

# Oracle® Sales for Communications

Implementation Guide

Release 11i

August 2000

Part No. A86288-01

**ORACLE®**

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- Did you find any errors?
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# Preface

Welcome to the Oracle Sales for Communications, Release 11i.

This Detailed Implementation Guide provides information and instructions about the implementation of the Oracle Sales for Communications application.

This preface explains implementation considerations and processes is organized and introduces other sources of information that can help you.

## Intended Audience

This guide is aimed at the following users:

- Product Implementation team (Oracle and Customer)
- Oracle and Customer Project Managers
- Technical Support Associates
- System Administrators (SAs), Database Administrators (DBAs), and others with similar responsibility.

This guide assumes you have the following prerequisites:

- Understanding of the product implementation processes.
- Knowledge of Oracle Network Logistics operation and services
- Basic understanding of Oracle and Developer/2000
- Understanding of the interface protocol to each of the fulfillment elements (telnet, script)
- Background in SQL, PL/SQL, SQL\* Plus programming

# Structure

This manual contains the following chapters:

- Considerations for planning
- Setting up Oracle Sales for Communications
- Converting and Inputting Existing Data

# Related Documents

For more information, see the following resources:

## URLs

- <http://crm.us.oracle.com>
- <http://products.us.oracle.com>

## Published Resources

- *Aim Documentation*

# Conventions

The following conventions are also used in this manual:

Convention	Meaning
.	Vertical ellipsis points in an example mean that information not directly related to the example has been omitted.
...	Horizontal ellipsis points in statements or commands mean that parts of the statement or command not directly related to the example have been omitted
<b>boldface text</b>	Boldface type in text indicates a term defined in the text, the glossary, or in both locations.
< >	Angle brackets enclose user-supplied names.
[ ]	Brackets enclose optional clauses from which you can choose one or none.

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# **Implementing Oracle Sales for Communications**

## Considerations for Planning an Implementation Project

The following items are part of planning an implementation for Oracle Sales for Communications:

- Overview of Oracle Sales for Communications
- Related Applications
- Required Information

## Overview

Oracle Sales for Communications is Customer and Order Management application designed for the unique needs of telecommunications providers. Major functionality in the application includes:

- Customer and Account Management
- Product Catalog
- Quotes & Orders
- Installed Base.

## **Features**

Oracle Sales for Communications is designed as an integrated application to support the entire telecommunications customer sales cycle. It includes the following major features:

- Ease of customer and account creation through the Customer Response Center
- Multiple accounts and hierarchical accounts
- Rapid creation of new telecommunications products and services through the Product Catalog
- Creation of product bundles, or packages through Bill of Materials
- Integration with Provisioning
- Quote and Order functionality
- Installed Base functionality to view a customer's historical or current product selection.

## **Functions**

Oracle Sales for Communication consists of several major functions described below:

- „ Creating and updating customers and accounts
- „ Creating and updating products
- „ Creating and retrieving Quotes
- „ Creating Orders
- „ Retrieving and modifying information in the Installed Base

## **Related Applications**

Oracle Sales for Communications 11i re-uses some major functionality from numerous Oracle ERP and e-Business applications. Familiarity with these applications will be helpful in implementing Oracle Sales for Communications. These applications are:

- Oracle Inventory
- Oracle Order Capture
- Oracle Order Manager

In addition, Oracle Sales for Communications uses a shared schema for Customer data. Familiarity with any applications which use the 11i Customer Model will aid in the implementation and use of Oracle Sales for Communications.

## Integration with Other Oracle Modules

Oracle Sales for Communications 11i is inherently integrated with some major functionality from numerous Oracle ERP and e-Business applications. Familiarity with these applications will be helpful in implementing Oracle Sales for Communications. These applications are:

Oracle Application	Functionality
Oracle Inventory	Oracle Inventory screens are used to create and update products, including item relationships such as up-sell and cross-sell, prerequisite, etc.
Oracle Bill of Materials	Oracle Bill of Materials screens are used to create and update product bundles.
Oracle Order Capture	Oracle Order Capture APIs and views are used to create and update quotes.
Oracle Order Manager	Oracle Order Manager APIs and views are used to create and update order information. Some Order Manager setup screens are also used. Order Manager workflows are used in conjunctions with Sales for Comms workflows. Shipping charges are accessed via Order Manager.
Oracle TeleSales	Oracle Telesales screens are used to create and update customer and account information.
Oracle Receivables	Oracle Receivables is used to calculate tax on shippable goods.
Oracle Advanced Pricing	Oracle Advanced Pricing is used to create price lists and to assign products to price lists. Also used to create discounts and pricing qualifiers.
Oracle Service Delivery Platform (SDP) - Oracle Provisioning (OP)	SDP-OP workflows are used to activate and de-activate products.
Oracle Service	Oracle Service APIs are used to create and update the Installed Base and to create and update parameters.

In addition, Oracle Sales for Communications uses a shared schema for Customer data. Familiarity with any applications which use the 11i Customer Model will aid in the implementation and use of Oracle Sales for Communications.

## **Required Information**

The following information is required for the implementation of Oracle Sales for Communications:

- Products
- Product Categories
- Product Pricing
- Provisioning requirements
- Tax Information
- Customer Information

## Setting Up Oracle Sales for Communications

The following are items that must be set up during the implementation of Oracle Sales for Communications:

- Define Recurring and Non-Recurring Item Types
- Create Order management Line Transaction Types
- Create Order Management Line Flows
- Set SDP Integration Setting
- Setup Organizations
- Setup Operating Unit organization

## Define Recurring and Non-Recurring Item Types

This is a necessary setup step. Without successful completion of this step, products may not be visible to the Customer Service Representative.

### Steps

1. Navigate to: Product Catalog: Product Catalog Setup: Setup: Inventory: Setup: Items: Item Types (this is in In Oracle Sales for Communications responsibility)
2. Create Non-Recurring and Recurring items. To add these:
  - Click the 'New' icon (green plus sign)
  - Enter the following information:

Code	Meaning	Description Tag	From	To	Enabled
NRI	Non-Recurring		date (required)		Checked
RI	Recurring				

3. Save the records, either by clicking the yellow Save icon or by clicking File: Save.

## **Troubleshooting**

If you are not sure whether the Non-Recurring and Recurring item types have been created, you can perform the following check:

- 1.** Switch to System Administrator responsibility. This is done by:
  - Click File: Switch Responsibility
  - Choose 'System Administrator'
- 2.** Navigate to Profile: System
- 3.** Enter XNC% and click the Find button.
- 4.** Verify that Non-Recurring and Recurring Item Types have been created from the values returned.

## **Create Order Management Line Transaction Types**

Sales for Communications uses three transaction types: ADD, CHANGE, and REMOVE. These transaction types are not seeded in Order Management and, hence, must be added to Order Management before a Sales for Comms quote or order can be taken.

This is a necessary setup step. Without successful completion of this step, quotes and orders cannot be taken in Sales for Comms.

### **Steps**

1. Switch to “Order Management Super User” responsibility.
2. Navigate to Setup: Transaction Types: Define
3. Enter ADD in Transaction type, e
4. Enter Line in Transaction Type Code,
5. Enter Order in Order Category,
6. Save the record, either by clicking the yellow Save icon or by clicking File: Save.
7. Repeat steps 3-6 for Transaction types of CHANGE and REMOVE.

## Create Order Management Line Flows

### Steps:

1. Switch to “Order Management Super User” responsibility, if you are not already there
2. Navigate to: Setup: Transaction Types: Define
3. Click the “Assign Line Flows” button.
4. Enter:

	<b>Line Type</b>	<b>Item Type</b>	<b>Process Name</b>	<b>Start Date</b>
„	ADD	„ (leave blank)	„ Line Flow - Generic	„ (enter a start date)
„	REMOVE	„ (leave blank)	„ Line Flow - Generic	„ (enter a start date)
„	CHANGE	„ (leave blank)	„ Line Flow - Generic	„ (enter a start date)

5. Save the records, either by clicking the yellow Save icon or by clicking File: Save.

## **Set SDP Integration Setting**

Oracle Sales for Communications includes functionality from another Oracle application Oracle Service Delivery Platform-Oracle Provisioning (SDP:OP). There is a profile option named XNC:SDP Integration. The default setting for this profile is Yes. If, for some reason, SDP Integration is not to be used, this setting can be changed to No. **This is *not* a mandatory step.**

### **Steps**

1. Switch to System Administrator responsibility. (This is done by clicking File: Switch Responsibility. Then choose 'System Administrator.')
2. Navigate to Profile: System
3. Enter XNC% and click the Find button.
4. Type "No" in the Site Value for XNC: SDP Integration  
(Note: although there is a List of Values, it may or may not include "No." Since it is a user-enterable field, you can simply type "No" if desired and it will be accepted).
5. Save the record, either by clicking the yellow Save icon or by clicking File: Save.

## Setup Organizations

Organizations must be defined in Oracle Sales for Communications.

### Steps

1. Login to Oracle Sales for Communications by doing the following:
  - Click, File: Switch Responsibility
  - Choose 'Oracle Sales for Communications'
2. Navigate to Product Catalog: Product Catalog Setup: Setup: Inventory Setup: Organizations: Organizations.
3. Type "%" in the Name field
4. Click, Find  
All defined Organizations will appear.
5. Click the "New" button to define an organization.
6. Enter the Name of the Organization in the Name field
7. Enter a start date for the new Organization in the Dates field, (the default is the system date).
8. Save the record, either by clicking the yellow Save icon or by clicking File: Save.

## **Setup Operating Unit organization**

Product and Services are defined or created for certain organizations. The tree widget, used to display products and services for addition to Quotes and Orders, will initially display Product & Services for its default organization. Therefore, you will likely want to ensure that these organizations are the same.

### **Troubleshooting**

1. Login to System Administrator responsibility.
2. Navigate to Profile: System.
3. In the Profile field, enter MO%. Click the Find button.
4. For the Profile MO: Operating Unit (note that there is a space after the colon), the value in Site should be the organization you would like to use as default.

# Converting and Inputting Existing Data

## Defining Products

Products and services are what a communications company offers to its customers. For years, Regional Bell Operating Companies have defined their products by Universal Service Order Codes (USOCs). Keep in mind that any product a customer can order must be defined regardless of whether it is free. There are several steps involved in Oracle Sales for Communications to create products and services.

Another important consideration is whether the items are **Provisionable** or **Shippable**. **Provisionable** implies that some type of network equipment is required to physically activate the service. This might include circuit assignment or reservation of network elements. **Shippable** indicates a hard physical good. Examples of shippable goods are cellular phones and pagers.

## **Create Inventory Items**

An item is simply a product or service that a communications wishes to make available for use or consumption. Example of a communications company's items could include: Monthly Telephone Service, Monthly Unlimited E-mail service, Installation Charges, Wireless Telephones, etc.

### **Steps:**

1. Log in to Oracle Sales for Communications responsibility
2. Select an Organization if you have not already done so
3. Navigate to Product Catalog: Product Catalog Setup: Setup: Inventory: Item Setup: Master Items
4. Select an Organization if you have not already done so. This will bring up the Master item screen with several tabs. Required Fields are highlighted in a pale yellow color.
5. Complete the following fields:
  - **Item** - Item is the Product or Service (Note: there is a limit of 25 characters in the Item field. If you are using USOCs or a short product code, you may want to use the Item field).
  - **Description** - (Note: this is a longer field and can be used to provide more description about the product or service.

6. Setup Main tab

- „ **Primary Unit of Measure** - Normally this will be 'Each.'
- „ **User Item Type** - This is not a mandatory field, but it is a very important field! In Sales for Comms, a profile must be created so that there is a 'Recurring' user item type. Assuming this profile has been created correctly, 'Recurring' will be in the User Item Type LOV. **You must select 'Recurring' for recurring items (these are items that are neither stockable nor shippable) or the item will not appear for addition to Quotes and Orders.**

7. Setup Inventory tab

- „ **Inventory Item** - When Inventory Item is checked, Stockable and Transactable will automatically be checked. This is fine for shippable goods. **For provisionable goods, uncheck Stockable.** This will ensure that products will be correctly defined for customers who are also using Oracle Inventory.
- „ **Reservable** - This must be checked.

**8. Setup Costing tab**

**Cost of goods Sold Account** - This field should be entered if you are using Oracle financial applications.

**9. Setup Purchasing tab**

- **Receipt Required** Set this field to No
- **RFQ Required** Set this field to No
- **Taxable** Oracle Sales for Communications is integrated with the taxing capability inherent in Oracle Receivables. Set this field to Yes if you want to use the Tax features; set this field to No if you do not.
- **Allow Description Update** Normally you will want this box to be checked.
- **Expense Account** This field should be entered if you are using Oracle financials.

**10. Move arrow to the right for more tab options. Select Order Management.**

- Customer Ordered = Checked
- Activation Required = Checked (note: if this were a non-recurring or a shippable item, Activation Required would not be checked. Instead, Shippable would be checked)

**11. Setup Invoicing tab**

- „ A Sales Account is required. For testing purposes, use the default or pick from the list of values.
- „ Invoiceable = Unchecked (this is the default)
- „ Invoice Enabled = Unchecked (this is the default)

**12. Setup Service Tab**

Serviceable Product = Checked (**this step is critical** for all products & services – shippable or provisionable or even collateral. Every product in Sales for Comms must be marked a Serviceable Product)

**13. Save the item**

### **Create Bill of Materials (BOM )**

Prerequisite: Inventory Items must be created

### **Create Item Action Parameters**

- „ Prerequisite: Inventory Items must be created
- „ Create Item Sub-Action Types

## Create Item Restrictions

**Note:** Item Restrictions are intended to capture constraints on certain items. As an example, some items may only be offered to customers served by a certain type of network switch. Sales for Comms only includes screens to capture Item Restrictions. *However, an additional consulting effort would be required to enforce any of the Item Restrictions.* Hence, Item Restrictions will only be tested to ensure that fields are enterable.

Create Lookups for Item Restrictions

### **Create Billing System Map**

Prerequisite: Inventory Items must be created

- Setup Billing System Procedure
- Setup Billing System Price List

### **Create Price Lists**

- Prerequisite: Inventory Items must be created
- Setup Item Price List & Price List Lines
- Setup Pricing Qualifiers
- Create Pricing Modifiers (Discounts)

### **Create Categories**

- „ Prerequisite: Inventory Items and Price Lists must already have been created.
- „ Setup New Category

**Note:** it is not possible to simply rename a category. The existing category must be end-dated and a new category created. Then, all price lists for the category must be added.

- „ Assign Price Lists to a Category