re-configuring Fulfillment Servers](#)

Re-configuring Fulfillment Servers

To re-configure a fulfillment server, use the following steps.

Prerequisites

None.

Steps

1. Choose the Server tab.
The General screen opens.
2. Update the fields as necessary.
3. To re-configure email servers, choose **Continue**.

See also

[Re-configuring Email Servers](#)

[Re-configuring File Servers](#)

Re-configuring Email Servers

To re-configure an e-mail server, use the following steps.

Prerequisites

None.

Steps

1. Choose the Server tab, and then choose **E-mail Servers**.
The E-mail Servers screen opens.
2. Change information as necessary.

3. Choose the **Output ID** link to edit the e-mail server details, including Physical Name, Return Address, Incoming Server, and Outgoing Server.
4. To add a new e-mail server, choose **Add**.
5. To save, choose **Update**.

Re-configuring Fax Servers

WARNING: Screens relating to fax functionality or capability are not supported at this time, and should not be used.

Re-configuring File Servers

WARNING: Screens relating to file server functionality or capability are not supported at this time, and should not be used.

Re-configuring Printers

WARNING: Screens relating to either print functionality or capability are not supported at this time, and should not be used.

Modifying a Group-Server Association

Use the following procedure to remove an association between a device server and a group.

Prerequisites

An association between a group and a device server must exist.

Steps

1. On the Server tab, click the Fulfillment server name to which the group is associated.

The General screen displays a description of the Fulfillment server and lists additional links on the left.

2. Click the Groups link.
3. The Groups screen displays the groups associated to the fulfillment server with the device servers to which each group is associated.
4. Select the Remove box adjacent to the association you wish to remove.
5. Click **Update** to complete the process.

Uploading a Master Document to the Marketing Encyclopedia System

Before the mail merge of a master document and customer information has produced a cover letter, you must upload the master document to the Marketing Encyclopedia System where it will be available for fulfillment requests.

To upload a master document to the Marketing Encyclopedia System, use the following steps.

Prerequisites

- The master document must be an HTML file or an Adobe Acrobat PDF file.
- In HTML files, remove from the HTML code any propriety information inserted by the word processor, otherwise the server will not process the document. For example, saving a Microsoft Word document as HTML inserts Microsoft proprietary information in the <HTML> header tag, that is, a line in the header stating <META NAME = "Generator" CONTENT= "Microsoft Word 97" . To remove such propriety information, use a generic text editor such as Microsoft Notepad.

Note: If a Master Document requires information that must be pulled from a database table, you must create an appropriate query to associate with the master document. Otherwise, the correct data cannot be sent with the request fulfillment.

Steps

1. Choose the Template tab, and then choose **Upload Master Document**.

The Upload Master Document screen opens.

2. Click **Browse**.

The File Upload dialog box opens.

3. Choose the master document file and click **Open**.

The File Upload box closes and you return to the Upload Master Document screen.

4. Click **Upload**.

The Update Master Document screen opens.

5. Optionally, in the **Description** field, type a description of the master document.

6. From the Query drop-down list, choose a query to associate with the master document.

7. Choose **Update**.

You return to the Upload Master Document screen.

See also

- [Creating a Query](#)
- [Updating a Query](#)
- [Associate Master Document with Template](#)

Removing Output Devices and Groups

To remove an output device or agent group, use the following procedure.

Prerequisites

None.

Steps

1. Choose the Server tab.

The General screen opens.

2. In the Server Name column, choose the name of the relevant server.

3. In the Server Details area, choose the relevant option.

4. In the table, check the relevant **Remove** box.

5. Choose **Update**.

Updating a Query

To change the parameters or other specifications of a query, use the following procedure.

Prerequisites

You must have already created the query. See [Creating a Query](#).

Steps

1. Choose the Query tab, and the **Queries**.
The Update Query screen opens.
2. Update the information as necessary.
3. Choose **Update**.

Cancelling a Request

When you submit a fulfillment request, the request goes into a queue for processing. When the server begins to process the request, it extracts the request from the queue.

Note: Once the server extracts the request from the queue, you can no longer cancel the request.

To cancel a fulfillment request, in the Administrative Console choose the Status tab, and then in the appropriate request Action column choose **Cancel**.

Resubmitting a Fulfillment Request

Use the following steps to resubmit a fulfillment request.

Note: You can resubmit a successful request.

Prerequisites

You must have already created the fulfillment request.

Steps

1. Choose the Status tab and click the **History** link.

In the row that contains the request identifier that you want to resubmit, click **Resubmit**.

Understanding Assignment Manager

This topic group 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.

Overview of Assignment Manager

Use Assignment Manager to:

- Assign responsibility for documents and tasks
- Assess the availability of qualified resources needed to perform a task

The assignment process uses criteria based on preferred resources, availability, and territories. Oracle Scheduler provides additional features to optimize scheduling.

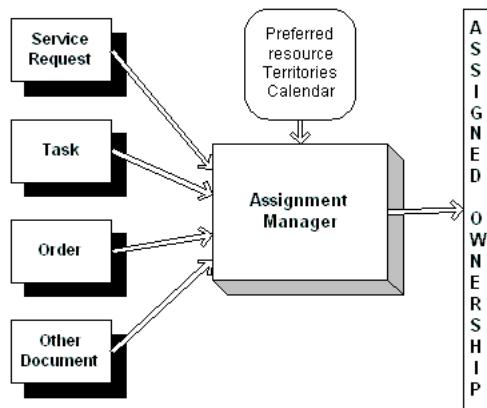
For more detail see:

- [Ownership Assignment](#)
- [Resource Availability Assignment](#)
- [Additional Features of Oracle Scheduler](#)
- [Options for Assigning Ownership and Availability](#)

Ownership Assignment

When you create a document or a task, you must assign an owner to it to ensure action is taken. A document owner can be a service manager, expediter, marketing, service, or sales person. A task owner can be a planner, dispatcher, or service representative. An owner is defined as a resource within Assignment Manager.

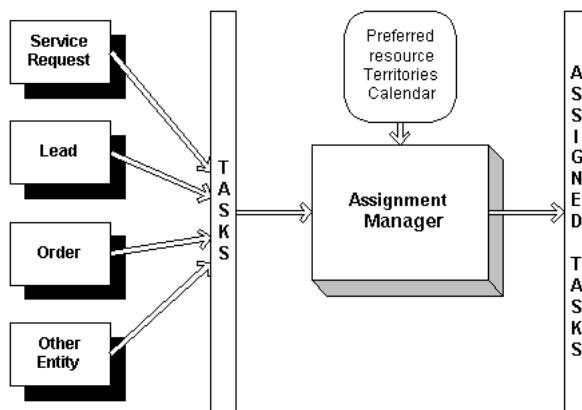
Ownership Assignment



Resource Availability Assignment

A resource must be available before it can perform a task in the field. Assignment manager uses the calendar to check the availability of a resource. When you assign a task to a resource, that resource becomes unavailable for the period of time described by that task.

Task Assignment demanding Resource Availability



Additional Features of Oracle Scheduler

Oracle Scheduler is an add-on option that is designed specifically for the needs of field service. Scheduler is especially helpful for users that have frequent schedule changes, relatively large geographical territories per service representative, or dense city areas. If you have Scheduler installed, then the Assignment Manager screen displays the Intelligent and Window to Promise options.

When you use the assignment manager to find an available resource, the information is passed to Oracle Scheduler. Scheduler then optimizes the schedule, based on travel time and a larger set of business-driven criteria.

Options for Assigning Ownership and Availability

There are several ways you can assign ownership and availability in Assignment Manager.

There are two options for assigning ownership.

Option	Description
Assisted	<p>Use this option if you want assignment manager to find a list of qualified resources based on a predefined set of criteria.</p> <p>With automatic assignment, when no resource can be found based upon the selection criteria, use the Assisted screen to adjust your criteria and perform a search.</p>
Unassisted	<p>Use this option if you want to assign a document without taking the criteria into account, or to overrule the criteria set.</p>

There are four options for assigning availability.

Option	Description
Assisted	<p>Use this option if you want assignment manager to find a list of qualified resources based on a predefined set of criteria.</p>
	<p>The resources calendar displays tasks and task status. When no qualified resource is shown, you must adjust your criteria and re-perform a search.</p>
	<p>With automatic assignment, when no resource can be found based upon the selection criteria, use the Assisted screen to adjust your criteria and perform a search.</p>
Intelligent	<p>An option specific to field service that is only available when Oracle Scheduler is installed. Oracle Scheduler assigns the task to a qualified resource.</p>
	<p>For more information, see Scheduling Intelligent.</p>
Window to Promise	<p>An option specific to field service that is only available when Oracle Scheduler is installed. The Window to Promise displays time intervals at which a resource (service representative) can visit the customer to perform the task.</p>
	<p>For more information, see Scheduling with the Window to Promise.</p>
Unassisted	<p>Use this option to assign a task without taking the criteria into account or actually overruling the criteria set.</p>

Assigning Process

The process of selecting a qualified resource is based upon selection criteria and customer selections. To make these criteria effective, some requirements need to be met. To understand the process for assigning documents and availability, the following is explained in more detail:

- [Assignment Manager Dependencies](#)
- [Assignment Manager Selection Criteria](#)
- [The Effect of Customer Selections](#)

Assignment Manager Dependencies

To make optimal use of Assignment Manager's capability of assigning ownership and availability, the following dependencies are required.

Dependency	Description
Preferred resource information	A preferred resource is a single person or a resource group that is defined in Oracle Contracts or recommended from the installed base in Oracle Service. When there is no preferred resource, use the Assignment Manager set-up screen to define a relation between document source and resource definition.
Territory definition	Territories are defined in Territory Manager. A territory has resources or resource groups assigned to it. For more information, see Territory Manager .
Task duration information	Task duration is essential for checking the availability of the resource and for designating a resource as unavailable in the resources calendar after a task has been assigned.
Resource's availability information	Availability of the resource is provided by the Oracle Calendar component in which availability is defined. For more information, see Calendar .

Assignment Manager Selection Criteria

In addition to the requirements listed in [Assignment Manager Dependencies](#), the Assignment Manager uses the following criteria to select a qualified resource for a document or task.

Criteria	Description
1. Preferred Resources	The first and foremost criteria the Assignment Manager considers in the assignment process.
2. Territories	Used to retrieve all the qualified resources for the assignment from the selected territories.
3. Resource Availability	After a preferred or qualified resource, based upon territories, is selected, the availability of the resource is considered.

The Effect of Customer Selections

The assigning of ownership and availability is influenced by customer selections. The customer selections are set up within Assignment Manager and consist of

making a selection from the selection criteria. The combination of the criteria selected results in the selection of the qualified resource.

See Also

[Selecting Assignment Criteria](#)

Using Assignment Manager

This topic group provides process-oriented, task-based procedures for using the application to perform essential business tasks.

Assigning Options

Choose one of the following options for assigning tasks:

- [Assigning Unassisted](#)
- [Assigning Assisted](#)
- [Assigning Intelligent](#)
- [Assigning with the Window To Promise](#)
- [Selecting Assignment Criteria](#)

Assigning Unassisted

Use the Unassisted option to assign responsibility to a resource of your choice, without using the criteria set or the features of Oracle Scheduler.

The Gantt chart displays tasks that have already been assigned in green. Move your cursor over a task to view details.

Prerequisites

None

Steps

1. Select the Unassisted option from the Selection Criteria.
2. Make an entry at Resource Partial Name, Resource Type, or Location.
3. Click **Search**.

The Gantt chart for the resource or resources found is displayed.

4. Double-click on the preferred resource.

The selected resource appears below the Gantt chart.

5. Enter the preferred Start Time and End Time.
6. Click **OK** to commit the assignment.
Or click **Cancel** to leave Assignment Manager without changes.

Assigning Assisted

Use the Assisted option to assign responsibility to a resource based upon the selection criteria.

The Assignment Manager always appears with the Assisted option selected and displays a list of qualified resources based upon the selection criteria.

The Gantt chart displays tasks that have already been assigned in blue and plan options in green. Move your cursor over a task to view details.

Prerequisites

None

Steps

1. Select the **Assisted** option from the Selection Criteria.
The calendar for the qualified resource appears.
2. Adjust the Selection Criteria and click **Search** when the Gantt chart is empty.
For more information, see [Selecting your Assignment Criteria](#).
3. Double-click on the resource with the preferred start and end time.
The selection appears below the calendar.
4. Click **OK** to commit the assignment.
Or click **Cancel** to leave Assignment Manager without changes.

Assigning Intelligent

The Intelligent option is only available when Oracle Scheduler is installed. Use the Intelligent option to assign a task to a resource.

The Gantt chart displays resources with costs, tasks that have been assigned in blue, and travel time between tasks. Move your cursor over a task to view details

Prerequisites

You must have Oracle Scheduler installed.

Steps

1. Select the **Intelligent** option from the Selection Criteria.

The Gantt chart for the qualified resource or resources displays a related cost.

2. Adjust the Selection Criteria and click **Search** when the Gantt chart is empty.

For more information, see [Selecting your Assignment Criteria](#).

3. Double-click on the resource with the preferred start and end time.

The selection appears below the calendar.

4. Click **OK** to commit the assignment.

Or click **Cancel** to leave Assignment Manager without changes.

Guidelines

The resource with the lowest cost related to the assignment is in most cases the best option to select. This plan option appears in green on the Gantt chart.

Assigning with the Window To Promise

Use the Window To Promise option to assign a time slot to a customer. It is only available when Oracle Scheduler is installed.

The Window To Promise displays possible time slots to offer to the customer and related cost.

The assignment of the task results in a time slot reserved for a resource. It can later be optimized to another resource.

Prerequisites

You must have Oracle Scheduler installed.

Steps

1. Select the **Window To Promise** option from the Selection Criteria.
Possible time slots with related cost are displayed.
2. Adjust the Selection Criteria and click **Search** when the Gantt chart is empty.
For more information, see [Selecting your Assignment Criteria](#).
3. Select the preferred time slot by checking it.
The selection appears below the calendar.
4. Click **OK** to commit the assignment.
Or click **Cancel** to leave Assignment Manager without changes.

Guidelines

The time slot with the lowest cost related to the assignment is in most cases the best option to offer your customer.

Selecting Assignment Criteria

Use this chart to help you decide which options to choose when setting up assignment criteria. This is done in the Assisted screen of the Assignment Manager. A selection of the following criteria is possible:

Preferred Resources	Territories	Resource Availability	Selection results in:
X			A search for the preferred resource, availability is not taken into account.
	X		A search for a qualified resource in the selected territories, availability is not taken into account.
		X	A search for an available resource, preferred or qualified is not taken into account.
X	X		A search for the preferred resource, availability is not taken into account. When no preferred resource is available, a search for a qualified resource in the selected territories is done, availability is not taken into account.
X		X	A search for a preferred resource, availability is taken into account.
	X	X	A search for a qualified resource in the territories selected, availability is taken into account.
X	X	X	A search for the preferred resource, availability is taken into account. When no preferred resource is available, a search for a qualified resource in the selected territories is done, availability is taken into account.

Understanding Escalation Management

This topic group provides an overview 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.

Overview

Escalations occur in support centers for a wide variety of reasons. An escalation management system allows an organization to identify, track, monitor, and manage situations that require increased awareness and swift action.

Oracle Support's Escalation Management features include:

- Escalation situation tracking information
- Service Request, Task, and Defect linking capability
- Ownership assignment based on escalation territory
- Resolution plan definition with associated tasks and notes
- Automatic notification of escalation progress to identified contacts
- De-escalation and closure
- Automatic notifications of potential escalations, using Oracle Business Rules Monitor

Basic information is captured in an escalation document including the requester, the business situation, the required resolution date, and additional contacts that are involved.

An escalation is managed by creating an escalation document, assigning an escalation owner, defining the actions needed to resolve the escalation, and

communicating the progress. Once a situation is de-escalated, the escalation closure note is captured and a final communication is sent to the contacts involved.

Workflow Notifications

Notifications are an integral part of the Escalation functionality. Oracle Workflow is used to process and deliver the notifications regarding the escalation activity.

Notifications are sent for the following reasons:

- Escalation creation
- Escalation status changes
- Escalation owner assignment and changes
- Escalation level changes
- Escalation target date changes

Notifications are sent to those people (employees or customers) that are identified on the Contacts tab, and for which the Notify checkbox has been checked.

Typical recipients include:

- Owner of the object (Service Request, Task, or Defect) that is being escalated
- HR manager of the owner of the Escalation document
- Owner of the Escalation document

Using Escalation Management

This topic group provides process-oriented, task-based procedures for using the application to perform essential business tasks. See [Overview](#) for an explanation of the Escalation Management features.

The following topics are covered in this section

- [Creating Escalations](#)
- [Managing a Service Request Escalation](#)
- [Managing a Task Escalation](#)
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Creating Escalations

Three object types can be escalated: service requests, tasks, and defects. An escalation is managed by creating an escalation document, assigning an escalation owner, defining the actions needed to resolve the escalation, and communicating the progress. Once a situation is de-escalated, a final communication is sent to the contacts involved.

An escalation is initiated by a person using a service channel (telephone, web, email). An escalation can also be initiated by the system that is based on pre-defined rules that have been established to monitor business situations. (See [Start the Business Rules Monitor](#) in the Implementation Guide for more information on automated escalations.)

To initiate an escalation you must accept a request for an escalation, review the situation, create an escalation document, and notify the involved parties. An escalation request can be initiated on behalf of a customer, an employee, or other involved party.

See also

[Managing a Service Request Escalation](#)

[Managing a Task Escalation](#)

[Managing a Defect Escalation](#)

Managing a Service Request Escalation

A service request is a document that tracks information regarding a customer's product and service problems.

Use this procedure to manage a service request escalation.

Prerequisite

A service request has been entered into the system.

Steps

1. Navigate to **View Service Request** and query the existing service request.
2. Verify that the service request has never been escalated. In the Request Information area of the header, verify that "Never Escalated" appears in the Escalation Level field.

You may have to scroll down in the Request Information header region to see the Escalation Level field.

3. From the Tools menu, choose **Request Escalation**

The Escalations Window appears. The customer and account information fields will automatically be filled out, along with the reference document information (service request).

4. Select a Status
5. Select a Reason
6. Enter a target date
7. Select the escalation level
8. Assign the escalation to yourself or another existing resource using one of the two methods listed:
 - a. Select a resource from the list of values.
 - b. Click **Assign** to choose an escalation owner from the Assignment Manager.

- c. Click **Search**. The resources from the Escalation Territory(s) of the escalated document(s) display. If there are no Escalation Territories set up, then the resources from the Catch All territory display.
- d. Double-click the resource name to select it.
- e. Click **OK**.

9. Enter a situation summary.
10. Enter the name of the customer or employee contact (requester), and check the requester box.

There can be more than one contact, but only one requester.
11. Optionally, enter any additional contact points.
12. Optionally, add more reference documents to the escalation.
13. Save the escalation, and make a note of the displayed escalation number.
14. Optionally, click **Notes** to create a note about the escalation.
15. Optionally, click **Tasks** to create a task to manage the escalation.
16. Close the Escalation window to return to the Service Request screen.

Re-query the service request to view the updated escalation level.

Managing a Task Escalation

A task is a document that tracks work to be done by a support center. Service requests and defects may have associated tasks that define work to be done by a support center. A task can be escalated due to an issue with a service request or defect. A task can also be escalated independently.

Use this procedure to manage a task escalation.

Prerequisite

A task has been created and entered into the system.

Steps

1. Navigate to **Tasks**.
2. Find the task to be escalated.
3. From the Tools menu, choose **Request Escalation**.

The Escalations window appears.

4. Verify that the task has never been escalated.
The escalation level and owner display on the main Task screen.
5. Enter the task number into the Number field in the Reference Documents tab.
6. Select a Status.
7. Select a Reason.
8. Enter a target date.
9. Select the escalation level.
10. Assign the escalation to yourself or another existing resource using one of the two methods listed:
 - a. Select a resource from the list of values.
 - b. Click **Assign** to choose an escalation owner from the Assignment Manager.
Click **Search**. The resources from the Escalation Territory(s) of the escalated document(s) display. If there are no Escalation Territories set up, then the resources from the Catch All territory display.
Select a resource by double-clicking on the resource name.
Click **OK**.
11. Enter a situation summary in the Escalation Summary field.
12. Enter the name of the customer or employee contact (requester), and check the requester box.
There can be more than one contact, but only one requester.
13. Optionally, enter any additional contact points.
14. Save the escalation, and make a note of the displayed escalation number.
Query the escalated task to view the updated escalation level.

Managing a Defect Escalation

A defect is a document which tracks product problems and resolutions. A defect can be escalated without an associated service request. Any employee can escalate a defect.

Use this procedure to manage a defect escalation.

Prerequisite

- A Defect with an open status has been created and entered into the system.
- This defect has not yet been escalated. (You can use the Find window to search for an escalation on a particular document.)

Steps

1. From within the Customer Support Responsibility, choose **Manage Escalations**. The Escalations window appears.
2. Enter the desired information (no information will default into the form).
3. Enter Defect into the Documents field in the Reference Documents tab.
4. Select a Status.
5. Select a Reason.
6. Enter a target date.
7. Select the escalation level.
8. Assign the escalation to yourself or another existing resource using one of the two methods listed:
 - a. Select a resource from the list of values.
 - b. Click **Assign** to choose an escalation owner from the Assignment Manager.
 - c. Click **Search**. The resources from the Escalation Territory(s) of the escalated document(s) display. If there are no Escalation Territories set up, then the resources from the Catch All territory display.
 - d. Select a resource by double-clicking on the resource name.
 - e. Click **OK**.
9. Enter a situation summary in the Escalation Summary field.
10. Enter the defect owner name in the contact field.
11. Save the escalation, and make a note of the displayed escalation number.

Changing the Escalation Level

A notification is sent whenever a document's escalation level is changed.

Closing an Escalation

To close an escalation, change the status to Closed in the escalation document. A notification is sent when an escalation is closed.