Oracle® Sales for Communications

Concepts and Procedures

Release 11*i*

October 2000

Part No. A87387_01

ORACLE®

Oracle Sales for Communications Concepts and Procedures, Release 11*i*

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Contents

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Preface

Welcome to the Oracle Sales for Communications 11.5.2.

This Detailed Implementation Guide provides information and instructions about the implementation of the Oracle Network Logistics 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:

- Customer Service Representatives (CSRs)
- System Administrators (SAs), Database Administrators (DBAs), and others with similar responsibility).

This guide assumes you have the following prerequisites:

- Understanding of the company business processes.
- Knowledge of products and services as defined by your marketing policies.
- Basic understanding of Oracle, including Navigation, Wildcard character (%), and Organizations.

Knowledge of Developer 2000 and/or a background in SQL, PL/SQL, or SQL*Plus is helpful but not required.

Structure

This manual contains the following chapters:

"Understanding Sales for Communications" provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application's relationships to other Oracle or third-party applications.

"Using Sales for Communications" provides process-oriented, task-based procedures for using the application to perform essential business tasks.

"Administering Sales for Communications" provides 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 Sales for Communications Technical Reference Manual*

- *Oracle Sales for Communications SRD*

- *Oracle Sales for Communications SOD*

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
boldface text	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.

Understanding Oracle Sales for Communications

Introduction

Sales for Communications supports the business processes involved during the sales cycle of a communications service provider. Sales for Communications is integrated with Oracle's ERP and CRM applications and also supports integration with external systems. This integration provides extensive functionality to manage the business activities involved during the sales process.

The eBusiness Center component provides the ability to create and maintain customer and account profiles.

Sales for Communications includes an intuitive Product Catalog component for setup and maintenance of products and services. The Product Catalog also supports the business rules associated with selling, pricing, and provisioning the product offerings.

Sales for Communications provides comprehensive order capture capabilities for creating quotes and orders based on products and rules configured in the Product Catalog as well as the products and services the customer already has (the Installed Base). Sales for Communications provides Order Management functionality for managing the business processes and rules associated with each order/order line as it moves through its life cycle, managing interactions and dependencies between multiple delivery mechanisms and external systems.

Sales for Communications is integrated with Oracle's Service Delivery Platform (SDP) for provisioning customer-ordered products and services. Standard Application Programming Interfaces (APIs) are available to provide external billing systems with information on products and services sold through Sales for Communications.

Business Process Overview

There are two primary business processes addressed in the Oracle Sales for Communications application.

- Product Catalog.

- Call Center

Product Catalog

The Product Catalog is the concept of all the products and services that are available to customers.   Products and services are first defined as *items*. In the communications industry, it is common to separate products into two main types:

- Recurring (Subscription)

- Non-recurring (One-time)

An example of a recurring product or service is one which is billed periodically, such as monthly. Monthly wireless phone service is an example of a recurring service. Installation charges are an example of a non-recurring product. The installation charge only occurs when the product is installed; it is not provided nor billed for repetitively.

Another important distinction in the telecommunications marketplace is the distinction between 'hard goods' or physical items and services which need to be activated or *provisioned*. Consider a communications provider who sells wireless phones as well as wireless phone service. The wireless phone itself, the physical handset, is a hard good. Physical goods are referred to in Oracle Sales for Communications as *shippable* items. The wireless phone service is not something which is shipped; rather, it is provisioned by interaction with additional systems, such as phone number inventory systems and switching systems. Services which require provisioning are referred to as *provisionable* or as requiring *activation* in Oracle Sales for Communications.

After the items are created, they can be added to *price lists*. This allows the same item to be priced different ways. For example, a business may sell products to its business customers at one price but sell the same products to its residential customers at a different price. *Price lists* are used to support this requirement. Once a price list is defined, an item (product or service) can be added to the price list, and the item can be given a *price* on that price list. Each price list is in a single *currency*; products priced in different currencies will require a different price list for each currency.
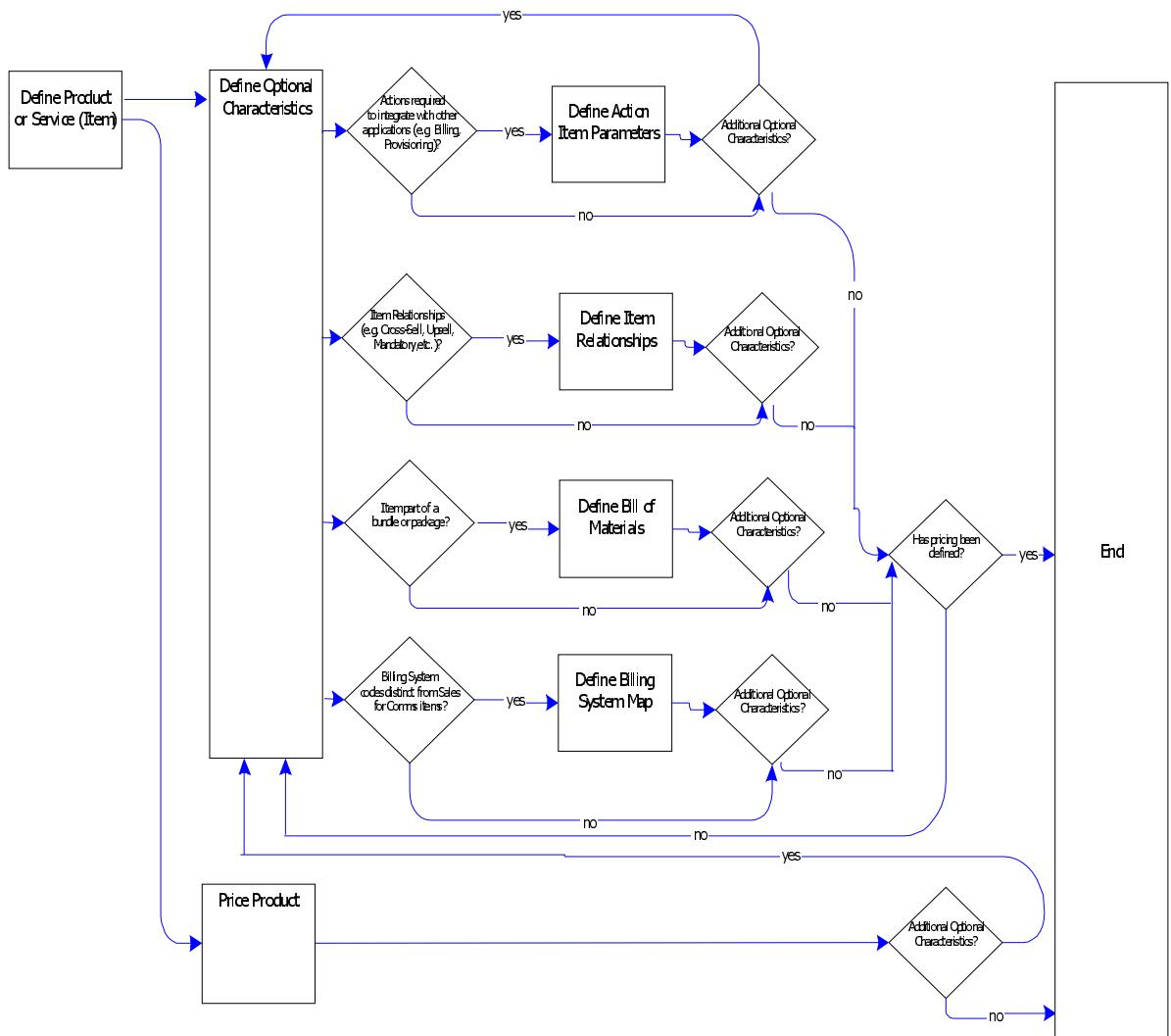
Bill of Materials

Oracle uses the *Bill of Materials* construct to group individual items into packages. This allows you to create a new item (the package) which is actually comprised of one or more items. In Oracle Sales for Communications, only recurring items should be placed in the same Bill of Materials.

Item Action Parameters

```
After an item is defined, Item Action Parameters can be defined for the Item.
Item Action Parameters are a way to specify values and fields related to the
item.  The value may be user defined (e.g. a customer's password hint) or
provided from another application (e.g. circuit i.d. or a telephone number
provided by a telephone number inventory system).
```

Item Relationships

Oracle Sales for Communications allows items to be related to one another. Cross-sell, up-sell, and mandatory charge are three of the 14 seeded *item relationships.*

Billing System Map

The Billing System Map in Oracle Sales for Communications allows you to map items in Sales for Communications to billing system codes that may be used by 3rd party or legacy billing systems.

Call Center

Oracle Sales for Communications is designed primarily as a Call Center application.

The Call Center functionality:

- Creating or updated customer and account information
- Customer and Account Management is handled in Oracle Sales for Communications eBusiness Center. The eBusiness Center allows you to create a customer or contact. The eBusiness Center includes fields for customer name, address, and telephone number. Since customers can have more than one account, accounts can be defined in the eBusiness Center.
- Adding new products or services (Quotes and Orders) to a customer's account
- Change or remove existing products and services from the customer's Installed Base
- Place an order for a previously saved Quote
- Check the status of an existing Order

ISSUES

Sales for Communications relies heavily on TeleSales functionality.

> **Note:** TeleSales code is not yet complete and Oracle TeleSales/Sales for Communications integration has not begun.
>
> Once TeleSales integration is complete, the navigation steps listed for Quotes and Orders will change significantly from what is currently included in this document. Also, some of the Customer and Account Management functionality will change.
>
> This document must be thoroughly reviewed and updated following TeleSales integration.

General Concepts

Product Catalog

Concepts
The following are Product Catalog concepts:

- Item
- Inventory Item Type
- Serviceable
- Activation Required

Item
An Item represents the actual product or service to be supplied to the customers. Items can include physical goods (e.g. cellular phones, pagers, etc.) or provisionable goods (e.g. monthly telephone service). It important to note that, in Oracle Sales for Communications, an Item does not inherently contain a price. Rather, prices are *associated* with an Item. The benefit of this is that an Item need only be created once, yet it can be priced in different ways for different types of customers. This is valuable for communications companies who often price their products differently for different types of customers, such as Business and Residential.

Inventory Item Type

Inventory Item Type is a field in the Main tab of the Inventory Master Item form. 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, 'Recurring' will be in the User Item Type LOV.

Note: You <u>must</u> select 'Recurring' for recurring items (these are items that are neither stockable nor shippable) or the item will not appear in the tree.

If the User Item Type is blank and, later in the Order Management tab, Shippable is checked, then the item will appear in the tree. But, if the User Item type is blank and, on the Order Management tab, Activation is required, then the item will not appear in the tree. The combination of Item Type and the information in the Order Management tab is very important.

An item must be either Shippable, Stockable, or have a Recurring item type to appear in the tree. However, an item can be created as neither Shippable, Stockable, or with a Recurring item type. These items will not appear in the tree, but they can be *related items* to other items which do appear in the tree. As an example, a non-shippable, non-stockable, non-recurring installation charge can be a mandatory related item to an item which does appear in the tree.

Serviceable

Serviceable Product is a field in the Service tab of the Inventory Master Item form. Every product in Sales for Comms must be marked a Serviceable Product.

Activation Required

This checkbox on the Order Management tab of the Inventory Master Item is used to indicate that the Item is provisionable. Only check this field for provisionable items

Product Catalog Navigator

Product Catalog is used to setup products, associate products, create prices and categories. There are two ways to achieve this:

- Create Inventory Master Item

- Create BOM

Create Inventory Master Item (Product or Service)

(This space held for input of updated information)

Steps:

1. Goto *Product Catalog Navigator Tree*

2. There are two ways to create a new Item. First, you can highlight a selection in the Product Catalog Navigator, Right mouse click, and select New. This will bring up the Master Item screen. Another way to create an item is to navigate to Inventory Product Catalog Setup: Setup: Inventory: Item Setup: Master Items).

3. Fill out the following fields:

   - **Item**

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> **Note:** There is a limit of 25 characters in the Item field. additional characters are truncated.

   - **Description**

(This space held for input of updated information)

4. Goto *Main* tab

Fill out following values:

- **Primary Unit of Measure**
- **User Item Type**.

Note: 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, '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 in the tree.**

If the User Item Type is blank and, later in the Order Management tab, Shippable is checked, then the item will appear in the tree. But, if the User Item type is blank and, on the Order Management tab, Activation is required, then the item will not appear in the tree. The combination of Item Type and the information in the Order Management tab is very important.

An item must be either Shippable, Stockable, or have a Recurring item type to appear in the tree. However, an item can be created as neither Shippable, Stockable, or with a Recurring item type. These items will not appear in the tree, but they can be *related items* to other items which do appear in the tree. As an example, a non-shippable, non-stockable, non-recurring installation charge can be a mandatory related item to an item which does appear in the tree.

5. Goto *Inventory* tab

Fill out following values:

- **Inventory Item.** Inventory Item must be checked.

Note: When Inventory Item is checked, Stockable and Transactable will automatically by checked. This is fine for shippable goods. **For provisionable goods, uncheck Stockable** if you are using Oracle Inventory.

---

6. Goto *BOM* tab

   Check **BOM** if you want the ability to create a BOM for this item

7. Goto *Costing* tab

   Complete any mandatory fields.

8. Goto *Purchasing* tab

   Complete any mandatory fields.

9. Goto *Receiving* tab

   Complete any mandatory fields.

10. Goto *Physical Attributes* tab

    Complete any mandatory fields.

11. Goto *General Planning* tab

    Complete any mandatory fields.

12. Arrow to the **right** for more tab options.

13. Select Order Management.

    - **Customer Ordered** = Checked

      Note: This step is critical. If Customer Ordered is not checked, the item will not appear for selection in price lists.)

    - **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)

      ---

14. Goto *Invoicing* tab

    Complete Sales Account information.

15. Goto *Service* Tab

- **Serviceable Product** = Checked

> **Note:** This step is critical for all products and services – shippable or provisionable or even collateral. Every product in Sales for Comms must be marked a Serviceable Product

16. Save the item

After selecting 'File: Save and Proceed' from the toolbar menu, or by clicking the yellow Save icon in the iconic toolbar.

Create Bill of Materials (BOM)

Oracle Sales for Communications uses the Bill of Materials (BOM) concept to create bundles or packages comprised of one or more Items.

For items that will have related items such as installation charges, the next step in the test plan is to **put the item into a BOM**.

> **Note:** Items without mandatory related items need not be placed in a BOM

Steps:

1. Goto Product Catalog Navigator

2. Select it to *expand the tree* in the desired item

> **Note:** Look in *'Standard' BOM type* for desired item (see note in step 3)

3. Select *Bill of Materials* from the TOOLS menu.

> **Note:** Choosing **Bill of Materials from the Tools menu,** and querying for the desired item is a <u>substitute for steps 2-3</u> (above). A major benefit of using the Tools menu is that you can search for the item you want, rather than having to navigate through the tree.

Use the List of Values to find a BOM.

4. Click in *Item Seq* field. It will auto-populate the sequence.

5. Add all items to the BOM.

> **Note:** Note: only recurring items should be placed in the same BOM.

6. Accept the default values or change any values (like Date Effectivity).

Item Restrictions

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. *Item Restrictions are not enforced in the base Oracle Sales for Communications product, although this can be accomplished by consultants at implementation.*

Create Lookups

Three item restrictions fields require Lookups to be created so that values will be returned from the LOVs:

- XNC_ADAPTER_TYPE
- XNC_FE_TYPE_NAME
- XNC_SW_GENERIC

Steps:

1. Navigate to: Setup

2. Define Lookups to gain System Administrator privileges

3. Enter a query for the XNC_ADAPTER_TYPE, XNC_FE_TYPE_NAME, or XNC_SW_GENERIC)

4. Keep default value (User) for Access Level radio button

> **Note:** Extensible means that the lookup is seeded in the product

5. Enter values for the mandatory fields of Code and Meaning.

   The value in 'Meaning' is the value that will appear in the LOV. Leave Tag blank; it is not required.

6. Save.

Setup Item Restrictions

Perform the following steps to setup Item Restrictions:

1. Navigate to: Product Catalog: Product Catalog Setup: Setup: Item Restrictions

2. Verify that the correct organization is displayed.

   If necessary, change the organization by clicking from the menu by performing the following steps

   - **View** - Query by Example:

   - Enter (here enter a different organization if you do not want to accept the default.

   - Click: View: Query by Example: Run.

3. Select the product for which you want to set Item Restrictions.

   You can either use the LOV, or you can View. Perform the following steps:

   - Query by Example:

   - Enter (enter the product name or portion of the name plus the % wildcard character).

   - Click: View: Query by Example: Run.

4. Select values from the LOVs for:

   - Element Name

   - Switch Generic

   - Adapter type

- Description
- Start Date

Expected Result:

You should be able to enter values using the LOVs. You should be able to save the records. Because Item Restrictions are not enforced, there is no other expected result.

Billing System Map

Billing System Map is a method to integrate Oracle Sales for Communications with third party or legacy billing systems. It is likely that these billing systems will utilize a different product catalog from Oracle Sales for Communications' product catalog.

Bill System Map is a way to associate the billing codes from Oracle Sales for Communications to the billing codes in legacy and third party billing systems.

Steps:

1. Navigate to: Product Catalog: Product Catalog Setup: Setup: Billing System Map

2. Select values for the following:

- Billing System Name (note: this is an LOV, but it is not populated through Setup, Lookups. Rather, simply type in a Billing System Name, choose a Billing System Usage Type, enter a Billing System Reference Code, and save the record. This will put the Billing System Name in the LOV).

- Billing System Usage Types

- Billing System Reference Codes.

- Combination of Billing System Price List & Item Name (Note: the LOV for price list returns not only the price list, but the combination of price list and Item Name. There is no separate LOV for Item Name. An enhancement has been logged, requesting a separate LOV in the future).

Item Action Parameters

Item Action Parameters specify the required data or actions based upon the combination of an Item (product) and an action + sub-action. Actions include Add, Change, or Remove. Sub-actions include Provisioning, Billing Post Billing, Post Provisioning, Pre Order, Provisioning, Reserve, Resource Date, and Test.

As an example, when a customer requests a change of billing media (say from paper bill to receiving their bills on cd), there is no reason to notify the provisioning applications of this change. Likewise, other actions necessitate communications with provisioning applications but not billing systems.

Item Action Parameters allow for the creation of specific actions or the completion of certain data based upon the item added, changed, or removed.

Steps:

1. Navigate to Product Catalog: Product Catalog Setup: Setup: Item Action Parameters. Action Parameters form will show up

   > **Note:** An alternative is to navigate to Product Catalog: Product Catalog Setup: Product Catalog Setup Navigator. Then, click 'Tools' on the menu bar, and select Item Action Parameters)..

2. Find the **item** for which you want to create or modify Item Action Parameters

3. Select the **Action Type** (Add, Change, or Remove)

4. Select **Sub Action Type** (Provisioning, Billing, Post Billing, Post Provisioning, Pre-Order, Provisioning, Reserve, Resource Date, and Test)

5. Input an **Action Name**

6. Input an **Action Description.**
   This is a free-text field.

7. Input a **Result Procedure.**
   This is a free-text field.

   > **Note: Synchronous** indicates that some feedback or result is
   > required. **Asynchronous** indicates that there is no need to wait for
   > feedback from any auxiliary systems or workflows. Check
   > **Synchronous** checkbox if the Item Action Parameter is
   > synchronous.
   >
   > The synchronous checkbox applies to all the Parameters that will
   > be defined below.

8. Add the following **parameters** in the *Main* tab **s:**

   - Sequence
   - Parameter Name
   - Description
   - Default Value
   - Display checkbox
   - Mandatory checkbox
   - Sys Defined checkbox

9. Accept the default start date or enter a different date in the *Effectivity* tab

10. Enter an end date as needed.

Item Pricing

Oracle Sales for Communications uses the concept of Price Lists to price products. After an item is created as an Inventory Master Item, it can then be added to a Price List and be given a certain price. Note that an active product can only have one price on a given Price List.

Setting up Item Pricing consists of performing the following:

- Setup Item Price List & List Lines
- Setup Price Qualifiers
- Setuo Discounts

Setup Item Price List & Price List Lines

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Steps:

1. Navigate to: Product Catalog: Setup: Pricing: Pricing Setup: Price Lists: Price List Setup

2. Enter a name for the new price list in **Name** field.

3. Enter a description in **Description** field.

4. Enter **Effective Dates** and **Comments** as desired.

5. Do the following in *List Lines* tab:

    - In **Product Context** field, select 'Item' from LOV. (This will automatically populate two other fields: Line Type which will be automatically populated with 'Price List Line,' and Application Method which will automatically be populated with 'Unit Price').

    - In **Product Attribute** field, select 'Item Number' from LOV.

    - In **Product Value** field, select the item name

    - In **UOM** field, select from the LOV (e.g. Ea)

    - **Primary UOM** field is not required.

    - In **Value** field, enter the charge or price for the item.

    - In the **Dynamic Formula** and **Static Formula** fields, enter as necessary.

    - In the appropriate fields, modify the start date and end date as desired.

6. Save the record.

Setup Pricing Qualifiers

The following are components of Pricing Qualifiers

- Qualifier Context

- Qualifier Attributes

- Qualifier Group

- Qualifier

Qualifier Context

Qualifier Context is a structure defining a hierarchy of certain qualifier attributes like class code or site i.d. for a customer

Qualifier Attributes

Qualifier Attributes are user-definable values, used to determine whether an order is eligible for a particular benefit. These are values in a qualifier context.

Qualifier Group

Qualifier Group is a grouping of multiple conditions to be assigned to a single benefit.

For example, if you wanted to give a 25 % discount where 'Customer' is of class 'GOLD' and 'Order Amount' > $20,000, you could define a Qualifier Group with attributes of ID and Name.

Qualifier

Each condition belonging to a Qualifier Group will be a qualifier. Qualifiers determine WHO is eligible for a Price or Benefit.

Qualifier will have a context, an Attribute, an Operator, a Value From, a Value To,start_date_active and an end_date_active.

Steps:

1. Goto either: Product Catalog: Product Catalog Setup: Setup: Pricing: Qualifier Setup, or navigating to:
   Product Catalog: Product Catalog Setup: Setup: Pricing

2. Create a Qualifier Group: In Name field, enter Qualifier Name.

3. In Description field, enter a description for the Qualifier Group.

4. In Context field, enter a Context. Qualifier Contexts are flex-fields. Contexts might include:

   - Customer
   - Client
   - Global Data Elements
   - Geography
   - Modifier Lists
   - Order
   - Segments
   - Terms
   - Territories
   - Territory
   - Volume

5. In Attribute field, enter an attribute.

   > **Note:** Attributes are flexfields.

6. Select an Operator. Operators can include: '=,' 'BETWEEN,' and 'Not =.'

7. Select 'Value From.'

8. Save the record

.Setup Discounts

Create a discount using Pricing Modifiers.

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Steps:

1. Identify the product you want to discount

2. Navigate to: Pricing: Modifiers: Modifier Setup.

3. In Product Attribute field, select 'Item Number'

4. In Attribute Value field, enter the item name

5. Ensure that all mandatory fields are entered.

6. Save the record.

Item Relationships

Setup Item Relationship

Items can be related to one another.

Steps:

1. Navigate to Product Catalog: Product Catalog Setup: Inventory: Item Setup: Item Relationships. A 'Find' window will appear. Unless you wish to find an existing Item Relationship, close this 'Find' window.

2. In the 'From' field, either enter the Item for which you wish to create a relationship or select the Item using the List of Values.

3. In the 'To' field, either enter the second Item in the relationship or select the Item using the List of Values.

4. In the 'Type' field, select the Relationship Type. Relationship Types include:

   - Related
   - Substitute
   - Cross-Sell
   - Up-Sell
   - Service
   - Pre-requisite
   - Collateral
   - Superseded
   - Complimentary
   - Impact
   - Conflict
   - Mandatory Charge
   - Optional Charge
   - Promotional Upgrade

5. Check the 'Reciprocal' checkbox if the Relationship is reciprocal. (Example, if you have two items which are substitutes for one another, you may wish to create one reciprocal relationship).

6. Save the record.

Setup Categories and Prices

Oracle Sales for Communications offers a unique way for CSRs to identify products and services and add them to a customer's quote or order. This is through means of the Product Catalog Navigator. The Product Catalog Navigator presents products in a hierarchical tree structure. This tree can be collapsed or expanded to assist in navigation.

The Product Catalog Navigator allows you to create categories which are meaningful to your business. Examples of categories could include Business or Residential, or Wireline, Wireless, and Cable. There are no restrictions on the kind of categories that can be created.

After these categories are created, you can assign Price Lists to these categories. When the CSR accesses the Product Catalog Navigator, he/she will then be able to select a category, select a Price List which is associated with that category, and then select any product which is assigned to the Price List.

Setup New Category
Steps:

1. Navigate to: Product Catalog: Product Catalog Setup: Product Catalog Setup Navigator

2. Change the filter to **Categories & Prices** or
    Click the **Categories & Prices** icon

3. Click **Maintain Categories/Price Lists** button.

4. Enter the name for the new category.

5. In **Effective Date** field, keep the default effect date, or
    Enter the date you want the category to become effective.

    > **Note:** Backdating is permitted

6. In **Effective to** field, either enter an end date, or
    Leave blank.

7. Enter a description for the category in **Description** field.

8. Save

To see all existing categories from the **View** menu select **Find All**.

Add Category to Tree

After a category has been created, it must be added as a 'Node' to the Product Catalog Navigator. This step cannot be omitted or the Category will not appear in the Product Catalog Navigator

Steps:

1. Navigate to Product Catalog: Product Catalog Setup: Product Catalog Navigator

2. Select **Categories and Prices** icon

3. Click on **Add Node** button.
    New Node screen will appear.

4. Select the category you want to add to the tree from the list of values. This will add the category to the tree.

> **Note:** The tree may not automatically refresh. Collapse and expand the Product Setup Navigator tree to verify that the category has been added to the tree.

Assign Price Lists to a Category

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Steps:

1. Navigate to Product Catalog: Product Catalog Setup: Product Catalog Setup Navigator

2. Change the filter to **Categories & Prices**, or
    Click the **Categories & Prices** icon

3. Select the category to which you want to add a Price List

4. Click the **Add Node** button

5. Select **Price List** for the **Node Type** radio button,

6. In the **Name** field use the LOV to find the Price List you want to add to the Category, or
    Query the Price List you want to add.

7. Select a **start date** and **end date** (if needed).

8. Click **OK**

9. Verify that the Price List appears under the category in the tree.
You may need to collapse the tree and then expand it to refresh. (i.e. click the minus icon to the left of Catalog Setup in the tree. Click again to expand).

> **Note:** You will only see the Price List, not any of the Price List Lines.

End-Date a Category

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Steps:

1. Click on (highlight) the **Category** you wish to end-date.

2. Click the Properties button.
This will launch the **Node Type** window.
The Name field should be populated with the Category you have selected.

3. Click in the Effective To field.

4. Click the LOV ellipsis.

5. Select the current date from the calendar widget.

6. Click **OK**.

7. Refresh the Product Catalog Navigator tree (i.e. click the minus icon to the left of Catalog Setup in the tree. Click again to expand).

8. Verify that the category has been end-dated.
You should see a red X, rather than a folder icon, to the left of the Category name. This indicates that it has been end-dated.

Product Catalog Navigator Form

'View By' Categorization

The Product Catalog Navigator tree includes a 'View by' filter. You can view by:

- BOM Type
- Item Type
- Catalog Group
- Status

.Expanding Product Catalog Tree

If there is a '+' sign next to a category or price list in the tree, that item can be further expanded. To expand an item, highlight the category or price list and click the '+' sign to the left of the category or price list.

Customer and Account Management Scenarios

Customer Management

Contact Types

There are three contact types:

- Person
- Organization
- Relationship

Contact type Person

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Steps:

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Contact type Organization

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Steps:

1. Navigate to the eBusiness Center screen

2. Click the **New** button.
    This should launch a pop-up window.

3. Choose **Organization** from the LOV for Caller Type (other options may be Person, Organization, Group, Caller)

4. Complete required **Name** and **Address** fields.

5. Save the record

Contact type Relationship

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Steps:

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Account Management

Basic

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Steps:

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New Account

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Steps:

1. Navigate to Customer Management: eBusiness Center

2. Create New Customer

3. Select the *Accounts* tab

4. Click the **New Accounts** button

5. Enter an **Account Name** (if needed).

6. Accept the default **Account Activation Date**, or
   Enter a different date.

7. Save

> **Note:** A customer can have more than one account.

Account Status
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Account Attributes

Established Date	Account Status
Activation Date	Termination Date
Category Code {Financial, Health, Telecom, …}	Suspension Date
	Subcategory Code
Current Balance	Payment Term
Reference	Deposit Method
Write-off Amount	Write-off Payment amount
Tax Code	Tax Rounding Rule
Primary Sales Rep	Sales Channel Code

Credit
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Billing Preferences
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Roles
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Suspensions
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Relationships - Parent Account
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Relationships - Recursive

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Searching Accounts

Search for Customer by Account Number

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Steps:

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Search for Customer by Name

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Steps:

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Modify Account Information

To modify account information, access the account, type in the new information. Save the record either by 'File: Save and Proceed' or by clicking the yellow Save icon.

Steps:

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Disconnect Account

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> **Note:** To disconnect an account, you will have to disconnect each product or service on the account separately.

Steps:

1. Access customer account from eBusiness Center.

2. Goto the Installed Base.

3. Select s product 'a' (the first product listed) for that account.

4. Click the **Remove** button.

5. Continue with product 'b' and repeats steps 4-5 for every product until product 'n' (the last product active on the account or telephone number).

6. Clicks the 'Order Workbench' button.
This will pop us the order, populated with cancel orders for every product on the customer's account or telephone number.

7. For every order line, click the *Provisioning* tab and inputs the date the customer wants the service de-activated.

8. When this is complete for all products to be canceled, click the 'Book Order' button.

Order Capture and Order Management Scenarios

Order Capture Forms

Product Catalog icon
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Product Details window
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Installed Base icon
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Installed Base Details window
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Orders icon
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Order Details window
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Quotes icon
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Quote Details window

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Order Capture Customer Information block

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Workbench Button

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Product Details window

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Order Capture Customer Information block

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Workbench Button

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Order Manager Setup

The following are setup in Order Management:

- Transaction types
- Line flows

Transaction Types

Sales for Communications uses three transaction types:

- ADD

- CHANGE

- 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. Navigate to Setup: Transaction Types: Define

> **Note:** You may need Order Management or System Administrator privileges

2. Input Transaction type = ADD

3. Input Transaction Type Code = Line

4. Order Category = Order

5. Save the record

6. Repeat steps 2-5 for Transaction types of **CHANGE** and **REMOVE**.

7. Close window.

Line Flows

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Steps:

1. Navigate to: Setup: Transaction Types: Define

> **Note:** You may need Order Management or System Administrator privileges

2. Click the **Assign Line Flows** button.

3. Enter:

Line Type	Item Type	Process Name	Start Date
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)

4. Save the records.

Order Capture / Order Management Workflow

Workflows

Workflows are executed when Quotes and Orders are created.

Workflow for Shippable Items:

PRODUCT CATALOG / INSTALLED BASE ⇒ QUOTE ⇒ ENTER ⇒ BOOK ⇒ SCHEDULLED ⇒ SHIPPABLE ⇒ FULLFILMENT ⇒ INSTALLED BASE INTERFACE ⇒ CLOSE

Workflow for Serviceable Items:

For non-shippable items Order Management will have a different workflow, it will not invoke Shipping application. Everything is based on the Shippable flag in Inventory.

PRODUCT CATALOG / INSTALLED BASE $\Rightarrow$ QUOTE $\Rightarrow$ ENTER $\Rightarrow$ BOOK $\Rightarrow$ SCHEDULLED $\Rightarrow$ FULLFILMENT $\Rightarrow$ INSTALLED BASE INTERFACE $\Rightarrow$ RESERVE RESOURCES $\Rightarrow$ SDP INTEGRATION $\Rightarrow$ CHECK SDP $\Rightarrow$ BILLING $\Rightarrow$ CLOSED

Synchronous / Asynchronous Item Action Parameters:

When you go into Order Workbench, it must retrieve all the parameters that have synchronous flag set and let the CSR enter the values.

Quotes

Create a Quote
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Steps:

1. Navigate to Order Management: Order Capture Navigator

2. Find the customer

3. Goto **Product Catalog Navigator** tree

4. Expand **Categories & Prices**

5. Find the product in which the customer is interested

6. Click **Add To Order** for as many product as customer works

7. Click on **Workbench** on the customer contact information screen.
    This will bring information about Quotes and Lines

    > **Note:**   You must capture required item action parameters

8. Click the **Save Quote** button.
    If you want to book an order then do that by clicking **Book Order**

Finding a quote

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Steps:

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Product on Quote is Mutually Exclusive with Installed Base product

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Steps:

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Saving a Quote

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Steps:

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Quote Expiration

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Steps:

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Modify or Update a Saved Quote

A quote can be submitted as an order. Note that you can remove items from a Quote via the Workbench, but you cannot add or change any products on the Quote.

Steps:

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Orders

Book an order

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Steps:

1. `Navigate to Order Management: Order Capture Navigator`

1. Find the customer

2. Goto **Product Catalog** tree

3. Expand **Categories & Prices**

4. Find the Product in which the customer is interested

5. Click **Add To Order**

6. Click on **Workbench** on the customer contact information screen.
    This will bring information about Quotes and Lines

> **Note:** You must capture required item action parameters

7. Click on **Save Quote** button.
    This creates the order.

Order status

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Steps:

1. Navigate to Order Management: Order Navigator

2. Identify the customer

3. Click on the Orders tab - this brings a list of all orders for a customer.

4. Orders should be categorized by 5 different categories

- **New** (just created - not started processing) - you can make changes
- **Open** (still processing) - cannot make changes
- **Canceled** (customer canceled)
- **Closed** (COMPLETED)
- **Error** (provisioning error)

> **Note:** Copy order will copy any order to a new quote

Order: availability

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Steps:

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Order

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Steps:

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One-time (Non-recurring)

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Steps:

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Charges tab

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Steps:

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Cross-sell and Up-sell

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Steps:

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Order Pricing Discounts (Monetary Amounts or Percentage)

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Steps:

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Shipping Charges

There is a field, labeled 'Ship Charges' on both the Header tab and the Lines tab in the Order Workbench. The field appears under both the One-time column and the Recurring column. For shippable items with shipping charges, this field should be populated in the One-time column.

Order with Item Action Parameter

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Change existing service

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Change Installed Base Parameters

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