Oracle ® Customer Care

Implementation Guide

Release 11*i*

July 2001

Part No. A90411-01

Oracle Customer Care Implementation Guide, Release 11*i*

Part No. A90411-01

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Preface

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

This Implementation Guide provides information and instructions to help you set up Oracle Customer Care.

This preface explains how this Implementation Guide is organized and introduces other sources of information that can help you.

Intended Audience

This guide is aimed at the following users:

- Technical Service Representatives (TSR)
- Customer Service Representatives (CSR)
- System Administrators (SA), Database Administrators (DBA), and others with similar responsibility.

This guide assumes you have the following pre-requisites:

1. Understanding of the company business processes.
2. Knowledge of products and services as defined by your marketing policies.

Structure

This manual contains the following chapter:

Implementing Customer Care provides step by step procedures for setting up Oracle Customer Care.

This manual also contains an appendix which provides detailed technical information about enabling relationship plans.

Related Documents

For more information, refer to the following manuals:

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

Conventions

The following conventions are 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.

1

Implementing Customer Care

This implementation guide provides general descriptions of the setup and configuration tasks required to successfully implement Oracle Customer Care.

This following topics are covered:

- Running the Relationship Plan Assignment Engine
- Setting Up Quick Menu
- Setting up Address Flexfields
- Defining Profile Options

Note: You must use the Customer Support responsibility for performing the setup procedures detailed in this document. Exceptions, if any, are clearly indicated.

1.1 Setting Up Customer Profiles

The Customer Profile module displays relevant summarized information about the customer that is appropriate for the support agent to know. It may contain information such as the number of open service requests, the critical customer status and the number of cancelled orders. These profile checks are flagged by appropriate ratings and colors which provide instant visual clues to the agent to assist in appropriate engagement with the customer. Customer Profiles also furnish the ability to drill down from a profile check to a detailed list and then to the original transaction.

The Customer Profile module allows users to define their own profile checks, and combine multiple checks with complex criteria. It is also possible to define critical customer criteria by using customer profile checks.

The Customer Profile module provides the following 37 predefined profile checks:

- Open Service Request
- Escalated Service Requests
- Open Tasks
- Approved Tasks
- Cancelled Tasks
- Rejected Tasks
- Accepted Tasks
- On-Hold Tasks
- Active Contracts
- Entered Contracts
- Terminated Contracts

- Cancelled Contracts
- On-Hold Contracts
- Expired Contracts
- Booked Orders
- Open Orders
- Cancelled Orders
- Open Defects
- Escalated Defects
- Installed Base Size
- Satisfaction
- Loyalty
- Profitability
- Revenue
- Critical Customer
- Net Income
- Number of Employees
- Customer Opportunities
- Number of Opportunities
- Number of Leads
- Number of Quotes
- Current Revenue
- Do No Email
- Do Not Call
- Do Not Mail
- Do Not Fax
- Date of Birth

The Customer Profile engine is part of the Customer Profile module that runs periodically to check and store changes to profile checks.

Follow these steps to setup Customer Profiles:

- Define Profile Ratings
- Define Preferences
  - Define Rating Labels
  - Define Categories
- Define Profile Variables
- Define Drilldowns
  - Define First Level Drilldowns
  - Define Second Level Drilldowns
- Define Profile Checks
- Define Profile Groups
- Define Dashboard Groups
- Associate Profiles with Modules
- Run the Customer Profile Engine

1.1.1 Defining Profile Ratings

You define profile ratings to select the profile checks you want to display in the Contact Center. The profile ratings are assigned to profile checks, so you can tell when a profile check reaches a certain level, such as High, Medium or Low. The profile ratings of High, Medium and Low are predefined.

You must create profile rating codes before you can use them in the Profile Check tab.

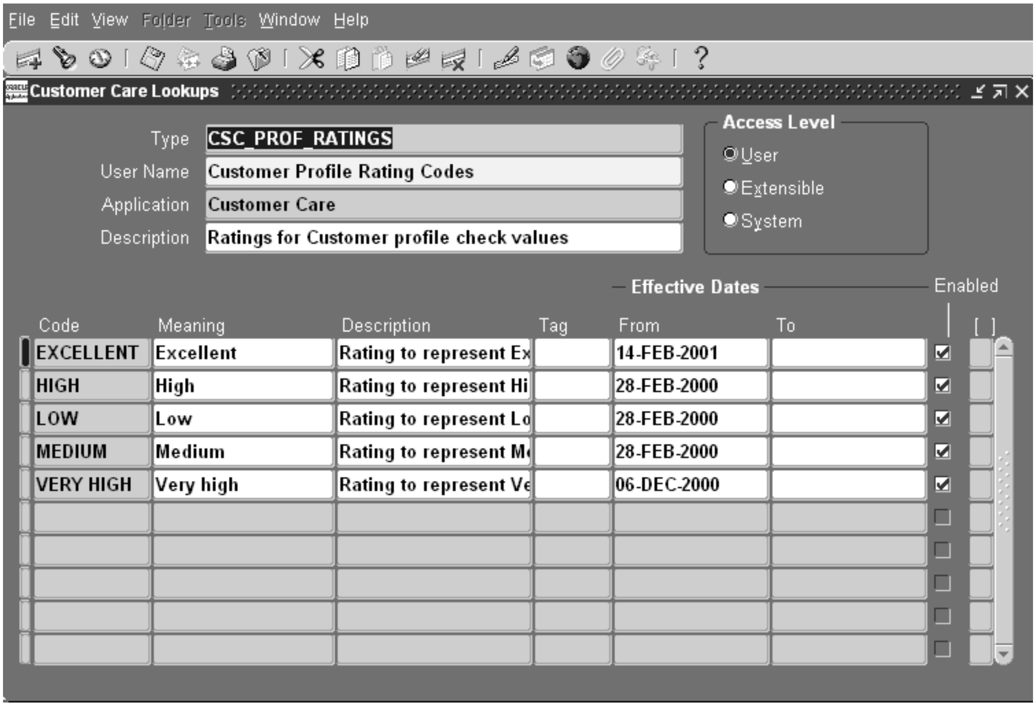
Prerequisite

None

To define profile ratings:

1. Open the Customer Care Lookups window using the following navigation path:

   Setup > Customer Care Lookups



2. Open Customer Profile Rating Codes by running a query on the Type of CSC_PROF_RATINGS. Three predefined ratings—High, Medium and Low—are predefined in the module. You may create new rating codes.
3. To create a new rating code, click the Add button on the toolbar.
4. Navigate to the new record and enter a name for the rating code in the Name field.
5. Enter a value for in the Code fields.
6. Enter a value in the Meaning field.
7. Optionally enter a description in the Description field.
8. The Tag field is not used.
9. Optionally enter dates in the Effective Dates fields.
10. Verify that the Enabled check box is selected.

11. Save your work.

See Also:

- Defining Profile Variables
- Defining Profile Checks

1.1.2 Defining Rating Labels

In the Ratings Labels section of the Customer Profile Preferences tab, you define rating labels and assign colors to the ratings. See Defining Profile Ratings for more information about ratings.

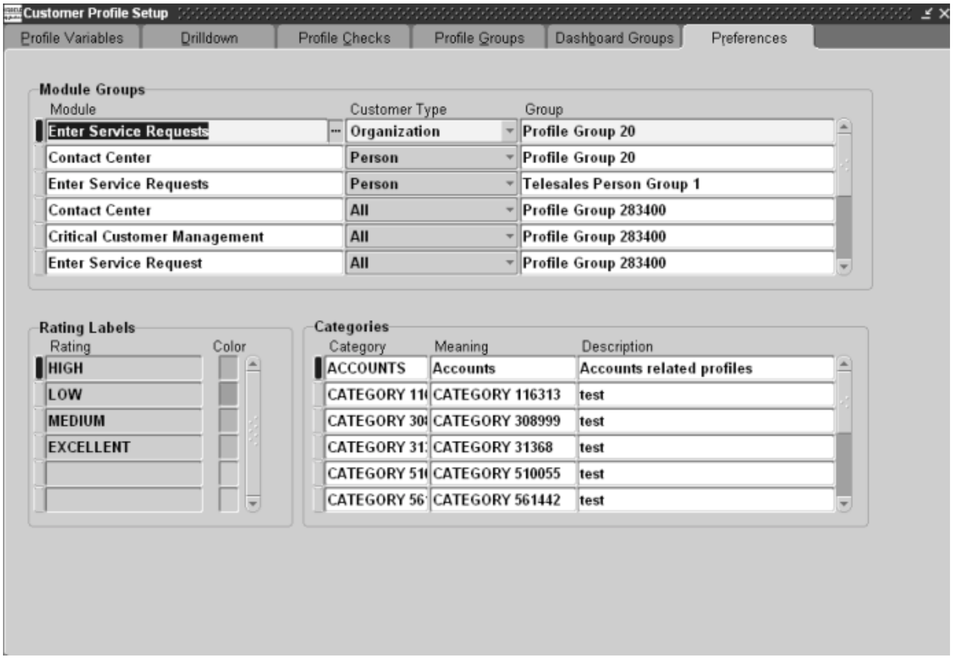
Prerequisite

You must define Profile Ratings before you can define rating labels.

To define rating labels:

1. Open the Preferences tab using the following navigation path.

   Setup > Customer Management > Customer Profiles > (T) Preferences
2. Go to the Rating Labels region. Select a rating from the Rating list of values.
3. Select a color to associate to the rating from the Color list of values.
4. Save your work.



1.1.3 Defining Categories

In the Categories section of the Preferences tab, you define categories to be used in the Dashboard tab to group profile checks. This allows you to display your profile checks in organized groups on the Dashboard tab of the Contact Center. For example, open, escalated and accepted tasks can all be grouped under the Tasks category.

Prerequisite

None

To define categories

1. Open the Preferences tab using the following navigation path.

   Setup > Customer Management > Customer Profiles > (T) Preferences

2. Go to the Categories region of the form. Enter a category name in the Category field.

3. Enter a meaning for the category in the Meaning field.
4. Optionally enter a description for the category in the Description field.
5. Save your work.

1.1.4 Defining Profile Variables

A profile variable contains the SQL statement that is executed to retrieve the customer profile value. Other attributes include table columns to be used for drilling down.

SQL statements can contain two bind variables:

- :party_id - Use this variable if the SQL statement refers to a particular party
- :cust_account_id - Use this variable if the SQL statement refers to a particular account for a customer

No other bind variables are supported.

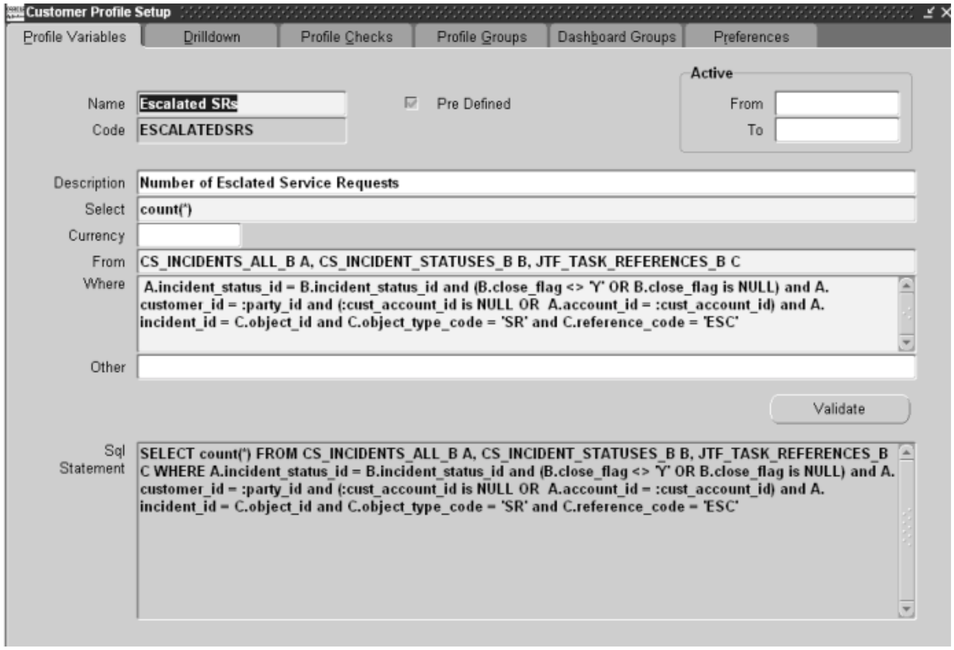
Prerequisite

None

To define a profile variable:

1. Open the Customer Care Lookups tab using the following navigation path:

   Setup > Customer Management > Customer Profiles > (T) Profile Variables
2. Click the Add button on the toolbar.
3. Enter a value in the Name field.
4. The Code field reflects the name you enter in the Name field. You can substitute the value in the Code field with another unique value.



5. Optionally enter dates in the Active: From and Active: To fields.
6. Optionally enter a description of the profile variable in the Description field.
7. Optionally enter a currency code in the Currency field.
8. Enter the appropriate components of the SQL statement in the following fields:
   - Select (mandatory field).
   - From (mandatory field).
   - Where (mandatory field).
   - Other (optional, used for including clauses such as Order By).
9. To validate the SQL statement, click **Validate**.
10. Save the profile variable. When you save the profile variable, the SQL statement is validated. You cannot save an invalid SQL statement.

See Also:

- Setting up Customer Profile

- Defining Profile Ratings
- Defining Profile Checks
- Defining Profile Groups

1.1.5 Defining Drilldowns

There are two levels of drilldowns that you can define. The first level of drilldown provides a summary list of the transactions which are displayed when you click any key indicator (profile check) displayed on the Contact Center Dashboard tab or Profile region. The second level of drilldown allows you to drilldown to the transaction form.

Prerequisite

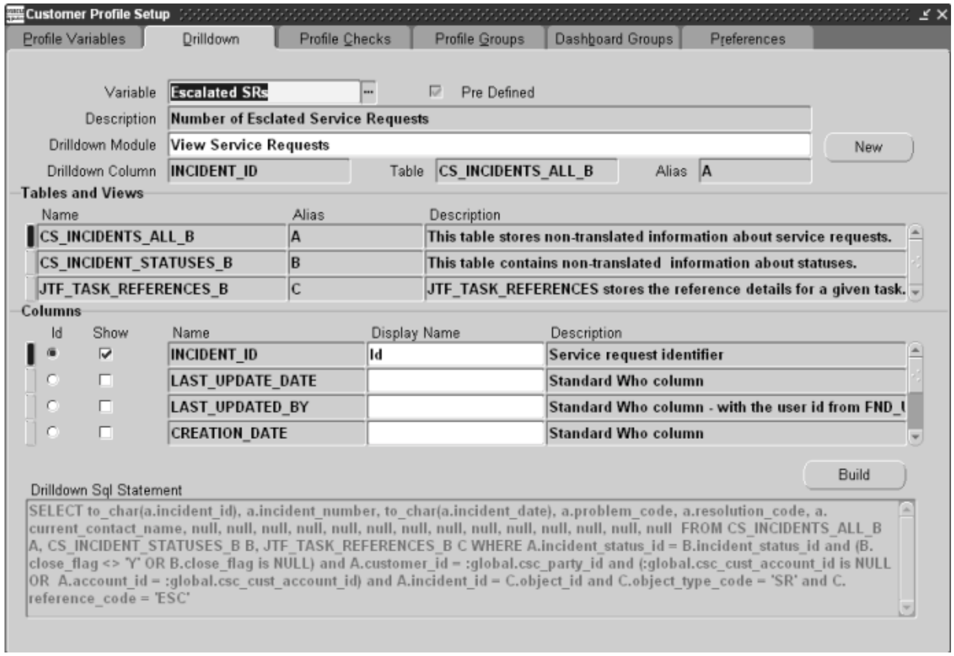
Profile Variables must exist.

To define the first level of drilldown:

1. Open the Drilldown tab using the following navigation path:

   Setup > Customer Management > Customer Profiles > (T) Drilldown

2. From the Variable field, select the profile variable for which you want to define the drilldown. The Description field as well as the Tables and Views sections display relevant information on the selected profile variable.
3. In the Columns section, enter a user-friendly name for the column in the Display name field. This name will be displayed in the summary list. You can choose up to twenty columns to display in the summary list.
4. Select the Show check box associated with the columns that you want to display on the Summary list.
5. Optionally, click **Build** to generate the SQL for the drilldown.
6. Save your work. The SQL statement is validated when you save. You cannot save an invalid SQL statement.



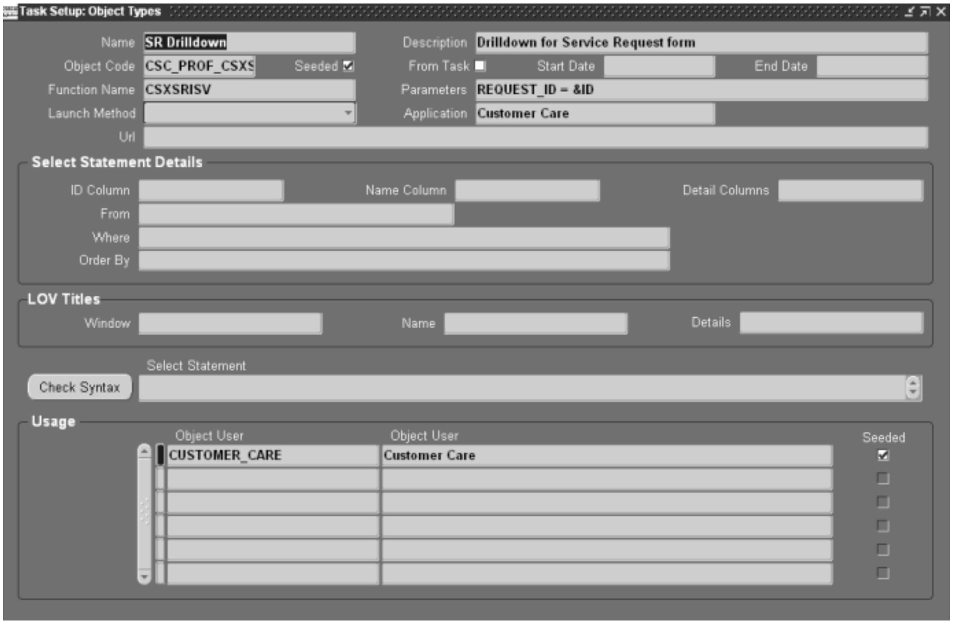
To define the second level of drilldown:

7. Without exiting the Drilldown tab, go to the Drilldown Module field and select the module which is to be linked to the profile variable.

8. If the required drilldown module is not available in the list of values for the Drilldown field, you can define a new one. Follow these steps to create a drilldown module:

   a. Click **New**.

   b. The Task Setup : Object types window opens.



c. Create an object_type with the object_code in the Field Name that begins with 'CSC_PROF'. An example is CSC_PROF_CSXSRISV.

d. Enter the function.

e. Enter the name and parameters.

f. Save your changes.

g. Close the form.

h. The new object code should now be available in the Drilldown Module field of the Drilldown tab.

9. The Tables and Views section lists all of the tables and views that are used by your SQL statement. When you click on the table or view name, the columns of this particular table or view are displayed.

10. In the Columns section, select one column as the ID column using the Id radio button. This is the column which allows the drilldown to the transaction screen. For example, if service request number is defined as the ID drilldown column, clicking on the service request number in the summary list of the transactions

opens the Service Request window containing the details of the service request.
Note: Only one ID column can be present for a profile variable.

11. Save your changes.

See Also:

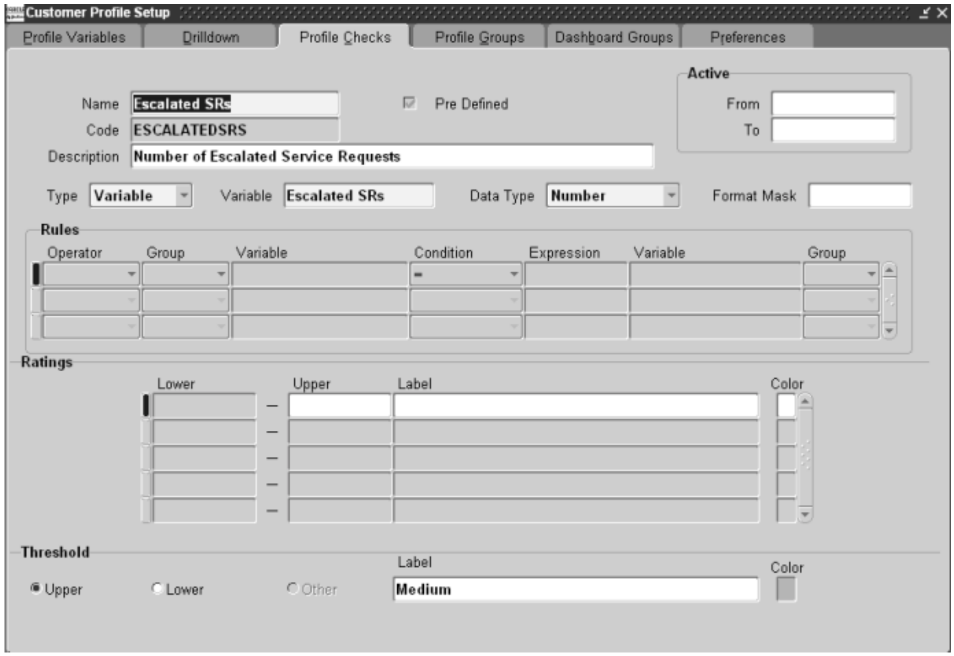
- Defining Profile Variables
- Defining Profile Checks
- Defining Profile Groups

1.1.6 Defining Profile Checks

Profile checks are created using one or more profile variables. Profile checks incorporate business rules upon which the profile values are based and are associated with grading levels and values. Each grade can have a different label and can be associated with a color. Profile checks can also have threshold values. A threshold indicates an upper or lower boundary for the profile check. A profile check can be configured so that it is displayed only when the check value crosses the threshold.

Prerequisite

- You must define profile ratings.
- You must associate profile ratings with a color by creating a rating label.



To define profile checks:

1. Open the Profile Checks tab using the following navigation path:

   Setup > Customer Management > Customer Profile Setup > (T) Profile Checks

2. Enter a name for the profile check in the Name field.
3. The Code field defaults to the name you enter in the Name field. You can substitute the value in the Code field with another unique value.
4. Enter a description for the profile check in the Description field.
5. Enter the date when the profile check is to be in force by specifying the Active From and Active To fields.
6. In the Type field, select the profile check type you want to create. The choices are **Variable** and **Yes or No**.
7. In the Variable field, select the variable on which the profile check is to be based.

8. In the Data Type field, enter the data type for the variable you have selected. The choices are **Number, Char, Date** and **Boolean**. For details about defining a Boolean Profile Check, see To define a boolean profile check.

9. In the Format Mask field, enter a format mask, if appropriate.

10. In the Ratings section, define set(s) of numeric low and high values to represent the different value ranges. Also select an appropriate label for the rating set. The color appropriate to the rating will be automatically assigned after you select a label.

11. If needed, set the threshold for the rating and select a label for it. To define the threshold for the current rating, click the Upper or Lower radio button in the Threshold section. This threshold is used later in Profile Groups and Dashboard Groups.

12. Save the profile check you have defined.

To define boolean profile checks:

1. Perform steps one through five as explained in the previous section.
2. In the Type field, select Yes or No. The Data Type field defaults to Boolean.
3. In the Rules section, build a logical condition (rule) for comparing one or more existing profile variables.
4. Save the profile check you have defined.

See Also:

- Defining Profile Ratings
- Defining Profile Variables

1.1.7 Defining Profile Groups

A profile group is a set of profile checks that are to be displayed together. The profile checks inside a group can be sequenced. The group can be associated with a form name to indicate the check values and the order in which they are displayed when viewing the profile from that form.

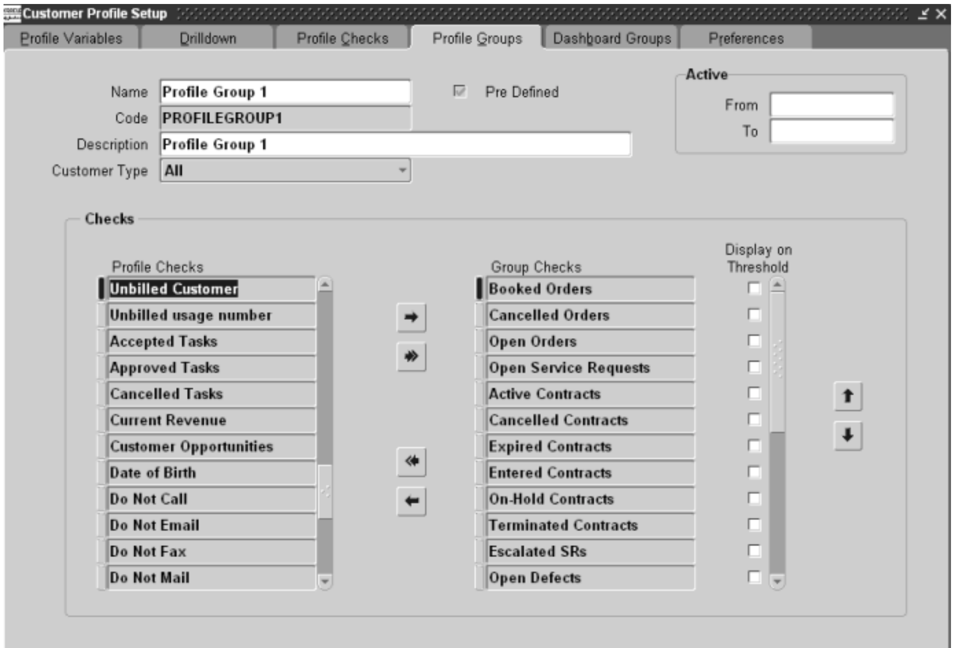
Prerequisite

You must define Profile Checks before you can define Profile Groups.

To define profile groups:

1. Open the Profile Groups tab using the following navigation path:

   Setup > Customer Management > Customer Profiles > (T) Profile Groups



2. In the Name field, enter a name for the profile group.
3. All existing profile checks are displayed in the checks region.
4. The Code field defaults based on the value you entered in the Name field.
5. In the Description field, optionally enter a description for the profile group you are defining.
6. In the Customer Type field, select the customer type you want to associate with the profile group. You can choose Person, Organization, or All as the customer type. For instance, you can create Profile Group A for Organizations and Profile Group B for Persons. If a caller calls on behalf of an organization in a B2B scenario, then Profile Group A displays. If a caller calls on behalf of himself in a B2C scenario, then Profile Group B is displayed.
7. Optionally enter dates in the Active From and Active To field.

8. In the Checks section, follow these steps:

   a. Select the appropriate profile check from the Profile Checks column and move it to the Group Checks column. Use the right and left arrow buttons to move the profile checks between the columns. Use the up arrow and down arrow buttons to move the selected group check up or down in the list.

   b. Select the Display on Threshold check box if you want the check to be displayed only when the threshold level has been crossed. For example, if the upper limit of Open Service Requests is 20 and the customer opens their 21st service request, the profile check will appear in the dashboard. If you want to display a profile only when a threshold is crossed, you must have a threshold defined for this profile check. See Defining Profile Checks for additional information.

9. Save the Profile group.

Note: The Group Party type is no longer supported in this module.

See Also:

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

1.1.8 Defining Dashboard Groups

The Dashboard Groups tab is used for defining groups of profile checks that are displayed on the Dashboard tab of the Contact Center.

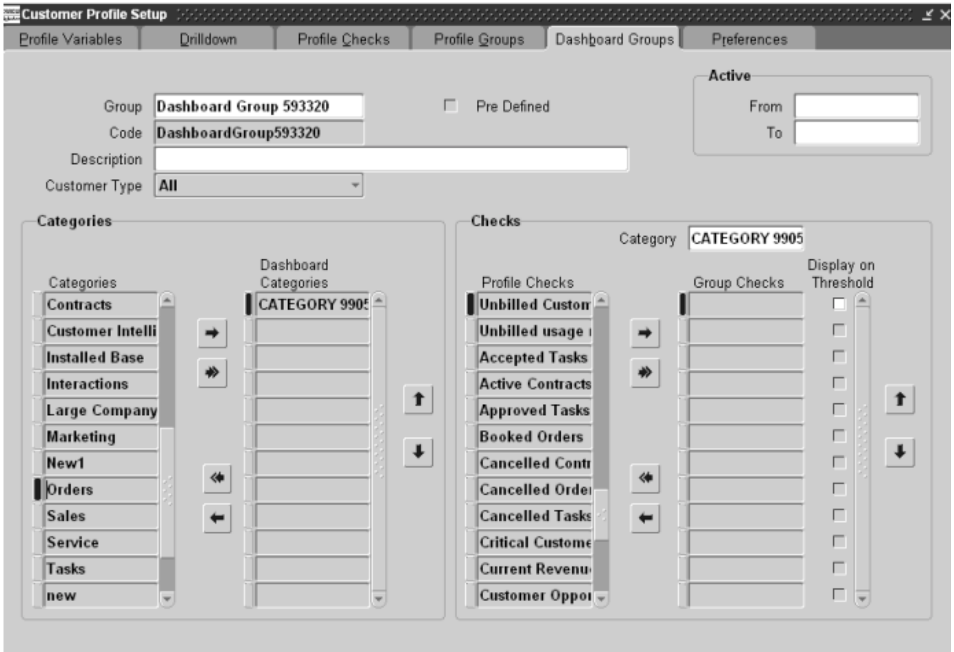
Prerequisite

- You must define Profile Checks before you define Dashboard groups.
- You must define Categories before you define Dashboard groups.

To define dashboard groups:

1. Open the Dashboard Groups tab using the following navigation path:

   Setup > Customer Management > Customer Profiles > (T) Dashboard Groups



2. Enter a name for the Dashboard Group in the Group field.
3. The Code field defaults based on the value you entered in the Name field.
4. Enter a description for the Dashboard Group in the Description field.
5. In the Customer Type field, select the customer type you want to associate with the dashboard group. You can choose Person, Organization, or All as the customer type.
6. Optionally enter the dates in the Active From and Active To fields when the dashboard group is to be active.
7. In the Categories section, select the categories for the Dashboard Category. To do this, move the categories you want to include in the dashboard from the Category column to the Dashboard Categories column.

   Use the right and left arrow buttons to move the Categories between the columns. Use the up arrow and down arrow buttons to move the selected dashboard category up or down in the list. This sequence determines the display sequence on the Dashboard tab of the Contact Center.

Categories help group profile checks. For example, open, escalated and accepted tasks can all be grouped under the Tasks category. This helps to organize the display on the Dashboard tab of the Contact Center. Categories are created from the Preferences tab of the Customer Setup Profile window.

8. Save your changes. If you do not save your changes, then your dashboard categories will not be available in the next step.
9. In the Category field in the Checks section, select the category for which group checks are to be defined. Use the right and left arrow buttons to move the profile checks between the columns labeled Profile Checks and Group Checks. Use the up arrow and down arrow buttons to move the selected group check up or down in the list. This sequence determines the display sequence on the Dashboard tab of the Contact Center.
10. Select the Display on Threshold check box if you want the check to be displayed only when the threshold level has been crossed. For example, if the upper limit of your threshold is 20 and this threshold is crossed, the profile check will appear in the dashboard. If you want to display a profile only when a threshold is crossed, you must have a threshold defined for this profile check.
11. Save your dashboard group.

Note: The Group Party type is no longer supported in this module.

See Also:

- Defining Profile Variables
- Defining Profile Checks
- Defining Profile Groups
- Defining Categories

1.1.9 Associating Profiles with Modules

The Preferences tab may be used to override the default preferences for the customer profile. In the Module Groups section, you select modules to be associated with the customer type and dashboard/profile group. For example, Contact Center module may be associated with Organization and a profile group.

There are four modules which integrate with Customer Profiles. Dashboard groups may be associated with the module called Customer Dashboard. Profile groups mays be associated with the modules called Contact Center, Enter Service Request and E-Business Center.

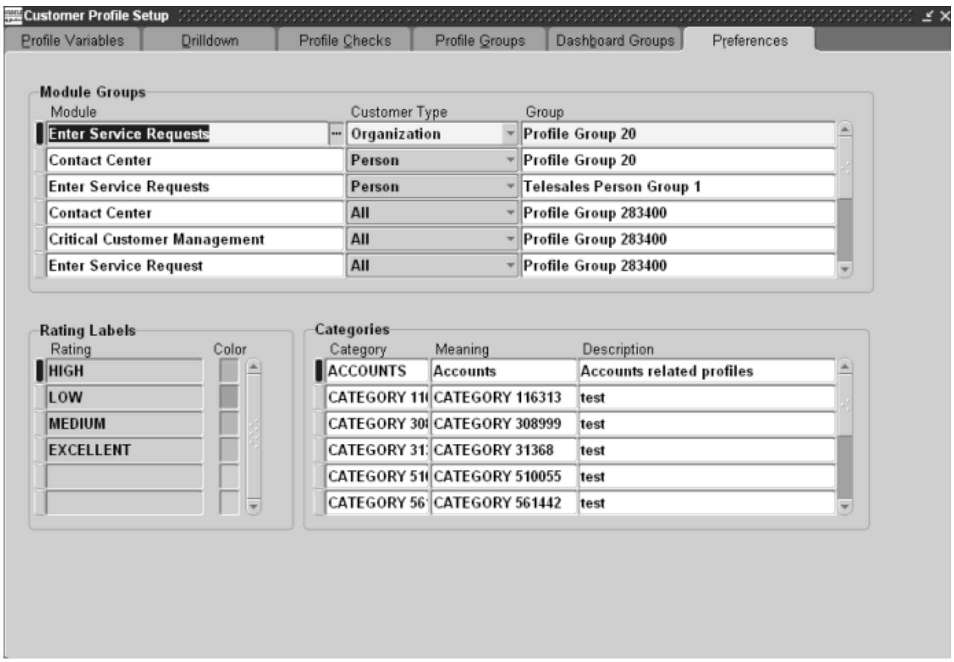
Prerequisite

None

To associate profiles with modules:

1. Open the Preferences tab using the following navigation path:

   Setup > Customer Management > Customer Profiles > (T) Preferences



2. Select a module from the Module list of values to associate with a customer type. Although all modules appear in the list of values, you must select either Customer Dashboard, Contact Center, Enter Service Request or E-Business Center.
3. Select a customer type. The choices are All, Person and Organization.
4. Select or enter a profile group or dashboard group to be associated with this module.
5. Save your work.

1.2 Running the Customer Profile Engine

The Customer Profile Engine is a server side PL/SQL concurrent program. You must run the Customer Profile Engine after completing the customer profile setup process so that all the SQL statements defined during the setup are executed to generate the appropriate profile values. The Customer Profile Engine, when executed, performs the following operations in the sequence below:

- Evaluates the results of all the effective profile variables.
- Evaluates the results of all effective profile checks based on the profile variables.
- Evaluates the results for all the customers and accounts.

The Customer Profile Engine can be run in two ways:

- As a concurrent program (for more information on running concurrent programs, refer to the Oracle System Administator's Guide).
- By clicking the Refresh button available in the Profile section or the Dashboard tab of the Contact Center. The refresh will fetch the latest data for the customer selected in the Contact Center.

1.3 Setting Up Relationship Plans

The Relationships Plan module is designed to enable organizations to automate their customer service practices and to provide proactive and consistent care for all their customers. Organizations can create and execute different plans for different types of customers. Relationship plans can be configured to uniquely target each customer and ensure an appropriate customer profile. Execution of relationship plans improves real time responses to customer concerns which promotes customer loyalty and enhances profitability.

Follow these steps to setup Relationship Plans:

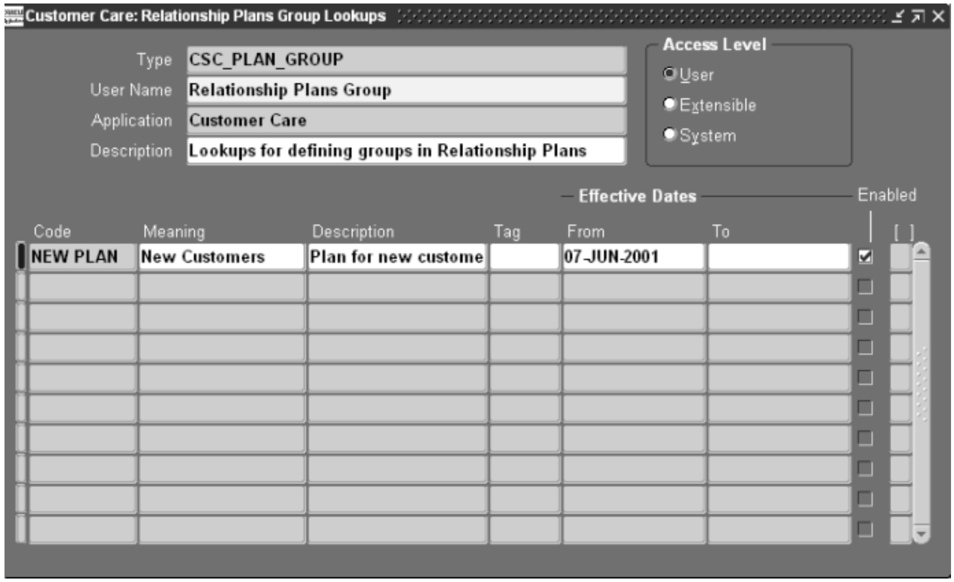
- Prerequisite Steps
  - Define Plan Groups (optional step)
  - Define Actions
  - Define Process Definitions for Outcomes
  - Define Messages
- Setting up Relationship Plans
  - Define Relationship Plans
  - Add or Modify Relationship Plan Condition Lines
  - Enable Relationship Plans
  - Run the Relationship Plan Assignment Engine

1.3.1 Defining Plan Groups

Plan groups help organize relationship plans into logical groups. Defining Plan Groups is an optional step in the setup of Relationship Plans.

Prerequisite

None



To define Plan Groups:

1. Open the Relationship Plans Group Lookup window using the following navigation path:

   Setup > Relationship Plans > Define Plan Groups

2. In the Details block, insert a new row by clicking the New icon on the tool bar.
3. In the new row, enter a value in Code field.
4. Enter a value in the Meaning field.
5. Enter a value in the Description.
6. The Tag field is not used in Customer Care.
7. Optionally enter dates in the From and To fields.
8. Save your plan group.

See Also:

Defining Relationship Plans

1.3.2 Defining an Action

You must define an action before it can be used for defining condition lines for the Relationship Plan. Customer Care provides one predefined action which has one attribute called CUST_NAME. When you define a condition line for a relationship plan, you must ensure that each condition has a unique action attached to it. You can use the same attribute, CUST_NAME, for each action, if desired. If you decide to use an action with an attribute other than CUST_NAME, you must customize the code in the Action Assembler to accept the new attribute.

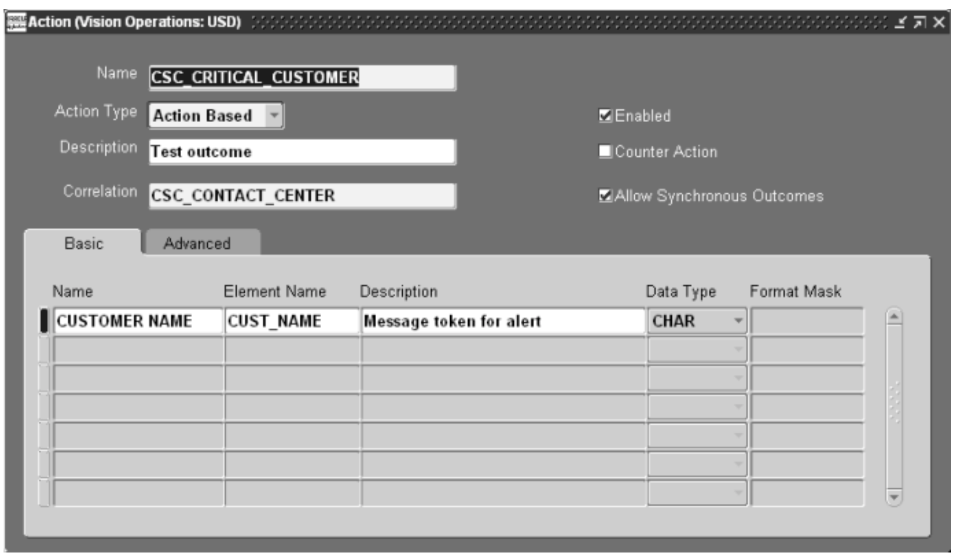
Prerequisite

None

To define an action:

1. Open the Action window using the following navigation path:

   Setup > Relationship Plans > Events > Define Action



2. Enter the name of your action in the Name field.
3. Select only Action Based in the Action Type field. Date Based is not supported for this release.

4. Optionally enter a description of your action in the Description field.
5. Enter a value in the Correlation field that begins with 'CSC_' to correlate your action to Customer Care.
6. Select the Enabled and Allow Synchronous Outcomes check boxes.
7. In the Basic tab, enter a name to describe the Element to be used in the action attribute.
8. CUST_NAME is the attribute that derives the customer name and is used as the Element Name in the Action. This same attribute name must be used in the Process Definition and the Message Definition.
9. Optionally enter a description in the Description field.
10. Select a data type of CHAR, NUMBER, or DATE in the Data Type field.
11. Select a format mask, if appropriate.
12. Save your action.

See Also:

- Defining Process Definition
- Defining Relationship Plans
- Adding or Modifying Relationship Plan Condition Lines
- Enabling Plans

1.3.3 Defining Process Definitions for Outcomes

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

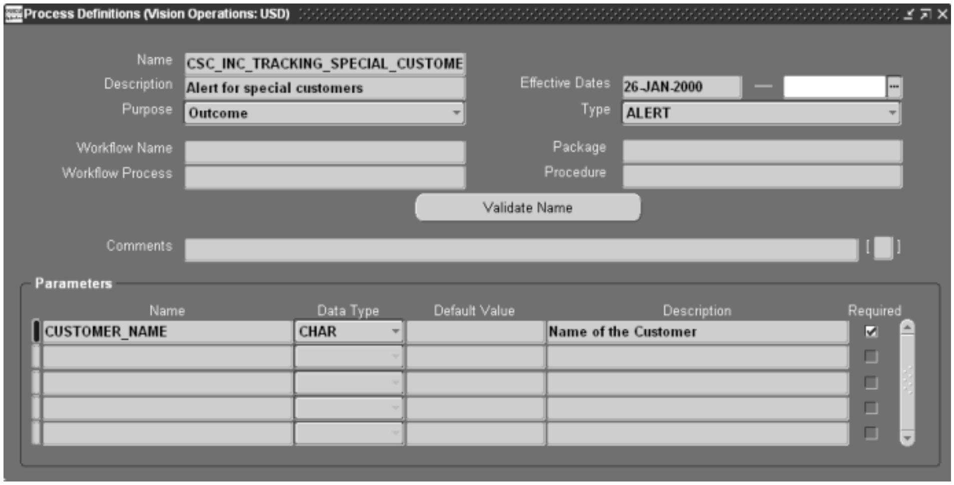
Prerequisite

The Parameter name used in the Process definition must be the same as the Element Name used in the related Action.

To define process definitions:

1. Open the Process Definitions window using the following navigation path:

   Setup > Relationship Plans > Events > Define Process Definitions



2. Enter a name for the process in the Name field. If you are defining an Alert process, the name of the process must be the same as the Message Name.
3. Optionally enter a description in the Description field.
4. Select a value of Outcome in the Purpose field.
5. Select either Alert, Script, PLSQL or Workflow in the Type field. If you select Workflow, enter values for Workflow Name and Workflow Process. If you select PLSQL, enter values for Package and Procedure.
6. Optionally enter comments in the Comments field.
7. If you are defining a PLSQL or Workflow process, click **Validate Name** to validate the name of the Workflow process or the PLSQL package.
8. In the Parameters section, enter a value in the Name field that is the same value you used as the Element Name in your Action definition.
9. The Data Type defaults.
10. Optionally enter values in the Default Value and Description fields.
11. Save your process definition. For additional information about defining process definitions, refer to Setting up Events in the *Oracle Contracts Concepts and Procedures Guide*.

See Also:

- Defining an Action
- Defining Relationship Plans
- Adding or Modifying Relationship Plan Condition Lines
- Enabling Plans

1.3.4 Defining Messages

Messages are defined for use in displaying messages about customers in real-time alerts. If you want to use your message in an application in addition to Customer Care, you must define your message for each application.

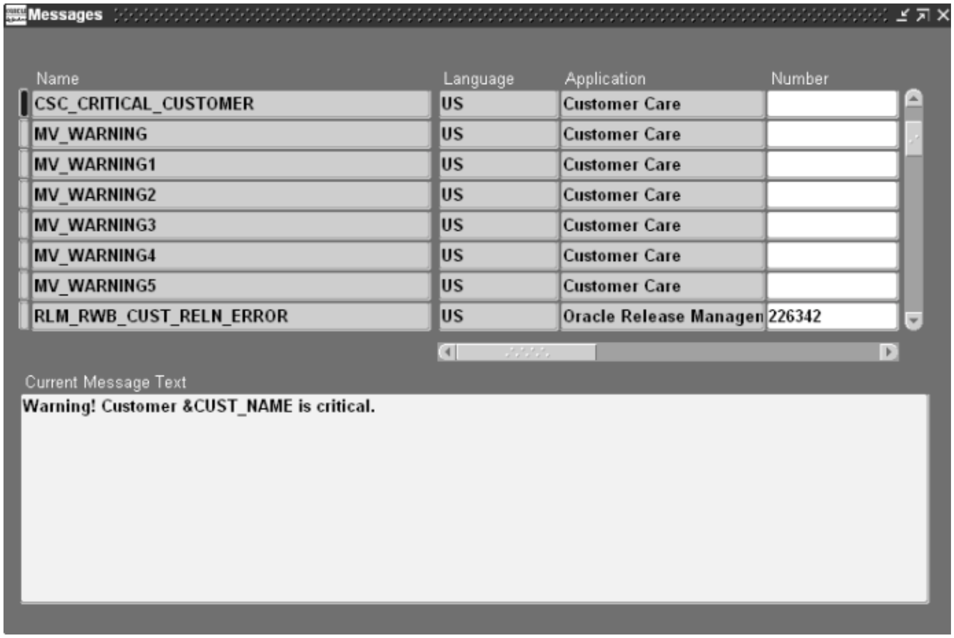
Prerequisite

None

To define messages:

1. Using Application Developer as your responsibility, open the Messages window using the following navigation path:

   Application > Messages.



2. Enter a name for your message in the Name field. If you are defining a message to be used with an Alert process, the name of the message must be the same as the name of the process.
3. Select a language from the Language list of values.
4. Select Customer Care from the Application list of values.
5. The remaining fields, Number, Type, Maximum Length and Description, are optional fields.
6. In the Current Message Text field, enter the message that you wish to appear as a real-time alert. If you want to use a token, such as Customer Name, in the message, the token name must be the same name as the parameter used in the Process Definition, which is the same name as the Element Name defined in the Action.
7. Save your message.

1.3.5 Defining Relationship Plans

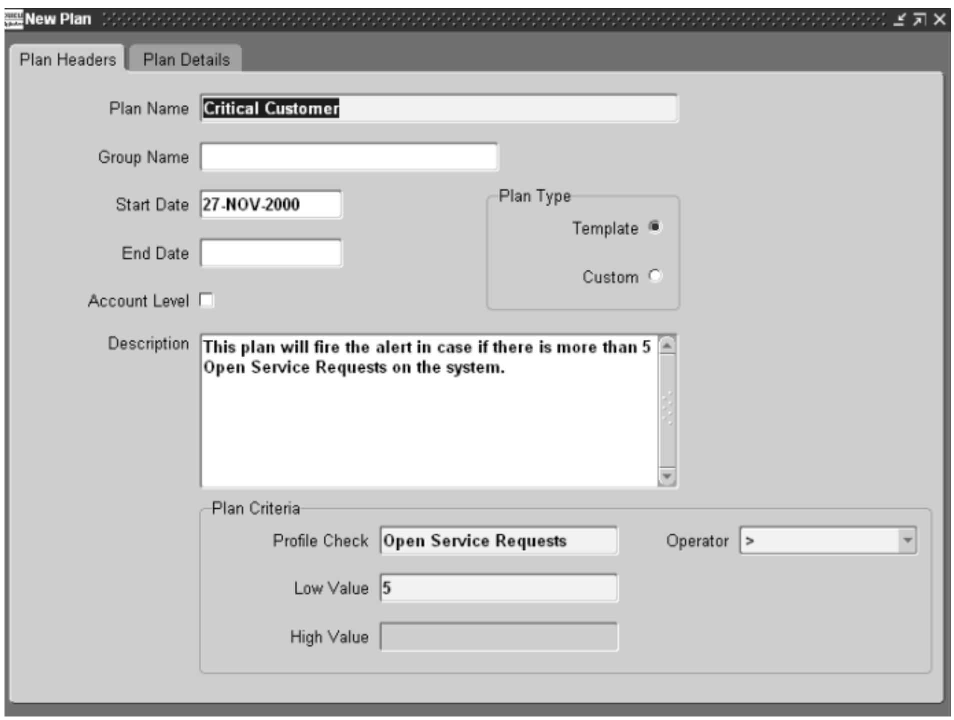
Prerequisites

- You may optionally define Plan Groups.
- You must define Actions.
- You must define Process Definitions.
- You must define Messages.

To define relationship plans:

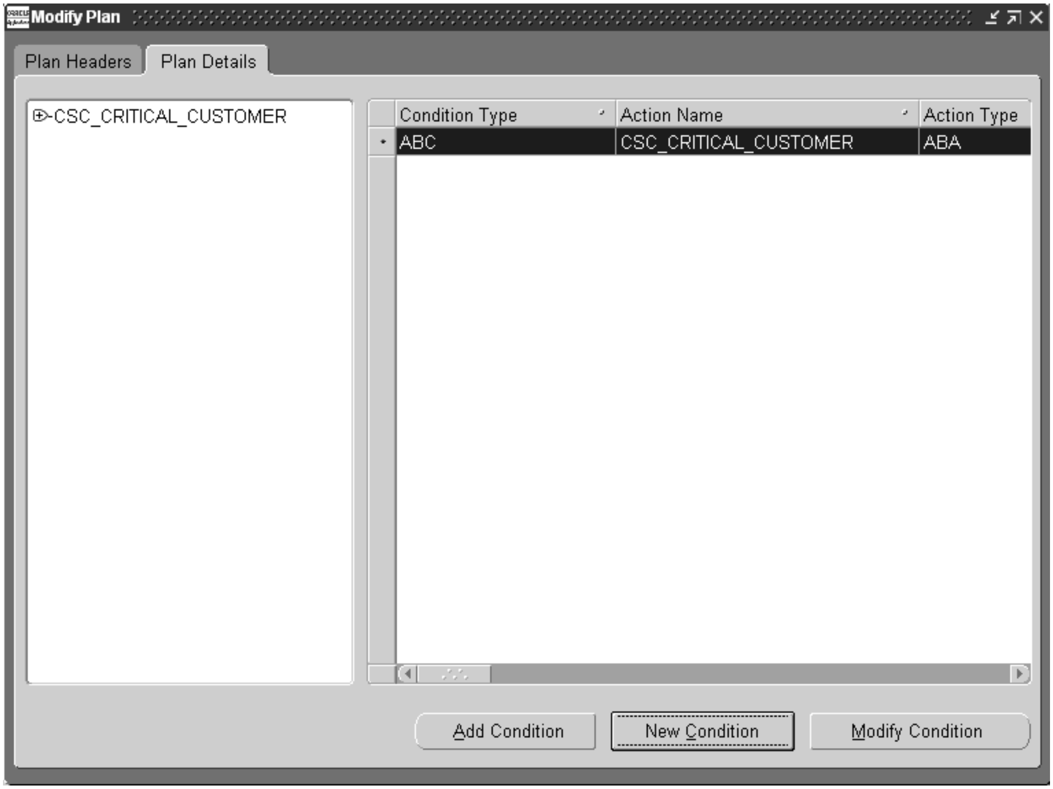
1. Open the New Plan window using the following navigation path:

   Setup > Relationship Plans > Define Relationship Plans

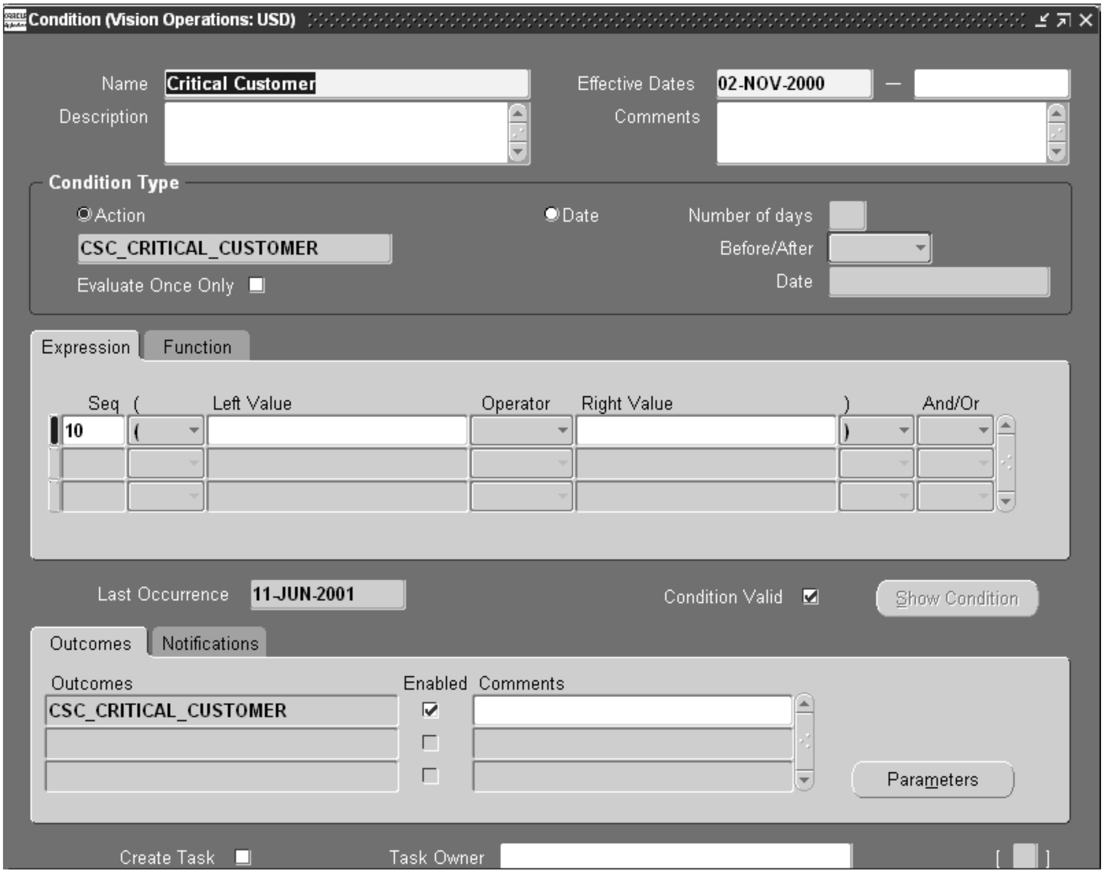


2. In the Plan Header tab, enter a name for the plan in the Name field.

3. Optionally select a group name from the Group Name list of values if you previously defined plan groups.
4. Optionally enter start and end dates for this relationship plan.
5. Select the Account Level check box if you want to create a plan that is valid at the account level. If you do not select the Account Level check box, the plan is targeted at the party level. An example of the usage of an account level relationship plan would be the creation of a specific relationship plan for a customer that generates a significant amount of revenue.
6. All relationship plans are initially created from a template, so you select the Template check box in the Plan Type section. The Custom check box can be used only from the Inquiry tab when you customize a relationship plan for one specific customer.
7. Enter a description of the Relationship Plan in the Description field.
8. In the Plan Criteria section, you define the criteria to be used by the Relationship Plan Assignment Engine to determine associations between customers and relationship plans. Select a profile check from the Profile Check list of values. The values in the list are dependent on the profile checks you previously defined.
9. Select an operator from the Operator list of values. The choices are =, <, >, >=. <=, Between, and Not Between.
10. Enter a low value in the Low Value field.
11. Enter a high value if you previously selected an operator value of Between or Not Between.
12. Save your relationship plan.
13. Open the Plan Details tab.

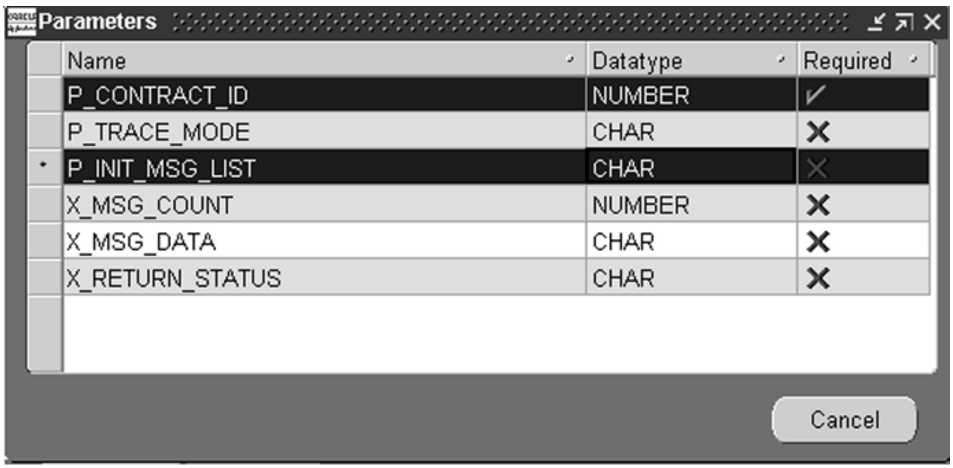


14. Click **New Condition** to open the Condition window.

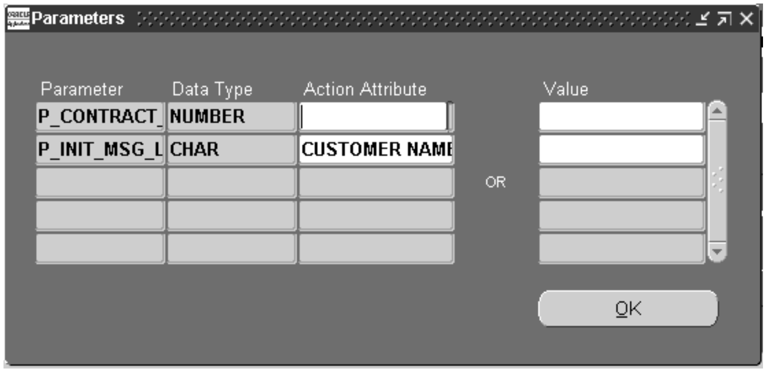


15. Enter the name of your condition in the Name field.
16. Optionally enter effective dates for your condition.
17. Optionally enter a description of your condition in the Description field.
18. Optionally enter comments about your condition in the Comments field.
19. In the Condition Type region, select the Action radio button. The Date condition type is not supported in relationship plans.
20. Select an action from the Action list of values. The list of values contains actions that you previously defined. You must use a unique action for every relationship plan. Only action attributes can be used to create condition lines.

21. The Evaluate Only Once check box is used if you want your condition to fire only once.
22. In the Outcomes region, select an outcome. Outcomes are defined as explained in the Defining Process Definitions for Outcomes section. Note that outcomes can be real time, such as alerts/scripts, or they can run in the background, such as tasks or workflow processes.
23. Click **Parameters** to open the Parameters window.



24. Select the appropriate parameter lines. Right-click to open the canvas menu.
25. Choose the Populate selected rows in PARAMETERS option. The following screen should be displayed.



26. Select an action attribute from the Action Attribute list of values.
27. Click **OK**.
28. Save the conditions and close the Conditions window.

See Also:

- Defining Plan Groups
- Defining an Action
- Defining Process Definitions for Outcomes
- Adding or Modifying Relationship Plan Condition Lines
- Enabling Plans

1.3.6 Adding or Modifying Relationship Plan Condition Lines

Prerequisites

- You may optionally define Plan Groups.
- You must define Actions.
- You must define Process Definitions.
- You must define Messages if you want to use an Alert process.
- You must define a workflow if you want to use a Workflow process.
- You must define a PLSQL procedure if you want to use a PLSQL process.

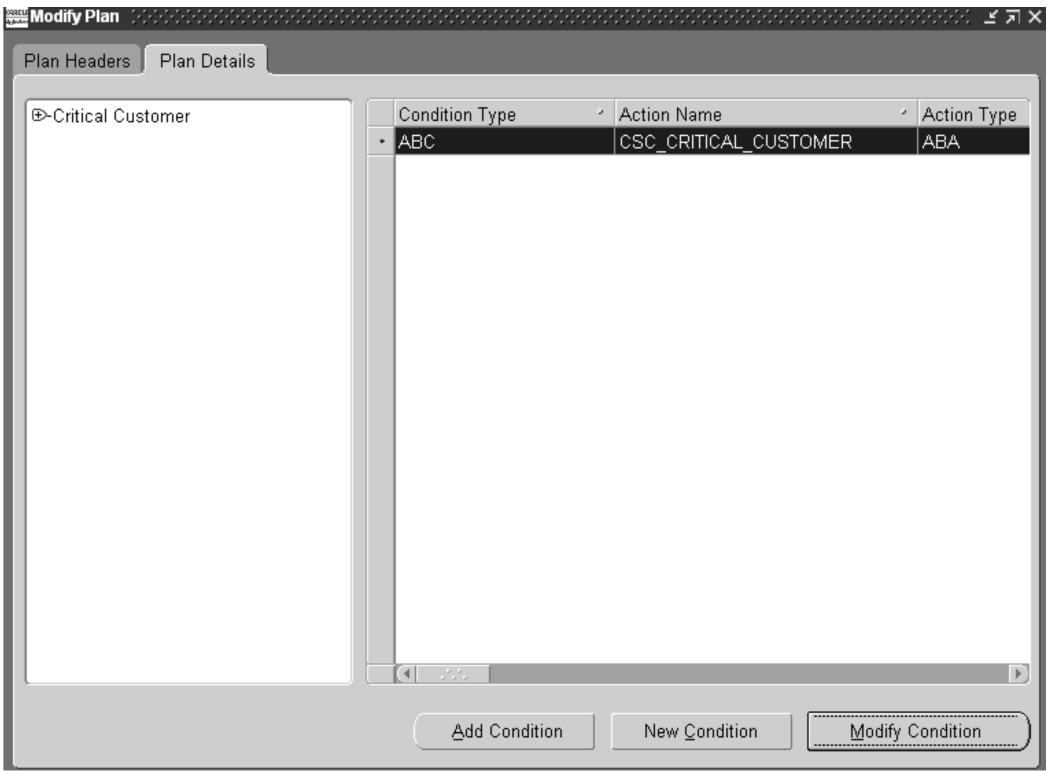
- You must define a Script if you want to use a Script process.
- You must define Relationship Plans.

To add or modify condition lines on a relationship plan:

1. Navigate to the Plan Details tab in the Modify Relationship Plans window.

   Setup > Relationship Plans > Define Relationship Plans

2. Query on the Relationship Plan to which you want to add condition lines.



3. From the Plan Details tab in the Modify Plan window, click **Add Condition**.
4. Select a condition line and click **OK** to attach it to the plan header.
5. To modify a condition lines on a relationship plan, do the following:
6. Click **Modify Condition** in the Plan Details window.

7. Make the necessary changes to the condition line or outcome.
8. Save the modified condition line.

See Also:

- Defining Plan Groups
- Defining an Action
- Defining Process Definitions for Outcomes
- Defining Relationship Plans
- Enabling Relationship Plans

1.3.7 Enabling Relationship Plans

Two forms are integrated with Relationship Plans - Contact Center and Enter Service Requests. These two forms have been designed to execute the triggers that you enable in this step. The Contact Center form can use the On-Insert, On-Update and Custom1 triggers. The Custom1 trigger fires on queries. The Service Request form can use the On-Insert and On-Update triggers. If you do not enable one or both of these forms in this step, the Relationship Plan Assignment Engine will ignore the form.

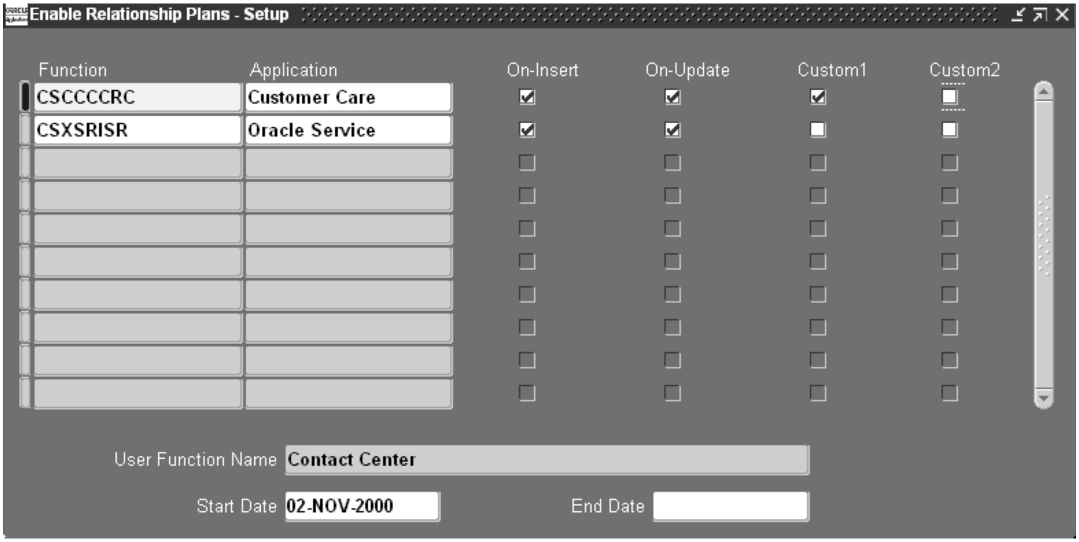
Prerequisite

None

To enable relationship plans:

1. Open the Enable Relationship Plans - Setup window using the following navigation path:

   Setup > Relationship Plans > Enable Relationship Plans



2. The Function list of values displays all forms, but Relationship Plans integrate only with the Contact Center and Enter Service Request forms. Select one of the following functions in the Function field:

   a. CSCCCCRC for the Contact Center form

   b. CSXSRIXSR for the Service Request form

   You can enable relationship plans in one or both of these forms.

3. There are four check boxes to indicate when you want the triggers in your relationship plan to fire. You can enable relationship plans on insert and/or on update. You can also use a predefined trigger called Custom1 to fire upon a query in the Contact Center form.

4. Optionally enter the Start and End dates.

5. Save the settings you have specified.

Note: Please refer to the Appendix, Enabling Relationship Plans, for additional information about this topic.

See Also:

- Defining Plan Groups

- Defining an Action
- Defining Process Definitions for Outcomes
- Defining Relationship Plans
- Adding or Modifying Relationship Plan Condition Lines

1.4 Running the Relationship Plan Assignment Engine

The Relationship Plan Assignment Engine is a server side PL/SQL concurrent program. You must run the Relationship Plan Assignment Engine after completing the relationship plan setup process so that all associations between customers and relationship plans are made. The Relationship Plan Assignment Engine performs the following operations:

- Evaluates all customers that meet relationship plan criteria and associates the customer with the appropriate relationship plan.
- Evaluates all customer that do not meet relationship plan criteria and disassociates the customer from the relationship plan.
- Checks for customers who have been manually assigned to relationship plans and ignores automatic association/disassociation rules for these customers.

1.5 Setting Up Quick Menu

Quick menu is based on seeded filters. Filters have a many to many relationship with AOL functions and are seeded in the Quick Menu tables. This section defines the association of the filter with its function in AOL.

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

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

You can also customize the Quick Menu.

1.5.1 Viewing System Profile Values

To view the profile values:

1. Open the System Profile Values window from the navigator.

2. Query on the profile name called Start Menu in Quickmenu.
3. The default value is Quick Menu for Customer Support.

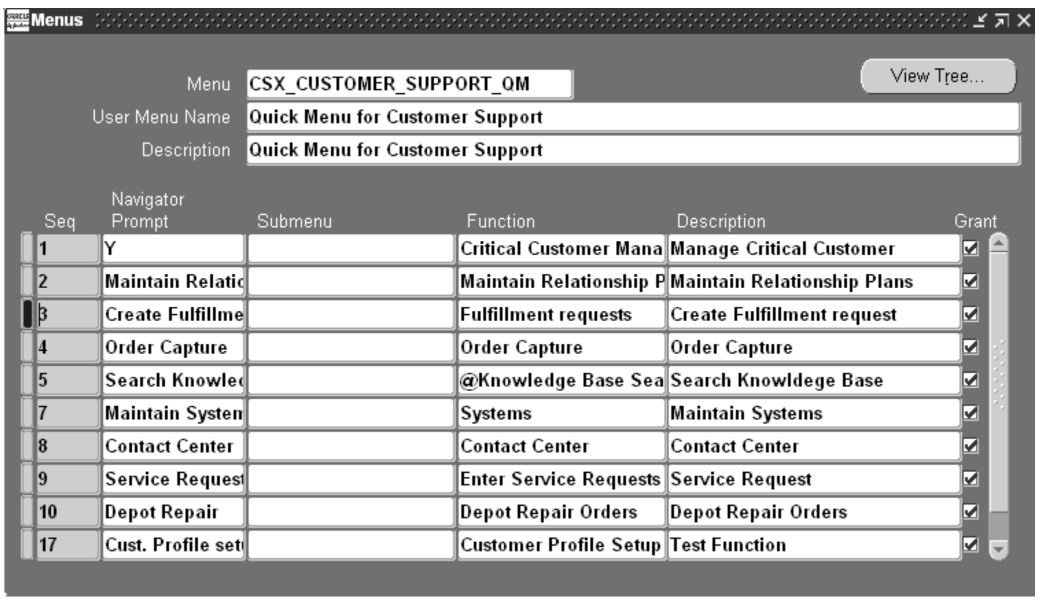
1.5.2 Verifying AOL Menu for Quick Menu

To verify an AOL menu for quick menu:

1. Using the Application Developer responsibility, open the Menus window using the following navigation path:

   Application—>Menu

2. Run a query to open the seeded menu CSX_CUSTOMER_SUPPORT_QM.



3. View the results of the query.
4. Close the window.

1.5.3 Customizing the Quick Menu

You can customize the Quick Menu by creating a unique menu in which you can add the quick menu enabled forms. Currently all the forms which the quick menu displays by default are quick menu enabled. Please refer to the Using Quick Menu section in the *Oracle Customer Care Concepts and Procedures Guide* for the complete list.

You can add any additional form function to the Quick Menu, even though the form function is not quick menu enabled. This allows you to quickly navigate to the form, but the variables in the original form are not passed to the form on the quick menu. Only quick menu enabled forms can accept variables from the original form.

1.6 Setting Up Address Flexfields

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

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

   Note: This was previously referred to as 'Remit Address'. For the new customer model, the flexfield has been changed to 'Remit Address HZ'.
4. Find out the value in the Title field.
5. Close this form.
6. Navigate to the Segments form: Flexfields >Descriptive >Segments.
7. Query up the record for the address flexfield by entering the value found in Step 4 for the Title field.
8. Uncheck the Freeze Flexfield Definition check box.
9. Create a new record in the Context Field Values to define an address style.
10. Enter a code, name and description for the style of address you want to define. For example, for United Kingdom, you can enter Code => UK, Name => UK, Description => United Kingdom.
11. Click **Segments** to open a new form for entering the different columns for that address style. For example for UK, you can specify the following columns: Address1, Address2, Address3, Town/City, County, Postal Code
12. You can also use the Open button for each of these columns and specify more attributes, for example whether the column is a required field or not.

13. Close the form.
14. In the Descriptive Flexfield Segments form check the Freeze Flexfield Definition check box.
15. Click **Compile** or **Save** to compile the flexfield definition and save your changes.
16. Close the form.
17. Navigate to the Lookups->Application Objects > Library form.
18. Query for Lookup 'ADDRESS_STYLE' and ensure that the country you are adding exists as a lookup code for this lookup type.
19. If your country does not exist, then create an entry for the country you have included in the flexfield definition.

1.7 Defining Profile Options

During implementation, you set a value for each profile option to specify how Oracle Customer Care controls access to and processes data. Generally, the system administrator sets and updates profile values. For additional information, see: Setting User Profile Options, Oracle Applications System Administrator's Guide.

The table below lists all profile options related to Customer Care.

The first column provides the name of the profile option and a description. The second column lists a default value, if applicable. All profile options are required unless otherwise noted.

Customer Care: Critical Customer Check Profile Check used to determine criticality of customers	Critical Customers
Customer Care: Default Outcome for Interactions Default outcome for Interactions and Activities in Contact Center **Note**: See Appendix B for further information about this profile	Incoming
Customer Care: Default Party Type Default value in Caller Type field in Contact Center	Organization
Customer Care: Default Reason for Interactions Default reason for Interactions and Activities in Contact Center **Note**: See Appendix B for further information about this profile	Too Busy

Customer Care: Default Relation for Person	Employee
Default value in the Relation field of Caller Information window	
Customer Care: Default Result for Interactions	Message not Sent
Default result of Interactions and Activities in Contact Center	
Note: See Appendix B for further information about this profile	
Customer Care: Default Tab for Contact Center	Dashboard
Default navigation tab that is open when Contact Center form is opened	
Customer Care: Default Territory for Contact Center	United States
Default value in Country field when an address for a party is entered in Caller Information window	
Customer Care: Install Base Form Check	Customer Products
Identifies which Install Base window opens when Installed Base button is clicked in Contact Center	
Customer Care: Log Task Activities Flag	Yes
Sets the flag to control logging of Interaction Activities for Tasks	
Customer Care: Number of Interactions displayed in Contact Center	3
Customer Care: Service Request Form Check	Enter Service Requests
Identifies which Service Request window opens when the Details button is clicked in the Service Request tabbed page of Contact Center	
Customer Care: User Currency Code	US Dollar
User currency code used for multi-currency conversions	
ContactCenter: New Contact default Create Account	No
Specifies whether the Create Account check box in the Caller Information window is selected by default	
ContactCenter: New Contact default address type	Bill to
Specifies the address type that appears by default in the Address Type field of the Caller Information window	
ContactCenter: New Contact default phone type	WORK
Specifies the default value that appears in the (Phone) Type field in the Caller Information window	
CSC: Oracle Scripting Three Tier Installation (obsolete)	
Specifies whether the environment is setup for two or three tier scripting	
CSC: Port for Oracle Scripting Application (obsolete)	
Specifies port to use to communicate with scripting server	

CSC: SID of Oracle Scripting Database (obsolete)

SID of the database used to support the scripting tool

CSC: Server Machine for Oracle Scripting (obsolete)

Name of host machine on which the scripting server resides

Note To use Scripting, please refer to the *Oracle Scripting Implementation Guide* and the *Oracle Support Implementation Guide*..

A

Enabling Relationship Plans

This appendix details the necessary steps involved in integrating any application within CRM to the relationship plans module in Customer Care. Integration can be achieved by coding one or more of the following form level triggers in the integration form:

1. On Insert
2. On Update
3. Custom1
4. Custom2

A.1 Overview of Enabling Relationship Plans

Modules within the CRM application need to be integrated with each other to ensure smooth flow of data and business logic through out the application. The relationship plans module within Oracle Customer Care allows organizations to set up plans that they can offer to their customers and ensure a constantly growing customer base.

The relationship plans module is a busy point of integration, because of the very fact that almost every other module within CRM needs to have a consistent view of all the existing plans in the application. To help in this integration process, the relationship plans module facilitates an "ENABLE PLAN" form, which enables other modules to integrate with relationship plans.

A.2 Technical Overview of Enabling Relationship Plans

A.2.1 List of forms used:

CSCUTILS.fmb - Setup Form and Outcomes Window

A.2.2 List of tables used:

CSC_PLAN_ENABLE_SETUP

OKC_PROCESS_DEFS_V

A.2.3 List of packages and procedures:

```
PACKAGE CSC_PLAN_OUTCOMES
PROCEDURE GET_OUTCOMES (
    p_FUNCTION_ID                   NUMBER,
    p_TRIGGER_EVENT                 VARCHAR2,
    p_PARTY_ID                      NUMBER,
    p_CUST_ACCOUNT_ID               NUMBER,
    p_CUST_ACCOUNT_ORG_ID           NUMBER ,
    p_APPLICATION_SHORT_NAME        VARCHAR2,
    p_MSG_TBL                  OKC_AQ_PVT.MSG_TAB_
TYP )
```

Description of Parameters:

1. P_FUNCTION_ID - The integrating form function id from table FND_FORM_FUNCTIONS
2. P_TRIGGER_EVENT - The triggering event that calls the outcomes. The allowed values are INSERT, UPDATE, CUSTOM1 and CUSTOM2.
3. P_PARTY_ID - Party Id from HZ_PARTIES .
4. P_CUST_ACCOUNT_ID - Customer account Id from HZ_CUST_ACCOUNTS_ALL
5. P_CUST_ACCOUNT_ORG_ID - Customer account Org Id from HZ_CUST_ACCOUNTS_ALL

6. P_APPLICATION_SHORT_NAME - The short name of the application from FND_APPLICATION.
7. P_MSG_TBL - The msg_tbl has the following structure:
   a. ELEMENT_NAME VARCHAR2(4000)
   b. ELEMENT_VALUE VARCHAR2(4000)

   The element name is the name of the action attribute element name. The element value is the actual value of the element name.

A.3 Prerequisites

1. Relationship Plans have to be defined and attached to the specific customer.
2. Actions, Conditions and Outcomes have to be defined using the Events screens.

A.4 Steps to Enable Modules in Relationship Plans

1. Register the integrating module form with the relationship plan's setup form.
2. Attach library CSCUTLS.pll (from $CSC_TOP/resource) in integrating form.
3. Subclass relationship_plans_outcomes and enable_relationship_plans object groups from the CSCUTILS.fmb form (from $CSC_TOP/forms/US).
4. Call CSC_PLAN_OUTCOMES.GET_OUTCOMES procedure from all of the above mentioned form level triggers. The outcomes are fired only for triggers that are enabled in the setup form.
5. Add the following code to the APP_CUSTOM package body in the integrating form:

   if (wnd='OUTCOMES') then

   cscutils_app_custom.close_windo('OUTCOMES');

   --move focus to required block/field. for eg:

   GO_BLOCK('t**arget block**');

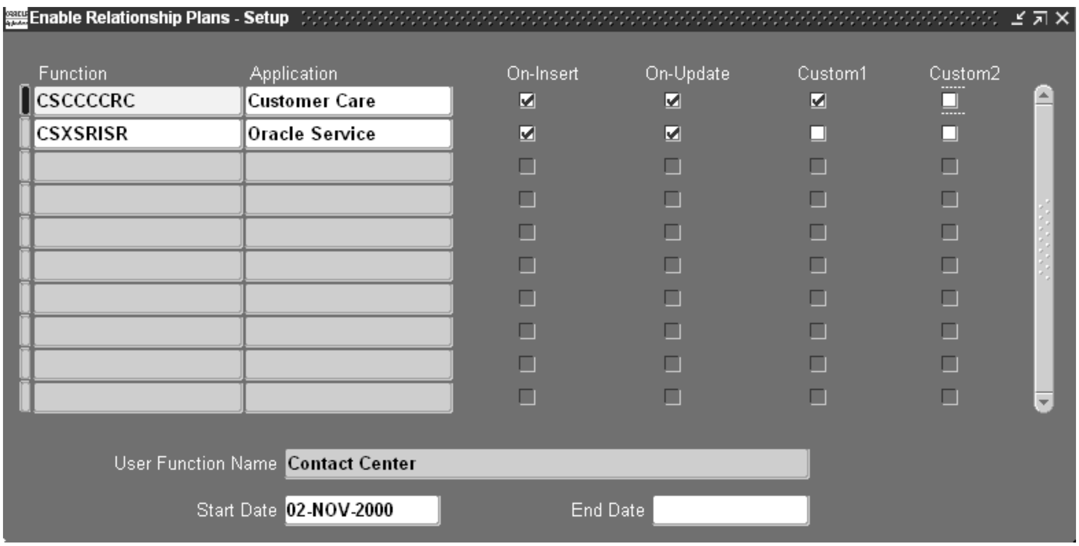
   end if;
6. User defined triggers, Custom1 and Custom2 have to be explicitly executed from the required integration point. Following is an example:

execute_trigger('CUSTOM1');

A.5 Functionality of the Setup form - CSCUTILS

A.5.1 Enable Relationship Plans - Setup Window:

To enable a module for relationship plans, the module should register its form functions with the relationship plans registering table called CSC_PLAN_ENABLE_SETUP. This can be done via the Enable Relationship Plans - Setup form, which is shown below:



The Function column specifies the integrating form function name.

The Application column specifies the application the form function belongs to.

The integrating module has four form level triggers which can be coded to achieve integration with the relationship plans module. They are:

1. On Insert
2. On Update
3. Custom1

4. Custom2

By checking one or more of these triggers, the enable plan APIs can be executed from the integrating module.

A.5.2 Outcomes Window

Outcomes of a plan can be of two types - synchronous and asynchronous. Asynchronous outcomes are those that are fired immediately but the resulting outcomes are processed in the background. Synchronous outcomes are those which are fired immediately and the results are shown in the outcomes window. The user can then select or deselect the outcomes and execute or cancel them.

Outcome Name if the name of the outcome.

Outcome Type is the name of the outcome type, such as Alert or Script.

Description is the description of the outcome, such as the alert text for Alerts.

The Execute button executes the outcome.

The Cancel button closes the Outcome window.

A.5.3 Defining an Alert

1. Create a message with the alert text as the message text. This is the same as defining an error message.
2. Define the outcome in the Process Definition screen. Use the same message name defined in step 1 for the outcome name.
3. Define the parameters for the outcomes. Use the same message token names defined step 1 as the parameter names.
4. For more information about defining outcomes, refer to Events documentation.

A.6 Limitations

Defining a plan which has only one outcome to be fired raises no issues. The outcome is fired and the control passes on normally to the next logical step. If there are two or more outcomes to be fired, the control passes to the 'OUTCOMES' block which lists the different outcomes and the user can select which of the outcomes are to be executed. This raises a potential error situation if the enable relationship plans triggers are called from triggers that do no allow restricted procedures to be part of their code. This is due to the fact that there is a 'GO_BLOCK' statement executed in the GET_OUTCOMES program unit when transferring control to the OUTCOMES block to display the various outcomes.

It is mandated that the form functions integrating with the Relationship Plans module takes into account the above situation and performs the right code calls. A workaround for the above scenario would be to create a Timer and then execute the Enable Relationship plan trigger from the 'WHEN-TIME-EXPIRED' trigger.

B

Outcome-Result-Reason Profile Options

New rules have been formulated for Outcome, Result, and Reason. The rules state that for every outcome you can have multiple results and for every result you can have multiple reasons which can be linked to one another. The list of values for outcome, result, reason are filtered in the Call Wrap Up window depending upon the links established between them. The Call Wrap Up window can be invoked from the Contact Center by clicking the Call Wrap Up button.

This new rule for Outcome-Result-Reason comes into effect from minipatch #21(1784002). Please ensure that the current default Outcome-Results-Reason profile values are linked to one another. This can be done using the "Interaction History Administration" screen

B.1 Steps to link Outcome-Result-Reason Codes

Perform the following steps to link Outcome, Result and Reason codes.

1. Note the existing values for the following profile options:

- Customer Care: Default Outcome for Interactions
- Customer Care: Default Result for Interactions
- Customer Care: Default Reason for Interactions

2. Establish relationships between these profile values in the Interaction History Administration window. Open the Interaction History Administration window using the following navigation path:

   Setup > Customer Management > Interaction History Administration

3. Open the Outcome - Results Tab
4. Establish relationships between Outcome and Results from the list of values.

5. Save your changes.
6. Open the Result - Reasons tab
7. Establish relationships between Results and Reasons from the list of values.
8. Save your changes.
9. Exit out of the window.