

Oracle[®] CRM Application Foundation

Concepts and Procedures

Release 11*i*

May 2001

Part No. A90316-01

ORACLE[®]

Oracle CRM Application Foundation Concepts and Procedures, Release 11i

Part No. A90316-01

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Glossary

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

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Preface

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

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

This preface explains how the Concepts and Procedures guide is organized and introduces other sources of information that can help you.

Intended Audience

This guide is aimed at the following users:

- Oracle CRM business users
- Customer Service Representatives
- Field Service personnel
- System Administrators

This guide assumes that you have the following prerequisites:

- Understanding of the basic company business processes
- Knowledge of products and services as defined by your marketing policies

Structure

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

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

"Using" topics provide process-oriented, task-based procedures for using the application to perform essential business tasks.

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

Related Documents

For more information on Oracle CRM Application Foundation, see the following manuals:

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

Other Sources of Information

For additional information regarding the Oracle E-Business Suite, consult the following:

- *Oracle Application Product Update Notes, Release 11*
- *Installing Oracle Applications, Release 11*
- *Maintaining Oracle Applications, Release 11*
- *Oracle Application Concepts*
- *Oracle Applications System Administrator's Guide*
- *Implementing Oracle CRM: ERP Functional Flows*
- *Implementing Oracle CRM: Foundation Functional Flows*

In addition, Oracle offers several relevant courses through Oracle University:

- 11i Use and Administer Oracle CRM Foundation
- 11i Implement Oracle CRM Foundation

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JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Understanding Territory Manager

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

This section covers the following topics:

- [Territory Management Overview](#)
- [Terms and Definitions](#)
- [Basic Territory Building Blocks](#)
- [Different Ways of Creating Territories](#)
- [Territory Hierarchies](#)
- [Territory Winning Rules](#)
- [Sample List of Predefined Territory Qualifiers](#)
- [Understanding the Territory Details Window](#)
- [Territory Manager Process Flow](#)

Territory Management Overview

The following topics describe what Territory Manager is and when and why you use it:

- [What is a Territory?](#)
- [What is the Territory Manager?](#)
- [What is the Territory Lookup Tool?](#)

What is a Territory?

A territory is an organizational domain with boundaries defined by attributes of customers, products, services, and resources.

Territories can be created on multiple criteria including postal code, area code, country, vertical market, size of company, and product expertise. It can be created based on geographical locations, for example, East Coast and West Coast territories. It can also be based on customer name if targeting specific customers or products, for example, Business World territory, or the combination of both geographical location and customers, such as a West Coast Business World territory.

What is the Territory Manager?

Territory Manager provides user interfaces and functionality that organizations can use to manage territories.

Use Territory Manager to automatically assign sales and service teams based on their availability and expertise. Also use it to make sales, and service information more secure by restricting personnel access to customer data.

Most sales and service territories are one dimensional. They can assign tasks to employees based on:

- postal code
- area code
- country
- vertical market
- size of company
- product expertise

Territory Manager makes it possible for you to create multidimensional territories using a number of such criteria.

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

You can create multiple such territories for individuals or for teams of sales and service representatives. Think of Territory Manager as a high-level programming tool that determines the assignment of tasks and resources within your company.

What is the Territory Lookup Tool?

Many Oracle Sales users need to have the ability to lookup territories and the representatives assigned to those territories (which have been defined for Oracle Sales and Telesales.) The Territory Lookup Tool allows these users to view the appropriate sales representatives that have been assigned to specific territories.

The Territory Lookup Tool has a dynamic window format that requires no customizing. It dynamically displays the account qualifiers for sales that are selected in Territory Manager. You can enter criteria in fields that are enabled qualifiers.

See Also

[Basic Territory Building Blocks](#)

[Different Ways of Creating Territories](#)

Terms and Definitions

The following table describes Territory Manager terms and definitions.

Territory Manager Terms and Definitions

Term	Description
Automatic Assignment	Automatic Assignment refers to the matching of territories to resources resulting in a “Winning Territory”
Catch All	A Catch All territory is a placeholder used at the top of a territory hierarchy when no other has been defined.
Effective Dates	The date a territory, member assignment, and so on, is effective, or to be in use.
Escalation Territories	<p>Escalation territories provide you with the ability to define the escalation path in the event of exceptions. This is necessary for all administrative purposes and accountability purposes.</p> <p>Territory based escalation definition will provide you with the multi-level escalation path for each territory.</p> <p>When defining a territory, the user has the option of designating the escalation territory. An escalation territory must be defined with the escalation flag checked before it will be present in the Escalation LOV.</p>
Number of Winners	The Number of Winners field is used to specify the maximum number of potential winning territories.

Territory Manager Terms and Definitions

Term	Description
Operators	Operators refer to the ability to use arithmetic operators. While defining territories, the qualifier values should be either discreet using operators (for example, <, >, =<>, <=, >=, LIKE, or a range using BETWEEN.
Qualifiers	Qualifiers are used to define Territories.
Dynamic Mode (Default)	Dynamic qualifiers are used to control the number of territories after creating a mass number of territories. The values of both transaction and resource dynamic qualifiers are exclusively mixed together while assigning them to the new territories.
Static Mode	Static qualifiers are used to transfer the qualifier's values to every new territory no matter if it is a transaction or a resource qualifier after territory mass creation. Therefore, you can treat the values of the static qualifiers as the required values for every new territory.
Rank	Rank is used to specify the priority of a territory among territory random selection.
Resource Qualifiers	Resource Qualifiers are the criteria used specifically in selecting resources.
TAE	Territory Assignment Engine. After territories are defined, each module can call a standard API to get a set of qualifying employees for a transaction. The API in turn calls the Territory Assignment Engine to figure out the qualified Territories that are returned to the API, which then figures out the qualifying resources.
TM	Territory Manager. This is used as a tool that helps manages territories.
Territory	A territory is an organizational domain with boundaries defined by attributes of customers, products, services, and resources.
Territory Administrator	This person administers the specific and periodic duties of Territory Manager. See Getting Started .
Territory Templates	A territory template is used to create many similar territories simultaneously. They can be based upon territory types. Whenever a new set of territories needs to be generated, a template can be used. (Optional)

Territory Manager Terms and Definitions

Term	Description
Territory Type	Territory Types are used to group transaction qualifiers when creating territories. In usage, territory types are based on the specific business need. Consequently, territory types can be defined to organize the business. Types are also able to be based on usage, such as, Marketing, Sales, and Service. A territory type can be based also upon customer and product. Another example can include customer type and location.
Top-level Territory	A top-level territory is a territory that has the "Catch All" as a parent.
Transaction Qualifiers	Transaction Qualifiers are the criteria used to determine the winning territory.

Basic Territory Building Blocks

Use the following basic building blocks to define a territory:

- [Qualifiers](#)
- [Territories](#)
- [Territory Types](#)
- [Territory Templates](#)
- [Escalation Territories](#)

Note: When creating a territory, you may not need all of the building blocks. You can create a stand-alone individual territory by entering territory qualifiers and their values directly, without using a territory type, a territory template, or an escalation territory.

Qualifiers

The following section describes qualifiers in detail:

- [Qualifier Components](#)
- [Transaction Qualifiers](#)
- [Resource Qualifiers](#)

- [Using Qualifiers](#)
- [Seeded Qualifiers](#)

Qualifier Components

There are two types of qualifiers that help define a territory: Transaction Qualifiers and Resource Qualifiers.

A qualifier also consists of three components: name, operator, and value.

The following table describes each component:

Qualifier Components

Components	Description
Name	The name of the qualifier. It can be postal code, item, task priority, request status, and job title.
Operator	Use operator to connect a qualifier name and its values to make a qualifier meaningful. The operator's list of values (LOV) depends on the data type of the qualifier. Possible values are =, < >, >, <, >=, <=, Like and Between. The default value for this field is "=".
Value	The selection from the LOV in this field is based on the selected qualifier. For example, the LOV for the request status qualifier can be Open or Closed. If the qualifier is area code, then manually enter this field, for example, 408, 415, and so on.

Transaction Qualifiers

Transaction Qualifiers are used to specify the criteria about how the territory module assigns resources to transactions. It is the first key decision point when Assignment Manager tries to assign resources to a document or a task.

For example, use area code, postal code, company name, or opportunity channel as the criteria to help assign qualified resources for transaction needs.

Different territory usages, like Oracle Sales or Service, use different sets of transaction qualifiers and those transaction qualifiers are grouped by transaction type. For example, a sales or telesales territory has three predefined transaction types: Account, Lead, and Opportunity. Some examples of transaction qualifiers within the Account Transaction Type are company name, area code, and postal code. Opportunity channel is one transaction qualifier for the Opportunity Transaction Type.

Note: You must enable existing transaction qualifiers before using them.

Resource Qualifiers

Resource Qualifiers specify what attributes are used to select the individuals responsible for those transactions. Examples include job title, competence, and language. These qualifiers act as filters which define resource selections.

For example, if you are looking for specific resources who speak Italian for your customer needs, then the resource qualifier can be identified as "Language = Italian." This aids in selecting resources that qualify for your condition.

You can still make selections from the qualified resources suggested by the resource qualifier before assigning them to a territory.

Note: There is no need to specify the resource qualifiers if you know exactly what resources are needed for a certain territory. Instead, identify the resource names on the Resource tab of the Territory Details window.

Using Qualifiers

Why use Transaction and Resource Qualifiers?

After understanding the concepts of transaction qualifiers and resource qualifiers, it is easier to understand how a territory works. A territory uses resource qualifiers to filter resources that you want to attach to a territory. A territory uses transaction qualifiers and values to determine if a territory can win in that transaction. If the territory happens to win, then the resources attached to the territory can be assigned to the transaction.

Seeded Qualifiers

Territory Manager provides a large number of seeded qualifiers for Defect Management, Sales and Marketing, Service, and Trade Management.

Territories

A Territory consists of qualifiers and their values. You can create a territory individually or you can create a large number of territories all at the same time using a territory template.

Suppose your company wants to finalize a business transaction with Business World Inc. and that it also requires a manager position to close the deal. A territory is set up with two qualifiers: "Customer Name = Business World Inc." and "Job Title = Manager" for this one time deal. You do not need to use any of the existing Territory Type or Territory Template for this territory creation. You can add an escalation territory later with a different manager who has a superior record for handling complex cases if the assigned manager is not able to close the deal.

The territory creation process can use some or all of the following basic building blocks:

- Escalation Territories
- Territory Templates
- Territory Types

See Also

[Different Ways of Creating Territories](#)

Territory Types

A Territory Type is a grouping of transaction qualifiers. Without setting qualifier values, you can use it to simplify and systematize the territory creation process. Use territory types to group transaction qualifiers used for creating territories. This saves time when creating similar territories.

Suppose you want to create territories by geographical area. In this case, create a territory type with the Country and Postal Code qualifiers.

Note: Plan your territories and enable existing transaction qualifiers before creating territory types.

Territory Templates

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

Escalation Territories

An escalation territory provides the resources responsible for managing escalations.

You use Escalation territories to define the escalation path with appropriate resources that the escalation owner identified for the territory in the event of exceptions. In case of automatic assignment by using an escalation territory, the Assignment Manager is used in conjunction with the Territory Manager. The escalation can be automatically assigned to an owner if the escalated document (like service request, tasks, or defect) has an escalation territory defined.

You can create alternate escalation territories to automatically reassign a service call when certain conditions are not met.

- a. A repair team assigned to a repair does not take action within five business days, so now that repair can be assigned automatically to another group.
- b. A service engineer cannot service a request within a certain time frame which is set up in the Business Rule Monitor (BRM), so now the service request will be automatically escalated to the resource.

Different Ways of Creating Territories

You can create territories in one of three ways:

1. [Individually](#)
2. [With a territory type](#)
3. [With a template](#)

Creating Individual Territories

Create a standalone territory by entering territory qualifiers and their values directly. This method does not leverage your work because you have to add both qualifiers and their values for each territory you create.

Creating a Territory Using a Territory Type

Create territories using a territory type in a two step process:

- Create the territory types by adding chosen transaction qualifiers.
- Use territory types to create territories.

Use this method for creating multiple territories with similar characteristics. Using territory types to create territories saves time because you do not have to add

qualifiers to each individual territory, but you still have to create each individual territory separately by entering values for the qualifiers.

Note: You must use territory templates to create territories if you plan to use resource qualifiers. Territory types limit you to using transaction qualifiers only.

Creating a Territory Using a Territory Template

Create a large number of territories all at the same time using a territory template.

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

Territory Hierarchies

The purpose of having territory hierarchies is to make the territory assignments and searches more efficient. Territory hierarchies also have the ability to store the parent-child relationship among territories.

Parent-Child Territory

Any territory consisting of one or more subterritories is considered as a parent territory. For example, a West Coast territory could consist of three subterritories: Washington, Oregon, and California. This West Coast territory and the three subterritories have the parent-child relationship.

Features of a Child Territory (Subterritory)

To help maintain integrity in the hierarchy, each child territory logically inherits the qualifiers and values of the parent territory. Also, additional qualifiers and values can be added.

Territory Winning Rules

Territory Manager uses the Number of Winners field set to the top level of territory hierarchy to determine the winning territories. This field cannot be entered if it is not the top level territory.

Territory winning rules are used in several different ways in the Oracle E-Business Suite. For example, Oracle Service tends to enter ONE in the Number of Winners field, which helps to select the most qualified resources for the service requests.

Multiple winners are commonly used in Oracle Sales to meet the business needs, but a single winner is also used in Sales. If the Number of Winners field is not set, then the number of winning territories defaults to one for the hierarchy under that top-level territory.

There are two possible outcomes based on values entered in the Number of Winners field:

- [One Winner](#)
- [Multiple Winners](#)

One Winner

If you enter 1 in the Number of Winners field in the Overview tab, then Territory Manager assigns the transaction to a single territory in the territory hierarchy.

Use the territory ranking mechanism for breaking ties between winning territories. The lowest rank of competing territories wins against the higher rank of the territories in the territory hierarchy.

Multiple Winners

If you enter a number greater than 1 in the Number of Winners field in the Overview tab, then Territory Manager assigns a transaction to multiple qualifying territories.

Use the Number of Winners field to limit the number of winning territories. However, if there are three territories that qualify for the criteria, but it can only have two winners, then ranking determines the final two winners among the three territories.

Note: Only the territory that has resources attached can be a winning territory.

Sample List of Predefined Territory Qualifiers

Territory Manager includes pre-defined qualifiers for the following CRM modules:

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

Below is a small sample of both resource and transaction qualifiers.

Example of Predefined Territory Qualifiers

Application Type	Qualifier Type	Qualifier Name
Defect Management	Defect Transactions	Product
Sales	Account	Customer Name Range
Trade Management	Trade Account	State
Service	Service Request	Request Type

See Also

[Viewing Transaction Qualifiers](#)

Understanding the Territory Details Tab

The table below describes the different tabs available in the Territory Details Windows.

Territory Details Window Tabs

Tab	Description
Overview Tab	Use this tab to enter basic territory information including name, description, effective dates, and crucial information like rank, number of winners, and transaction types.

Territory Details Window Tabs

Tab	Description
Transaction Qualifiers Tab	Specify transaction qualifiers and their values for a territory.
Resource Qualifiers Tab (Optional)	Use this tab to specify resources qualifiers and their values. It is not mandatory to enter resource qualifier information if you know exactly what resources you want to use in a territory.
Resources Tab	Use this tab to specify resources manually or click the Auto Assign Resources button to display and select qualifying resources based on resource qualifiers and their values defined in the Resource Qualifiers tab.
Subterritories Tab (Optional)	Use this tab when a territory hierarchy includes territories below the current territory. Click New Subterritory and repeat the territory creation procedure for new subterritories.

WARNING: After creating or modifying a territory, you must run the concurrent program “Generate Territory Package.” This allows the system to compile the business rules defined in the territory creation.

If this step is not completed, changes to territories will not be reflected when the Territory Assignment Engine assigns transactions.

The following sections describes the fields on each tab in detail.

The Overview Tab

The following table describes the functionalites of the fields on the Overview tab in the Territory Details Window.

Overview Tab

Field	Description
Usage	Describes the usage of this territory. For example, this territory is used for Oracle Service. The usage limits the selection of transaction types.
Escalation	Leave this field blank if an escalation territory is not required.

Overview Tab

Field	Description
Transaction Types	<p>The transaction type is based on the territory usage. For example, Service Request and Task are the transaction types for Oracle Service. Account, Lead and Opportunity are used by Oracle Sales and Telesales.</p> <p>The selection of transaction qualifiers is based on the transaction type. For example, task type, status and priority are transaction qualifiers of Task transaction type for the usage of Service application.</p> <p>To enable existing transaction qualifiers, select Setup Qualifiers from the Administration pull-down menu.</p>
Type	<p>Select the territory type if you want to create multiple territories with similar characteristics.</p> <p>Once the territory type is selected, the names of the Transaction Types fields and the transaction qualifiers on the Transaction Qualifiers tab populate automatically because the territory type is a group of transaction qualifiers, and the transaction qualifiers are based on the transaction type. You only need to assign the value of each transaction qualifier to the territory you are going to create on the Transaction Qualifiers tab.</p> <p>You cannot select the territory type if the transaction types are selected first because the transaction types override the territory type. The (territory) Type field is blocked out.</p>
Number of Winners	<p>Specify the number of winners only at the top level of a territory hierarchy, such as the top level territory directly under Oracle Service. This field is protected if it is not the top level territory and an error message appears.</p>
Rank	<p>Specify the territory ranking information. The lowest rank of competing territories wins at the same level in the hierarchy.</p>
End Date	<p>Use this field to obsolete a territory. This field is not mandatory.</p>
Template	<p>This field displays the template name if you create a territory using a template.</p>
Freeze	<p>Once this field is checked, the territory cannot be updated any more. You cannot uncheck this field after it is checked. Once this is checked, the territory can only be deleted.</p>
Copy Territory	<p>Used to duplicate an existing territory. To duplicate an existing territory including the entire hierarchy, click the Copy Territory button. A Copy Territory window opens and you can check the Copy Hierarchy check box.</p>

Opportunity, Lead, Task, and Service Request are considered a super set of the Account qualifiers. Therefore, the account related transaction qualifiers, such as Postal Code and State, are available even if the account transaction type is not selected for the territory usage of Oracle Sales or Telesales.

WARNING: Be cautious while using the Freeze check box. It is suggested that you leave this freeze box unchecked at all times unless it is necessary. You cannot undo a Freeze.

The Transaction Qualifiers Tab

The following table describes the functionalities of the fields on the Transaction Qualifiers tab in the Territory Details Window:

Transaction Qualifiers Tab

Field	Description
Name	<p>The available transaction qualifiers are based on the transaction types and usage defined in the Overview tab. Enter the qualifiers manually if you create a territory without a territory type.</p> <p>If you cannot find the transaction qualifiers or return no values from the list of values (LOVs) then enable them from the Setup Qualifiers window.</p> <p>Use the wildcard blind query “%%” to bring up the LOV in the Value From and Value To fields if you want to list the entire LOV for the selected qualifier. Otherwise, enter at least three letters, such as “Bus”, to launch the LOV for “Business.”</p>
Allow Overlap	<p>The default value for this field is checked. If you do not want to allow overlap for a qualifier, uncheck the Allow Overlap check box. Allowing overlap enables you to assign overlapping territory values to the same qualifier.</p> <p>By enabling overlap, you can enter both ranges as values for the qualifier. With overlap not allowed, you cannot use any of the values within both ranges for a territory at the same level in the hierarchy.</p> <p>If checked the Territory Manager prevents you from entering the second range of values for the qualifier. However, you can use the values as the qualifier for the next level down or up.</p>
Next Value Set	<p>This button is used only in territory template and if the qualifier is in dynamic mode.</p>

Transaction Qualifiers Tab

Field	Description
Mass Create Territories	Specify the template name in the Overview tab and use this button for large numbers of territory creation.
Show Inherited Qualifiers	If this territory is part of a hierarchy of territories, click this button to see which qualifiers this territory logically has inherited from its parent territories.

WARNING: You must enter transaction qualifiers and values in a territory so that it can be considered when a transaction is assigned. If you do not specify transaction qualifiers in a territory, then the resources attached to the territory will not be assigned to any transactions.

The Resource Qualifiers Tab

Unlike the transaction qualifiers, the availability of the resource qualifiers is not limited to the usage and transaction types you choose for a territory.

Enter the resource qualifiers you are going to use if you need assistance in assigning resources to a territory. For example, use “Job Title = Manager” to help you identify resources with manager title. There is no need to use this tab if you know exactly which resources are going to be used for a territory.

The following table describes the functionalities of the fields on the Resource Qualifiers tab in the Territory Details Window.

Resource Qualifiers Tab

Field	Description
Name	Enter the Name of the Resource or use the list of values (LOVs) to populate the field.
Type	Automatically populates based on the name of the resource qualifier.
Next Value Set	This button is used only in territory template and if the qualifier is dynamic mode.
Operator	Use this field to connect a qualifier name and its values to make a qualifier meaningful.

Resource Qualifiers Tab

Field	Description
Value From	This field is based on the Name entered. There is also an LOV list to choose from.
Value To	Field is dependent on the Operator chosen.
Mass Create Templates	Use this button to create a large numbers of territories at the same time. Specify the template name in the Overview tab before clicking this button.

The Resources Tab

Only territories that have resources attached can be winning territories. Therefore, when a resource is added to a territory for the first time, you must run the "Generate Territory Package" concurrent program.

Resources assigned to territories can be any CRM resource defined in the Resource Manager, for example, employees, salespeople, groups, teams, parties, partners, and supplier contacts. If you know exactly which resources are going to be assigned to a territory, then it's not necessary to use the Resource Qualifiers tab to limit the resources.

The following table describes the functionalities of the fields on the Resources tab in the Territory Details Window.

Resources Tab

Field	Description
Name	Enter the Name of the Resource or use the list of values (LOVs) to populate the field.
Type	Automatically populates based on the name of the resource qualifier.
Group (Located on the horizontal scroll bar.)	Specifies which groups the resource belongs to.
Role (Located on the horizontal scroll bar.)	Specifies which roles the resource is assigned to.

Resources Tab

Field	Description
Access Type	<p>Specifies the transaction type for each individual resource assigned to a territory. If this field is blank, then the resource assigned to a territory can access every transaction type listed in the Overview tab.</p> <p>For example, if the selected access type for John Doe is Service Request, then John can only be assigned to a job related to service request. He cannot be assigned to a task or a task through service request.</p>
Auto Assign Resources	Select the Auto Assign Resources button to view all qualifying resources that match the Resource Qualifiers.
Full Access (Located on the horizontal scroll bar.)	<p>This field is only used by Sales and Telesales. If selected, the resource has the full access to the transaction type specified in the Access Type field.</p> <p>For example, if the access type is Lead, the resource can only be assigned to Lead and Account. The person cannot be assigned to an Opportunity.</p>
Primary Contact (Located on the horizontal scroll bar.)	Select this box for the primary contact if you have more than one resource identified.
Start Date and End Date (Located on the horizontal scroll bar.)	Specify the resource available dates.

If you cannot find any people in the Qualifying Resources window, then go back to the Resource Qualifiers tab and either enter a different set of resource qualifier values or select resources manually on the Resources tab.

Note: Auto Assign Resources is functional only if the resource qualifiers and their values are entered in the Resource Qualifiers tab.

The Subterritories Tab

Use the Subterritories tab when your territory hierarchy includes territories below the current territory. This tab helps you create subterritories, also called child territories.

The parent territory field populates automatically after clicking the New Subterritory. For example, you create a subterritory by clicking this button from the Bay Area - South territory, then Bay Area - South becomes the parent territory of this new subterritory.

The following table describes the functionalities of the fields on the Subterritories tab in the Territory Details Window:

Subterritories Tab

Field	Description
Start Date	Enter the start date.
End Date	Enter the end date.
Rank	Enter the rank.
New Subterritory	Select this button to create a child territory with all the attributes of the parent. It repeats the territory creation procedure for the new subterritory.

Territory Manager Process Flow

Before using the Territory Manager, your territory planning team must analyze your business and organization needs for better territory planning and future management. This step should be in place before implementing the Territory Manager.

The implementation team enables seeded qualifiers used in your territories based on the planning decisions.

The territory administrator then begins the territory creation process, according to the territory plan, using the concept of basic territory building blocks. This territory creation process may use different ways to create territories either with or without using templates or types. It can include the use of escalation territories to help manage future escalations.

After territories have been created, you can search and view territory hierarchies through either the Administration menu or the Navigator tree. The territory administrator must run the “Generate Territory Package” concurrent program to generate correct territories with changes reflected before calling modules assign resources defined in your territories.

The following table describes the order and process of implementing, using, and administering the Territory Manager.

Territory Manager Process

Steps	Description	Required	Owner
Territory Planning	Analyze the territory setup in your organization before utilizing Territory Manager. You need enterprise-wide cooperation and feedback. You must expect to make multiple territory revisions in the early months of operation as your enterprise discovers omitted information or territories that do not work on a day-to-day basis.	Yes	Management, Implementor, Territory Administrator
Enable Qualifiers	Use qualifiers as the criteria to delineate a territory.	Yes	Implementor
Create Territories	Create territories for a variety of transactions. For example: account, lead, opportunity, and service requests.	Yes	Territory Administrator
Create Templates	Use a territory template to create many similar territories at the same time.	Optional	Territory Administrator
Create Types	Create territory types to form a grouping of transaction qualifiers that can be used to simplify and systematize the territory creation process.	Optional	Territory Administrator
Create Escalation Territories	Use escalation territory to create alternate territories where transactions such as a sales lead or service call is automatically reassigned when certain conditions are not met. It defines the teams that handle escalations. It is limited to identifying resources.	Optional	Territory Administrator
Create Customer Name Range Group	Create, modify, or delete an existing name of a group and it's children.	Optional	Territory Administrator
Create Mass Change Territory Resources	Use this tab to mass transfer territory allocations from one resource to another.	Optional	Territory Administrator
Run Concurrent Program	Run the concurrent program "Generate Territory Package" after creating or modifying your territories. This allows the system to compile the business rules defined during territory creation. If this step is not completed, the territories will not work correctly.	Yes	Territory Administrator

Territory Manager Process

Steps	Description	Required	Owner
Search and View Territories	Search and view territories based on various criteria. You do not need to run the Concurrent Program to search or view Territories.	Optional	All users
Territory Lookup Tool	Use this HTML based window to search for sales reps. The winning territory is based on the Territory setup and search criteria selected. It searches down the territory trees to find the winning territory.	Optional	All users
Run Reports	Run reports to track your selections and changes. There are two types of reports you can generate in either HTML or export to Microsoft Excel: <ul style="list-style-type: none">■ Territory Definition Report■ Territory Changes Report	Optional	All users

See Also

[Using the Territory Details Window](#)

Using Territory Manager

This topic group provides process-oriented, task-based procedures for using the application to perform essential business tasks. The following topics are generally performed by all users.

This section covers the following topics:

- [Getting Started](#)
- [Using the Territory Lookup Tool](#)
- [Accessing the Territory Manager](#)
 - [Viewing From the Tree Navigator Window](#)
 - [Viewing From the Administration Pull-Down Menu](#)
 - [Viewing Transaction Qualifiers](#)
 - [Viewing Territory Templates](#)
 - [Viewing Escalation Territories](#)
 - [Viewing Territory Types](#)
 - [Viewing the Navigator](#)
- [Running Reports](#)

Getting Started

Use Territory Manager perform the following tasks:

1. [Using the Look Up Tool](#)
2. [Viewing Territories](#)

3. [Viewing Territory Templates](#)
4. [Viewing Escalation Territories](#)
5. [Viewing Territory Types](#)
6. [Searching the Navigator](#)
7. [Running Reports](#)

Using the Territory Lookup Tool

The Territory Lookup Tool returns the names of the sales representatives attached to the winning territories based on the Territory setup and search criteria. It searches down the territory hierarchy to find the resources of the winning territory.

Perform the following steps to look up a customer's assigned sales representatives.

Prerequisites

- Enable qualifiers
- Create the necessary territories
- Have appropriate responsibilities

Steps

1. Navigate to the Territory Lookup window.
 - Since the Territory Lookup feature can be customized, the navigation path varies depending on client preferences.
 - The Territory Lookup window is dynamically generated, based on the enabled qualifiers in Territory Manager.
2. Enter the value(s) in the search fields and click either **Search** or **Go**.
 - If you click **Go**, then the Select an Organization window appears giving you a detailed list of values (LOV) based on the organization name including: address and organizational name.
 - Select your choice. The Territory Lookup Search Results window appears.
 - If you click **Search**, then the Territory Lookup Search Results window appears with the search results. This is a list of sales representatives that have been assigned to the customer based on the entered criteria.

Accessing the Territory Manager

You can access the Territory Manager in two ways:

- From the territory tree [Navigator window](#)
- From the [Administration pull-down menu](#)

By accessing the Territory Manager, you are able to view and search for territories. Use the Navigator to:

- View the structure of territories in a tree format and create new territories.
- View and modify territory types and the territories created by using them.
- View and modify your created escalation territories.
- View and modify territory templates and the territories created by using them.
- Search for the territory you want to view or modify from the tree structure.

View and modify any item in the tree by double-clicking on it. If this is the first territory you are creating, then select the node of an Application, for example, Oracle Service or Oracle Sales and Telesales applications.

Viewing From the Tree Navigator Window

Perform the following steps to view the navigator window:

Prerequisites

None

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Administration**.

The territory tree Navigator window opens.

2. From the tree Navigator window, use the View By drop-down list to select different territory options in the Navigator.

The territory tree structure (territory hierarchy) reflects the change of your selection.

3. Click on the node that you want to edit, then right-click to select additional options from the menu.

Note: A catch all territory is a placeholder used at the top of a territory hierarchy.

Viewing From the Administration Pull-Down Menu

Perform the following steps to view a territory from the Administration pull-down menu.

Prerequisites

None

Steps

1. From the CRM Administrator responsibility, select **Territory Manager > Territory Administration**.

The territory tree Navigator window opens. This window allows you to access the Administration option menu bar.

2. Select **Administration**.

From this menu you can:

- Enable qualifiers
- Define templates, and territory types
- Create individual or escalation territories
- Define customer name range groups
- Make mass change territory resources
- Perform search functions

Viewing Transaction Qualifiers

Perform the following steps to view the entire list of Transaction Qualifiers.

Prerequisites

None

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Administration**.

The territory tree Navigator window opens.

2. Select **Setup Qualifiers** from the Administration pull-down menu.

The Setup Qualifier window opens.

3. Leave the Usage field blank. In the status area select **All**, then click **Find**.

The Setup Qualifier window is populated with the defined transaction qualifiers including a description, transaction type, and organization.

Viewing Territory Templates

Perform the following steps to view the territory templates.

Prerequisites

None

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Administration**.

The territory tree Navigator window opens.

2. From the View By drop-down list, select **Territory Templates**.

3. To view territory templates effective on a specific date, enter that date in the Date field. The default is today's date.

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

4. Double-click to view or modify a territory template.

The Template Territory Details window opens.

Viewing Escalation Territories

Perform the following steps to view escalation territories.

Prerequisites

None

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Administration**.

The territory tree Navigator window opens.

2. From the View By drop-down list, select **Escalation Territories**.
3. To view escalation territories effective on a specific date, then enter that date in the Date field. The default is today's date.
4. Double-click to view or modify an escalation territory.

The Escalation Territory Details window opens.

Viewing Territory Types

Perform the following steps to view territory types.

Prerequisites

None

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Administration**.

The territory tree Navigator window opens.

2. From the View By drop-down list, select **Territory Types**.
3. To view territory types effective on a specific date, then enter that date in the Date field. The default is today's date.
4. Double-click to view or modify a territory type.

The Territory Type Details window opens.

Searching the Navigator

Perform the following steps to search for territories, territory types, escalation territories, and territory templates.

Prerequisites

None

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Administration**.

The territory tree Navigator window opens.

2. From the Administration menu, choose **Search**.

The Territory Search window appears.

3. From the Search For drop-down list, select the information type:

- Territory
- Territory Type
- Escalations
- Territory Template.

4. In the Basic tab, enter the desired data and click **Search**.

- The results of your search appear in the Search Results field.
- Use the Advanced tab to search for specific qualifier values.

5. To view any of the found items, select the item from the Search results and click **Populate Tree**.

The Navigator opens to your selection.

Running Reports

Users with administration privileges have the ability to run two types of reports:

- [Territory Definition Report](#)
- [Territory Changes Report](#)

Both reports can be viewed online or saved in a spreadsheet format.

Note: If you want to view your report as a spreadsheet, it is faster to verify your selection in HTML and then export it to Microsoft Excel.

Territory Definition Report

Perform the following steps to retrieve specific territory information based on certain criteria, such as a specific resource or a transaction qualifier.

Prerequisites

None

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Reports > Territory Definition Report**.

The Territory Definition Report window opens.

2. Select Output Format from the drop-down menu.
Choose either HTML or Excel.
3. Select Sales Rep from the drop-down menu.
4. Select Qualifiers from the drop-down menu and click **OK**.

Territory Changes Report

Perform the following steps to trace territory change information for a specific period of time.

Prerequisites

None

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Reports > Territory Changes Report**.

The Territory Changes Report window opens.

2. Select Output Format from the drop-down menu.
Choose either HTML or Excel.
3. Enter Earliest Change Date and Latest Change Date and click **OK**.

Administering Territory Manager

This topic group provides administrative procedures required for creating territories and ongoing system maintenance. It also includes information on administration tools and utilities.

This section covers the following topics:

- [Getting Started](#)
- [Creating Individual Territories](#)
- [Using the Territory Details Window](#)
 - [Creating Territory Types](#)
 - [Selecting the Resources for a Territory](#)
 - [Creating Escalation Territories](#)
 - [Entering Qualifier Territories](#)
- [Using a Template to Create a Large Number of Territories](#)
 - [Step 1: Creating A Template](#)
 - [Step 2: Creating Mass Territories With a Template](#)
 - [Entering Static Qualifier Values for Templates](#)
 - [Entering Dynamic Qualifier Values for Templates](#)
- [Creating Geographical Territories Using a Template \(Example\)](#)
- [Creating Customer Name Range Groups](#)

- [Creating Mass Change Territory Resources](#)
- [Tips for Fine-tuning Territory Assignment Performance](#)
- [Running Concurrent Programs](#)

Getting Started

The territory administrator begins the territory creation process. This territory process may use different ways to create territories either with or without using templates or types. It can also include the use of escalation territories to help manage future escalations.

Note: Before setting up all your territories, set up two or three first. Generate the package and test territory assignments to make sure that transactions are correctly assigned. When these few territories work correctly, continue setting up all territories.

The Territory Administrator performs the following tasks:

1. [Creating Individual Territories](#)
2. [Creating Territory Types](#)
3. [Creating Escalation Territories](#)
4. [Using a Template to Create Large Numbers of Territories](#)
5. [Creating Customer Name Range Groups](#)
6. [Creating Mass Change Territory Resources](#)
7. [Running Concurrent Programs](#)

Creating Individual Territories

Perform the following steps to create individual territories with or without using territory types:

1. Create territory overview information with the Overview tab.
2. Select transaction qualifiers using the Transaction Qualifier tab.
3. (Optional) Select resource qualifiers using the Resource Qualifier tab.

4. Select Resources using the Resources tab.
5. (Optional) Create Subterritories using the Subterritories tab.

Prerequisites

There must be a [Territory Plan](#) in place.

Steps

1. From the CRM Administrator responsibility, select **Territory Manager > Territory Administration**.
2. Select **Define Territory** from the Administration pull-down menu.

The Territory Details window opens.

Note: You can also use the Select the Territory from the Tree Navigator that serves as a parent to the new territory and right-click to select New from the pop-up menu.

3. Select the **Overview** tab.
 - a. Use the list of values (LOV) in the Usage field to select the type of application you want to use in this territory. Your selection limits the types of qualifiers that can be used in the territory definition.
 - b. Enter a name and description for the territory.
 - c. To limit the time the territory is effective, enter the Start and End Dates. By default the territory become effective on the date that you create it.
 - d. (Optional) Verify that the parent territory is the territory you selected in the Navigator. If this is not the parent territory, then use the LOV to select the appropriate parent territory.
 - e. (Optional) If you have created an escalation territory for this territory, then enter it using the LOV in the Escalation field.
 - f. (Optional) If you want to use an existing territory type to create this territory, then use the LOV to enter it in the Type field. If you use a territory type, then you are restricted to using the qualifiers set up in that territory type.
 - g. Use the Transaction Types LOV to select one or more types of transactions based on the territory usage. Available values include account, lead,

opportunity, and service request. Note that some application types allow you only one transaction type.

WARNING: Be cautious while using the Freeze check box. It is suggested that you leave this freeze box unchecked at all times unless it is necessary.

4. Select the **Transaction Qualifiers** tab.
 - a. (Optional) If this territory is part of a hierarchy of territories, then click **Show Inherited Qualifiers** to examine which qualifiers this territory has inherited from its parent territory or territories.
 - b. (Optional) If you have used a territory type to create this territory then the qualifiers are already prefilled.
 - c. If you are creating a new territory without a territory type, enter the qualifiers you are going to use in the Transaction Qualifiers region.
 - d. If you want to enter overlapping values for a qualifier, then check the **Overlap Allowed** check box.
 - e. Enter the values and operators for each qualifier.
5. (Optional) Select the **Resource Qualifiers** tab.
 - a. Use the LOV in the Name field to choose the type of resources for the territory.
 - b. Use the LOV in the Operator field and Value field to make the appropriate selections.

Note: Use Mass Create Templates **only** when creating territories with a territory template. Specify the template name in the Overview tab before clicking this button.

6. Select the **Resources** tab.
 - a. Select the resources for the territory using the LOV in the Name field.
 - b. Enter the Group level from the LOV in the Group field.
 - c. Enter Role from the LOV in the Role field.
 - d. Select Access Type from the LOV in the Access Type field.

7. (Optional) Select the **Subterritories** tab.

Use this tab if your territory hierarchy includes territories below the current territory.

- a. Click **New Subterritory** and repeat the territory creation procedure for the new sub-territory.
- b. Click **Save** from the menu.

See Also

- [Understanding the Territory Details Tabs](#)
- [Using a Template to Create Large Numbers of Territories](#)

Using the Territory Details Window

Use the Territory Details window to perform the following.

- [Create Territories](#)
- [Create Escalation Territories](#)
- [Create Territory Templates](#)

See Also

[Understanding The Territory Details Tabs](#)

Creating Territory Types

Perform the following steps to create territory types.

Prerequisites

- There must be a [Territory Plan](#) in place.
- You must [enable your qualifiers](#).

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Administration**.
The territory tree Navigator window opens.
2. From the Administration menu, select **Create Territory Type**.

The Territory Type window opens.

3. If a similar territory type already exists, then you can save time by copying it.
 - a. **Search for a similar territory type.**
 - b. If a similar territory type is found, then click **Copy Type**.

The application creates a copy of the existing territory type that can be modified.
4. In the Usage field, use the list of values (LOVs) to select the type of application using this territory type.
5. Enter a name for the territory type and a description.
6. Enter a date range to limit the use of the territory type by date.
7. Use the LOV to select one or more transaction qualifiers based on the territory usage field.
8. Click **OK** to save your work and exit.

Selecting the Resources for a Territory

Perform the following steps to select the resources to staff a territory.

Note: It is not mandatory to enter resource qualifier information if you know exactly which resources you want to use in a territory.

Prerequisites

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

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Administration**.

The territory tree Navigator window opens.
2. Navigate to the chosen territory and double-click the territory.

The Territory Details window opens.
3. Select the **Resource Qualifiers** tab.

- a. In the Name fields of the Resource Qualifier region, use the LOV to enter the qualifiers related to the skill set of the employees assigned to this territory.
 - b. Enter the values for each qualifier.
4. Select the **Resources** tab.
 - a. Use the list of values (LOVs) to enter the resources in the Name fields if you want to assign them to this territory or you have a small pool of people to work with.
 - b. If you do not know the people you want assigned to this territory and have a large pool of potential names, then click **Auto Assign Resources**.

The Qualifying Resources window displays a list of people that fit the resource qualifiers values you have entered.

If no people or the wrong people are found, then go back to the Resource Qualifiers tab and enter a different set of resource qualifier values, or select resources manually in the Resources tab.
 - c. Select the people you want to assign to this territory by checking the **Assign** check box next to their name.
 - d. Click **OK** when you are finished.
 - e. Check the **Primary Contact** check box next to the name of the person designated to become the primary contact for the territory.
 - f. For each resource you can add a Start and End Date to limit their participation.
 - g. For each resource, enter the transactions you want them to access.

For example, you want some resources to access account and contact information, but not lead information.
 - h. To enter access for an individual select the resource in the Resources region.
 - i. Select the access type in the Access region below.
5. Click **Save** on the toolbar.

Creating Escalation Territories

Use this procedure to create escalation territories. Escalation Territories are alternate territories in which transactions such as a service call are automatically reassigned

when certain conditions are not met. Escalation Territories define the resources that handle the escalations.

Prerequisites

- There must be a [Territory Plan](#) in place.

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Administration**.

The territory tree Navigator window opens.

2. From the Administration menu, select **Escalation Territories**.

The Escalation Territory Details window appears.

3. In the **Overview** tab, use the list of values (LOVs) in the Usage field to select the type of application you want to use in this territory. Your selection limits the types of qualifiers used in the territory definition.

4. Enter a name and description for the territory.

5. Enter the Start and End Dates to limit the time the territory is effective.

By default the territory become effective on the date created.

6. Select the resource qualifier for the escalation territory

See the procedure in [Selecting the Resources for a Territory](#).

7. Click **Save** on the toolbar.

Entering Qualifier Values

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

Prerequisites

The Transaction Qualifiers or Resource Qualifiers tab is selected.

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Administration**.

The territory tree Navigator window opens.

2. Navigate to the chosen territory and double-click the territory.
The Territory Details window opens.
3. Select either the Transaction Qualifiers or Resource Qualifiers tab.
4. Select the qualifier in the Qualifiers region.
You will see the possible value types. For example, if you are entering values for the Customer Name qualifier used in Sales applications, then enter a value.
5. Select an operator using the list of values (LOVs).
The list of operators varies depending on the type of qualifier selected. For example, some qualifiers allow only the "=" symbol.
6. Enter the values in the appropriate fields.
Some operators limit the range of values. The field names change depending on the qualifier.

Using a Template to Create a Large Number of Territories

Use this procedure to create a territory template that automates the process of creating a large number of territories. After you create the territories, then open up each individual territory and select the resources you want assigned to each territory.

The following procedure consists of two sections:

- [Creating a template](#)
- [Creating a large number of territories from that template](#)

Creating a Template

Prerequisites

- If you want to use territory types to create territories, then [create the territory types](#) first.
- There must be a [Territory Plan](#) in place.

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Administration**.

The territory tree Navigator window opens.

2. In the Navigator, select the territory that serves as a parent to the new territory. If this is the first territory you are creating, then select **Catch All**.
3. Right-click and select **New** from the drop-down menu.

The Template Territory Details window appears.

If you selected an existing territory as the parent, then the Usage and Parent fields are pre-filled. If Catch All is the parent territory, then use the list of values (LOVs) in the Usage field to select the type of application you want to use for this territory. Your selection limits the types of transaction qualifiers you can use in the territory definition.

4. In Transaction Types fields, use the LOV to enter one or more transactions.

You can create territories for a variety of transactions. These include account, lead, opportunity, and service request. CRM applications restrict the types of transactions that can be used for territory creation. For example, you cannot create a territory for leads for a service application.

5. If you want to use an existing territory type to create this territory template, then use the LOV to enter it in the Type field.

If you use a territory type, then you are restricted to using the qualifiers set up in the territory type.

6. Select the **Transaction Qualifiers** tab.

- a. Use the LOV to enter the qualifiers in Qualifier Type.

If you are using a territory type to create the territory template, then some of the Qualifier names are already prefilled.

- b. Select either **Static** or **Dynamic** from the Qualifier Mode drop-down list for each qualifier.
- c. Enter values for each transaction qualifier:
- d. Select the qualifier in the Transaction Qualifiers region.
- e. If the qualifier you have selected is a static qualifier, then enter the values.
- f. If the qualifier is a dynamic qualifier, then enter the values or value sets, clicking **Next Value Set** between each entry or set of entries.
- g. If you do not want to add resource qualifiers for this template, then go directly to the Creating Mass Territories step.

7. (Optional) Select the **Resource Qualifiers** tab.
 - a. Use the list of values (LOVs) to enter the qualifiers in the Name fields.
 - b. Select either **Static** or **Dynamic** from the Mode drop-down list for each qualifier.
 - c. Enter values for each resource qualifier:
 - * Select the qualifier.
 - * If the qualifier selected is a static qualifier, then enter the value(s).
 - * If the qualifier is a dynamic qualifier, then enter the value(s) or value set(s), clicking **Next Value Set** between each entry or set of entries.
8. Save your work.

Creating Mass Territories With a Template

Prerequisites

- You must have created a template.
- There must be a [Territory Plan](#) in place.

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Administration**.

The territory tree Navigator window opens.

2. Navigate to the chosen territory and double-click the territory.

The Territory Details window opens.

3. Open the Transaction Qualifier tab or the Resource Qualifier tab.

The chosen tab window opens.

4. Click **Mass Create Territories**.

The system creates territories with generated names in the form:

<template name> - GENERATED TERRITORY #<number>

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

US Time Zones - GENERATED TERRITORY #1

US Time Zones - GENERATED TERRITORY #2

US Time Zones - GENERATED TERRITORY #3

See Also

[Creating Geographical Territories Using a Template \(Example\)](#)

Entering Static Qualifier Values for Templates

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

Prerequisites

Use this procedure as you [create territory templates](#).

Steps

1. Open the Transaction Qualifier tab or the Resource Qualifier tab.

The chosen tab window opens.

2. Select the name of the qualifier at the top of the window.

The possible value type(s) appear below.

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

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

Resource Qualifiers can consist of static qualifiers.

3. Use the Operator list of values (LOVs) to select an operator.

The list of operators varies depending on the type of qualifier used. Some qualifiers, such as Name of Customer, allow only the "=" or "<>" operators.

4. Enter the values in the fields provided. Some operators allow a range of values to be entered; others only a single value.

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

See Also

[Creating territory templates](#)

Entering Dynamic Qualifier Values for Templates

Perform the following steps while creating territory templates to enter values for dynamic qualifiers. Dynamic qualifiers have a different value in each territory created.

Both transaction qualifiers and resource qualifiers are shown in the following steps.

Prerequisites

Use this procedure as you [create territory templates](#).

Steps

1. Choose the **Transaction Qualifier** tab or the **Resource Qualifier** tab.

The selected tab window opens.

2. Choose the name of the qualifier at the top of the window.

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

If you are entering values for the Language Type resource qualifier used in sales applications, then you can enter two values: English and French.

3. Use the Operator list of values (LOVs) to select an operator.

The list of operators varies depending on the type of qualifier used. Some qualifiers, such as Name of Customer, allow only the "=" or "<>" operators.

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

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

5. Click **Next Value Set**.

A new entry line opens.

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

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

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

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

- a. Enter the first state in the Value field and click **Next**.
You can manually enter "1" in the Value Set field.
 - b. Enter the second state in the Value field and click **Next**.
You can manually enter "2" in the Value Set field.
 - c. Repeat the procedure for each of the remaining states.
8. When you have entered all of the values, complete the procedure for [creating territory templates](#).

Creating Geographical Territories Using a Template (Example)

The following procedure is an example of using a template to create geographical territories using the following business scenario. The steps include:

- [Setting Up the Template](#)
- [Setting Up Overview Information](#)
- [Setting Up Transaction Qualifiers](#)
- [Setting Up Resource Qualifiers](#)

The Business Scenario

Suppose you want to create territories for telephone support and field service engineers for different city branches of two large customers: Vision Enterprises and Business World Inc.

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

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

- Vision Enterprises: San Francisco with Manager Resource
- Vision Enterprises: San Francisco Technician Support
- Business World Inc.: San Francisco with Manager Resource
- Business World Inc.: San Francisco Technician Support

Below are the steps required to create territories for this business scenario.

Setting Up the Template

1. Navigate to **Administration >Territory Management >Mass Create Territories**.
2. In the **Overview** tab, [set up the basic information about the territory template](#).
3. In the **Transaction Qualifiers** tab, [set up one dynamic transaction qualifier, Customer Name, and one static transaction qualifier City](#).
4. In the **Resource Qualifier** tab, [enter the qualifiers that are used to pick the resources who handle the transactions you set up in the Transaction Qualifier tab](#).

- * If you are setting up geographic territories and you want the resources to come from the same geographical area as the transactions, then you must set up a geographical structure for the resource qualifiers that is parallel to the one you set up for the transaction qualifiers.
- * The one resource qualifier used in this example is: Job Title with values of manager and technician.

- a. Click **Mass Create Territories**.

The system creates territories with generated names in the form.

- * Vision Enterprises/Business World by city: GENERATED TERRITORY #1
- * Vision Enterprises/Business World by city: GENERATED TERRITORY #2
- * Vision Enterprises/Business World by city: GENERATED TERRITORY #3
- * Vision Enterprises/Business World by city: GENERATED TERRITORY #4

- b. Open each generated territory and change the generated name to a recognized one.

5. In the **Resources** tab, click **Auto Assign Resources**.

The Qualifying Resources window displays a list of people that fit the resource qualifiers values you have entered.

6. Select the people you want to assign to this territory by checking the **Assign** check box next to their name and click **OK**.
7. Check the **Primary Contact** check box next to the name of the primary contact for the territory.

8. For each resource add a Start and End Date to limit their participation.
9. Click **Save** from the menu.

Setting Up Overview Information

Perform the following steps to set up the template overview information:

1. In the Usage field, select from the list of values (LOVs) the type of application using this territory template.

Your selection limits the types of qualifiers you can use in the territory template definition.

2. Enter a name and description for the territory template.
For example, Vision Enterprises/Business World by city.
3. To limit the time the territory template is effective, enter the dates.
By default the territory template becomes effective on the date created.
4. Choose from the LOVs in the **Parent** field.
5. Use the LOV to select one or more types of transactions that will be assigned to each territory.

Available values depend on your territory usage.

Setting Up Transaction Qualifiers

Perform the following steps to set up transaction qualifiers.

1. Select the **Transaction Qualifiers** tab.
2. Use the list of values (LOVs) to enter the City and Customer Name qualifiers in the Qualifier Type fields.
3. From the Qualifier Mode drop-down list, select **Static** for City transaction qualifier.
4. Select "=" as the operator.
5. Enter the first city, San Francisco, as a value for the City qualifier.
6. Enter the Customer Name qualifier in the qualifier region.
7. Select **Dynamic** in the Mode field.
8. Select "=" as the operator.

9. Enter the first of the two companies, Business World, as a value for the Customer Name qualifier.
10. Click **Next Value Set**.
The "1" shows up in the Value Set field or you can manually enter "1" in the Value Set field.
11. Enter Vision Enterprises as a value for Customer Name.
12. Repeat step 10 but change the number to "2".

Setting Up Resource Qualifiers

Perform the following steps to set up resource qualifiers:

1. Select the **Resource Qualifiers** tab and add the Job Title qualifier.
2. From the Qualifier Mode drop-down list, select **Dynamic** for the Job Title qualifier.
3. Select "=" as the operator.
4. Select the list of values (LOVs) to choose the first of the two: Job Title and Manager.
5. Repeat step 10 of the Setting up Transaction Qualifiers.
6. Enter the second job title, Technician, following the same procedure.
7. Repeat step 12 of the Setting up Transaction Qualifiers but enter a value of "2."

Creating Customer Name Range Groups

The Customer Name Range Group allows you to create a new group, or modify or delete an existing group name. Deletion can only occur when it has not been associated with Customer Name Range transaction qualifier value.

Note: The Customer Name Range Group applies **only** to Sales and Telesales. It has a customer name range transaction qualifier associated with it which is of account type.

Perform the following steps to create a new group.

Prerequisites

None

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Administration**.

The Navigator window opens.

2. Select **Define Customer Name Range Group** from the Administration drop down menu.

The Define Customer Name Range Group window opens.

3. Enter your name and description in the appropriate fields
4. Save and close the screen.
5. Either create a new Sales and Telesales Territory or open an existing one.

The Territory Details window opens.

Note: An Account Transaction Type must exist.

6. Select the Transaction Qualifier Tab.
 - In the Name field, select the LOV list. The Select Transaction Qualifiers window opens. Select Customer Name Range and click **OK**.
 - In the Operator field, the default is "=".
 - In the Group field, select your Customer Name Range group from the LOV.
 - In the Value From field, enter all applicable customer names.
7. Save your work.

Creating Mass Change Territory Resources

The Mass Change Territory Resources allows you to transfer territories which have been assigned to a particular resource to another resource.

An example of using this would be if salesperson A was leaving the company and wanted to transfer his territories to the incoming salesperson B.

Perform the following steps to make mass changes in Territory Resources.

Prerequisites

None

Steps

1. From CRM Administrator responsibility, select **Territory Manager > Territory Administration**.

The Navigator window opens.

2. Select **Mass Change Territory Resources** from the Administration drop down menu.

The Mass Change Territory Resource window opens.

3. In the Resource field in the Find Territories region, select from the LOV.

If the resource field is left blank and you click Find, then a list of all the territories that do not have any resources attached appears.

4. Click **Find** to find all territories assigned to that resource.
5. In the Operation region select either the Replace or Add button.
6. In the Scope region, select either the All or Selected button.

Note: If you choose to select certain resources, hold down the control key on your keyboard as you use your mouse to select.

7. In the Resource field in the Assignee region, select the new resource from the LOV. Click **OK**.
8. Select **Update Territories** to save.

Note: Resources that have territories "replaced" will not be associated with these territories again.

Tips for Fine-tuning Territory Assignment Performance

Ranking Strategy

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

For example, if you have two sales organizations, one in Canada and one in the United States, and you know that some 80 percent of your customers are coming from the United States, then rank the US territory higher than the Canada territory. The application saves processing time as a result because it looks for a US territory before it looks for a Canadian territory.

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

Suppose you have two overlapping territories.

- Territory A

Qualifier: Company Name Range = F%

Note: The % symbol is a wild card.

- Territory B

Qualifier: Company Name Range =Vision Enterprises%

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

Comparison Operators

Avoid using "<>", NOT LIKE and NOT BETWEEN operators.

Troubleshooting

The following tips can be useful.

- Set up territories in hierarchical fashion for easy maintenance.
- Make the territories as generic as possible.
- If you create a territory and do not assign resources to it, then the Territory Manager does not return this territory as a qualifying territory.
- You can create your own module specific "Catch All."

Running Concurrent Programs

After defining territories using Territory Manager, run the Generate Territory Package concurrent program. This builds the Territory Assignment Engine.

After the concurrent program runs successfully, the Territory Manager module automatically assigns the most qualified individual to a transaction.

Run this program every time a territory is added or changed.

Pre-Seeded Concurrent Programs

Name	Function
Generate Territory Packages	<ul style="list-style-type: none">■ Builds the API that returns the winning territories which are defined in territory setup.■ Returns the winning territories and resources.■ Creates search index for faster performance.

Understanding Resource Manager

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

- [Resource Manager Overview](#)
- [What are Resources?](#)
- [Roles versus Role Types](#)
- [Understanding Groups](#)
- [Determining Group Hierarchy](#)
- [Understanding Teams](#)
- [What is a Salesperson?](#)
- [Terms and Definitions](#)

Resource Manager Overview

The Resource Manager provides lists of resources—as individuals, groups, and teams—for applications to access and manage their resources. Resources are defined as the employees, supplier contacts, parties and partners that are used by the different CRM components to accomplish business objectives. You can use Resource Manager to import and view resources, define resources, define roles and role types, create teams and groups, and organize resources within those teams and groups. Defining and organizing your resource information makes your resources available to the connected application modules for work action. Resources can be organized into groups and teams. Each group or team can be defined in one of two ways, a role or a role type.

What are Resources?

The following table describes all five resource categories used in the Resource Manager.

Resource Category Descriptions

Resource	Description
Employee	An employee is a person who has been hired to work for a company. Employee resources can be imported as resources from the Human Resources Management System (HRMS).
Supplier Contact	A supplier contact is the contact information for a person or agency that sells raw material or goods. Supplier resources can be imported as resources from the Purchasing (PO) application.
Party	A party is an entity that can enter into a business relationship. A Party resource can be imported as resources from Accounts Receivables.
Partner	A partner is one of two or more persons who contribute capital to establish or maintain a commercial venture and who usually share in the risks and profits. A Partner resource can be imported as resources from Accounts Receivables.
Other/TBH	This is the only resource that is created and not imported. Use this resource to create a salesperson that is going to be hired (TBH) but is not yet an employee.

Roles versus Role Types

A role may encompass one or more job description and title. You assign seeded roles to resources, resource groups and resource teams. For example, the seeded roles for Sales include Manager, Administrator, Approver, and Representative. The seeded roles for Telesales include Manager, Administrator, and Agent. You can define custom roles for your business needs.

A role type is a collection of roles associated with a particular CRM module. For example, Sales, Telesales, Marketing, Sales Compensation, Support, Call Center are all role types. Role types are seeded by the different modules that access the Resource Manager. You can define custom role types for your business needs.

Understanding Groups

Resource Groups

A group is based on the similar functionality or the roles of its members. It can consist of individual resources and groups. For example, Linda's group includes individual resources, John, Mark, and Carol, as well as another resource group, Mary's group.

A resource can belong to multiple groups. For example, Mary reports to Linda as a west regional sales manager. She has three sales representatives directly working for her. Since Mary is an invaluable resource, she can be assigned to a new product development group to provide market feedback.

Group Member Roles

Roles and responsibilities can be associated with all members of a resource group. For example, a sales group has one sales manager and a few sales representatives. The sales manager and the sales representative are job roles assigned to the group members.

Each member can have multiple roles defined within a group. For example, Mid West Sales Group consists of only two people due to resource constraints, one of them plays two roles, sales manager and field sales agent, at the same time.

Group Roles

Multiple roles can be assigned to a resource group. For example, Group A has three resources (An employee, a Party, and a Partner). Those three resources play a role in Group A, even if they have different roles assigned to them individually. The Party can have an individual Team role but the role it plays in group A is Manager role.

Determining Group Hierarchy

Individual resources can be assigned to a group, and a group can belong to another group or to multiple groups. Resources therefore can be organized through a group hierarchy with a parent-child relationship.

For example, Jack William and Frank Nelson are sales representatives who belong to the Product A group and directly report to Pat Smith, the Sales Manager of Product A. However, Jack and Frank indirectly report to Jeff Walsh who leads the Field Sales Group as Field Sales Manager. The Field Sales Group and the Product A group have a parent-child relationship. You can use the group hierarchy to view

direct reporting or all reporting information for a resource. Refer to the [Viewing Group Hierarchy](#) section of this manual for more detailed information.

Understanding Teams

Resource Teams

A team is a collection of cross-functional resources. Team members are chosen for their availability and qualifications. You define a team to organize the necessary resources to accomplish an objective or a particular task. It consists of groups and individual resources that work together to efficiently complete a project. A resource can belong to multiple resource teams. For example, a solution team can have support and sales groups as well as a telesales agent, an individual resource.

Team Member Roles

Each team member, whether it is an individual resource or a resource group can have multiple roles assigned to a team. For example, a team member can have both Sales Manager and Sales Representative roles due to resource constraints in a team.

Team Roles

You can assign multiple roles to a team. For example, a solution team plays a support manager role, and a sales approver role at the same time while sales demand is strong.

What is a Salesperson?

A salesperson is any person involved in the sale or support of products and services. Salespeople are typically field personnel, but can also be support teams and other product specialists involved either directly or indirectly in generating revenue for the organization.

Depending on their relationship to the sales organization, salespeople may be internal employees or external people or organizations. Employees, Parties, Partners, and Supplier Contacts can all become salespeople by having sales numbers and relevant information assigned to them after being imported to the Resource Manager. However, these imported resources will always carry their original resource categories of Employee, Party, Partner, or Supplier Contact. These resource categories will never change.

For example, your company partners with Vision Enterprises to promote certain products. Vision Enterprises can be imported as category “Partner” from Accounts

Receivables and be given a sales number and relevant information, thus Vision Enterprises becomes a salesperson and can be assigned to your group or team, still with the same category “Partner”, for marketing campaign or opportunities.

In addition to imported resources, the only resources you can create, and not import, is a salesperson with resource category of OTHER, or TBH.

Terms and Definitions

The following table describes terms and definitions associated with the Resource Manager.

Resource Manager Terms and Definitions

Term	Description
Resource Manager	A single place for defining, accessing, and maintaining all CRM and ERP Resources.
Workflow	Oracle Workflow lets you automate and continuously improve business processes, routing information of any type according to business rules you can change. Oracle Workflow manages business processes according to rules that you define. The rules, which we call a workflow process definition, include the activities that occur in the process and the relationship between those activities. An activity in a process definition can be an automated function defined by a PL/SQL stored procedure or an external function, a notification to a user or role that may optionally request a response, a business event, or a sub flow that itself is made up of a more granular set of activities.
Employee	An employee is a person who has been hired to work for a company. Employee resources can be imported as resources from the Human Resources Management System (HRMS).
Supplier Contact	A supplier contact is the contact information for a person or agency that sells raw material or goods. Supplier resources can be imported as resources from the Purchasing (PO) application.
Party	A party is an entity that can enter into a business relationship. A Party resource can be imported as resources from Accounts Receivables.
Partner	A partner is one of two or more persons who contribute capital to establish or maintain a commercial venture and who usually share in the risks and profits. A Partner resource can be imported as resources from Accounts Receivables.

Resource Manager Terms and Definitions

Term	Description
Other/TBH	This is the only resource that is created and not imported. Use this resource to create a salesperson that is going to be hired (TBH) but is not yet an employee.

Using Resource Manager

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

- [Getting Started](#)
- [Importing Resources](#)
- [Finding a Resource](#)
- [Viewing a Resource From the List](#)
- [Defining a Salesperson](#)
- [Defining Resource Groups](#)
- [Defining Resource Teams](#)
- [Viewing Group Hierarchy](#)
- [Running an Audit Report](#)
- [Viewing an Audit Report](#)
- [Running a Group Structure Report](#)
- [Viewing a Group Structure Report](#)

Getting Started

Typically, procedures are performed in the following order:

1. Select Import Resources from the navigator to import employees, parties, partners, and supplier contacts.

2. Select Resources from the navigator to assign role, group, and team information to resources and to define a salesperson (Other/TBH).
3. Select Groups from the navigator to define a group, assign resources to the group, and specify parent-child group relationships.
4. Select Teams from the navigator to define a team and assign resources to the team.
5. Select Dynamic Groups from the navigator to define a group based on criteria specified in SQL statements.
6. Select Group Hierarchy from the navigator to view resources reporting information.

Importing Resources

The Resource Manager allows the user to import a resource into Resource Manager from different application databases depending on the resource category you select. After selecting a resource based on its category, identify its role and eligibility dates before saving it to Resource Manager.

Employees, Parties, Partners, and Supplier Contacts can be imported into the Resource Manager from HRMS, Purchasing and Accounts Receivables, depending on the resource category you select. The only resources you can create, but not import through the Resource window, is the salesperson with the resource category of OTHER, or TBH (to be hired). Perform the following steps to import a resource.

Prerequisites

None

Steps

1. In the CRM Administrator responsibility, navigate to **Resource Manager > Maintain Resources > Import Resources**.

The Selection Criterion window opens.

2. Select from the list of values (LOV) in the Resource Category field.
3. (Optional) Refine your resource search by selecting from the LOV in the available fields.

Different resource categories have different search field options.

4. Click **Search**.

The application populates the Category and Name fields in the Search Results region.

5. Choose a resource by deselecting the **Select** check boxes for the undesired resources and click **Create Resource**.

The Default Values window opens, and the application populates the Start Date field with the current date.

6. (Optional) Select an end date, managing employee, role, and role effective dates.
7. Click **OK**.

The Selected Resources window opens displaying the resource selections.

8. Deselect the undesired resource check boxes and click **Save Resource** if you want to save a resource to Resource Manager.

Resource importation and definition is complete.

9. If you want to further define the resource roles, groups, teams, or other details use this procedure.
 - a. Click **Details**.

The Resource window opens.
 - b. Define the resource information from the tab options.
 - c. Choose **File > Save**.

Guidelines

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

Finding a Resource

Use the Find Resources window to perform the following actions:

- Defining a search criteria to find one or more resource summaries
- [Defining a salesperson](#)

Prerequisites

Create or Import a Resource

Steps

You can search for a resource on any single or combination of fields. Perform the following steps to find one or more resource summaries.

1. In the CRM Administrator responsibility, navigate to **Resource Manager > Maintain Resources > Resources**.

The Find Resources window opens.

2. Choose one or more parameters upon which to search.

Typical search parameters are:

- Number
- Category
- Transaction Number
- Name

3. Enter the required dates for the resource in the Start Date and End Date fields.

4. Click **Find**.

The Resource Search Results window opens.

Viewing a Resource From the List

Use the Resource Search Results window to select a resource for detailed viewing.

Prerequisites

Perform a resource search before you can view the summary results.

Steps

1. Select the desired resource from the Resources list.

2. Click **Resource Details**.

The Resource window opens. From this window, you can view or update existing resource information.

Defining a Salesperson

You designate a resource as a salesperson in the Receivables tab. A resource designated as a salesperson in this manner is organization specific, although in general, resources are not.

Note: You can only create a resource of category Other, or TBH (to be hired), through the Resource window. If your resource is of another category, it must be imported.

If a salesperson is defined with category TBH, then this salesperson is not visible within Accounts Receivable. A Salesperson defined in this manner can be viewed *only* within CRM.

The following table describes the types of tasks that you can perform in the Resource window.

Tasks Available through the Resource Window

Task	Performing the Task
Create (define) a new salesperson of type Other or TBH	Use the steps following
Update a resource definition	Modify the resource definition as desired.
View resource details	View the resource details as desired.

Prerequisites

None

Steps

Perform the following steps to create a salesperson.

1. Click **New** in the Find Resource window.
The Resource window opens.
2. Select either TBH or Other for the Category.
3. Enter a valid value for the Salesperson Number.
4. Enter the new salespersons name in the Name field.
5. Enter a Start Date for the new salesperson.

You must enter at least a start date here. The end date defaults to an open end data and is optional.

6. Select the Receivables tab.

For an explanation of each tab, see the [Guideline](#) following.

7. Enter the range of dates that this salesperson is to be active.

The Date Active (start date) is a required field and defaults as the current date. However, you can change it by accessing the calendar through the list of values (LOV). If you do not enter a Date Active (end date), this salesperson is active indefinitely. The Date Active cannot precede the Start Date.

If the salesperson's status is Active but the transaction date that you enter is not within this date range, Receivables does not display this salesperson in the LOV in the Transactions window.

8. (Optional) Enter the new salespersons E-mail address.
9. (Optional) Enter a Geo Override value for this salesperson. This value associates the salesperson with a unique tax jurisdiction.

The Geo Override and Inside City Limits fields are available only if you have installed a sales tax vendor of type Taxware Sales/Use Tax System® or Vertex Quantum®.

If you entered a value in the Geo Override field and the tax jurisdiction for this address is within city limits, select the **Inside City Limits** check box. This check box is enabled only if your sales tax vendor is Vertex Quantum.

For additional information, see the following:

- *Integrating Oracle Receivables with Taxware Sales/Use Tax System, Release 11i.*
- *Integrating Oracle Receivables with Vertex Quantum, Release 11i.*

10. Check the **Active for Receivables** check box to indicate that this resource is a salesperson.
11. Enter a quota Sales Credit Type.

Oracle Order Management uses this information to determine if the sales credit for an order is a quota or non-quota amount. You can define additional sales credit types in Oracle Order Management. However, you can only assign Sales Credit Types that are of type 'Quota' to salespersons in Receivables.

12. (Optional) Enter the Accounting Flexfield for your Revenue, Freight, and Receivable Accounts.

Receivables can use this information, along with your AutoAccounting rules, to determine the revenue, freight, and receivable accounts for invoices you assign to this salesperson.

13. (Optional) Assign a territory to this salesperson.

The Territory Flexfield must be set up before an assignment is made.

14. (Optional) If you assigned a territory to this salesperson, then enter the range of dates that this territory is to be assigned to this salesperson.

The Start Date defaults as the current date, but you can change it. If you do not enter an End Date, this salesperson will be active indefinitely, or as long as the territory is active.

15. (Optional) Enter more information in the other tabs to further specify the resource.

16. Choose **File > Save** to save your work.

This action populates the Resource Number field with the automatically generated resource tracking number.

Guidelines

The following table describes tabs which appear in the Resource window.

Resource Tab Descriptions

Tab	Description
Roles	Use this tab to view, assign, and modify information about roles and role types. The role type is the actual role a resource plays, for example, Administrator or Contractor. These roles, role types, and role attributes check boxes are defined in the Setup screen. The Start Date default is the current date, and it can be modified.
Groups	Use this tab to view, assign, and modify information about groups. Groups are not necessarily one person, and a resource can belong to more than one group. The Groups tab reveals in detail which groups the resource belongs to, and the role in the group. Resources can play multiple roles in a group. Click the group name to display the group member roles if this resource has group member roles assigned. See Defining Resource Groups for details.

Resource Tab Descriptions

Tab	Description
Teams	Use this tab to view, assign, and modify information about teams. Teams can comprise multiple groups and combinations of groups and individuals. Click the team name to view the Team Member Roles. See Defining Resource Teams for details.
Service	Use this tab to define the Cost per Hour and Time Zone information. The Support Site field is not operational, and not used at this time. You define the currency type in the Compensation tab.
Interaction Center	Use this tab to view, assign, and modify the e-mail addresses and the Agent ID numbers of resources associated with the eMail Center or Call Center modules. This tab is used primarily by the Call Center and eMail Center modules. All fields are read-only. If the resource is not associated with either center, these fields are blank. (Optional) Enter the Scripting Agent Login if the employee uses Oracle Scripting. Use the Telephony Parameters region to enter middle ware configuration, parameters, and values for the agent. Which telephony parameters are required and which values to specify depend on the types of switch and CTI middle ware used in the Call Center.
Compensation	Use this tab to view or define the Currency Type corresponding to the Cost per Hour listed on the Service tab.
Receivables	Use this tab to define a salesperson.
Miscellaneous	Use this tab to view personal information about the resource. The fields in this tab are read-only.

The following table describes fields which appear in the Receivables tab, in the Resource window, which are used to define a salesperson.

Field Descriptions for the Receivables tab in the Resource Window

Field	Description
Date Active	In this field you should enter the range of dates that this salesperson is to be active. Date Active (start date) is a required field, the Date Active (end date) is optional. If you do not enter an end date, this salesperson is active indefinitely.
Geo Override and Inside City Limits	The Geo Override value associates the salesperson with a unique tax jurisdiction. Both fields are available only if you have installed a sales tax vendor of type Taxware Sales. Oracle recommends you use Tax System or Vertex Quantu.

Field Descriptions for the Receivables tab in the Resource Window

Field	Description
Accounting Flexfield	The accounting flexfield includes Revenue, Freight, and Receivable Accounts. Receivables can use this information, along with your AutoAccounting rules, to determine the revenue, freight, and receivable accounts for invoices that you assign to this salesperson.
Territory Flexfield	If you want to assign a territory to this salesperson, then in this field you should enter the range of dates that this territory is to be assigned to this salesperson. The Start Date defaults as the current date, but you can change it. If you do not enter an End Date, this territory is active for this salesperson infinitely.

Defining Resource Groups

Sometimes a resource is not just one person. Dividing these single resources into groups can strengthen their skills and save time when allocating resources to a job. A group of people and a resource can belong to more than one group. Choose to search for an existing group or create a new group; then define the group's members, roles, usages, and relations. Perform the following steps to define a resource group.

Prerequisites

None

Steps

1. In the CRM Administrator responsibility, navigate to **Resource Manager > Maintain Resources > Groups**.

The Define Groups window opens.

2. (Optional) To find an existing resource group, then use this procedure.

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

The Find Group window opens.

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

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

- c. Select a group name in the Results table and click **OK**.
The application populates the Define Groups window with the group information.
3. If you want to create a new group, then use this procedure.
 - a. Enter a group name in the Name field.
 - b. Enter a brief description of the group in the Description field.
 - c. Enter the effective dates for the team in the Start and End fields.
4. (Optional) Select the **Exclusive Flag** check box to assign resources to this group with a particular member role and usage that is not assigned to any other exclusive group with the same member role and usage, in the same time frame.
5. In the Members tab, select a resource category and member number from the LOV in the Category and Number fields.
The application populates the Name field with the member's name and affiliated organization.
6. (Optional) Select a member name and click one of the available buttons.
For a detailed description of the group member button options, see the Resource Group Member Buttons table in the [Guidelines](#) section.
7. In the Roles tab, select a role type and role name from the LOV in the Role Type and Role fields.
The roles relationship to its category is indicated by the role attributes check box selections.
8. In the Usages tab, select one or more usage descriptions from the LOV in the Usage field.
9. Choose **File > Save**.
10. Select either the Parent Group or Child Group tab depending on the relation type.
11. Select a group number from the LOV in the Group Number field of the selected tab.
The application populates the Group Name field of the Parent Group or Child Group tab.
12. Select effective dates for the relation from the LOV in the Start and End Date fields.

13. Choose **File > Save** to save the group definition.

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

Note: If the reporting hierarchy needs to be changed, it is better to delete a group member role rather than end dating it.

Guidelines

The following table describes buttons which appear on the Resource Group Member window.

Resource Group Member Buttons

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

The following table describes tabs which appear on the Define Group window.

Define Group Tab Descriptions

Tab	Description
Members	Use this tab to define the member category and member number of the group. You can also view a members details, assign the member to another group, and view a members role type in this tab.
Roles	Use this tab to define roles and role types for the group.
Usages	Use this tab to determine what CRM modules will use the group.
Parent Group	Use this tab to define a group as a parent group.
Child Group	Use this tab to define a group as a child group.

See Also

[Defining Resource Teams](#)

Defining Resource Teams

Resource groups provide candidates for teams or an individual resource. Team members represent a resource group, and are chosen for their availability and qualifications. Teams consist of people that work together to efficiently complete a project. Perform the following steps to define a team.

Prerequisites

Define a resource group

Steps

1. In the CRM Administrator responsibility, navigate to **Resource Manager > Maintain Resources > Teams**.

The Define Teams window opens.

2. (Optional) To find an existing resource team, then use this procedure.

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

The Find Team window opens.

- b. Select a team name from the list of values (LOV) in the Name field and click **Find**.

The application populates the Results region with the team name search results.

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

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

3. Enter a team name in the Name field.
4. (Optional) Select the **Exclusive Flag** check box to assign resources to this team with a particular member role and team usage that is not assigned to any other exclusive team with the same role and usage, in the same time frame.
5. Enter a brief description of the team in the Description field.
6. Enter the effective dates for the team in the Start and End fields.
7. In the Members tab, select a category and member from the LOV in Category, and Number fields. For a detailed description of the group member button options, see the Resource Group Member Buttons table in the [Guidelines](#) section.

The application populates the Name field with the member's name.

8. (Optional) Click **Member Roles** to assign team member roles to a team.
9. (Optional) Select a member name and click **Member Details** to view specific member information.
10. In the Roles tab, select from the LOV in the Role Type and Role fields.
The roles relationship to its category is indicated by the role attributes check box selections.
11. In the Usages tab, select from the LOV in the Name field.
12. Choose **File > Save** to save the team definition.

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

Guidelines

The following table describes tabs which appear in the Define Team window.

Define Team Tab Descriptions

Tab	Description
Members	Use this tab to define members of a team.
Roles	Use this tab to define the team roles and role types.
Usages	Use this tab to determine what CRM modules will use the team.

See Also

[Defining Resource Groups](#)

Viewing Group Hierarchy

Use group hierarchy to view both the subordinates and a direct manager for a specific resource. For example, you can view only those resources that report directly, or you can view all resources that report to a particular person. This feature does not identify who the manager is and who the subordinates are for this resource. You can restrict your view by resource category. Perform the following steps to view the hierarchy of a group.

Prerequisites

None

Steps

1. In the CRM Administrator responsibility, navigate to **Resource Manager > Maintain Resources > Group Hierarchy**.

The Group Hierarchy window opens.

2. Select a resource from the list of values (LOV) in the Name field and click **View** to view the groups of a particular resource member.

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

3. Select a resource category from the Category LOV and click **View** to view the groups and members of a resource category.

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

4. Select **All** from the Category LOV and click **View** if you want to view all the resource groups and members in the database.

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

Guidelines

Selecting **Reports Directly** from the LOV in the View By field searches the database for members that report directly to a specific resource.

See Also

[Defining Resource Teams](#)

[Defining Resource Groups](#)

[Importing Resources](#)

Running an Audit Report

Resource Manager supports the ability to run an audit report detailing changes to resources and resource groups created with a defined date. For example, any changes made to new members of a group will display, but role change information

is not. This will provide an audit trail of the actions taken for specific groups, and resources. Perform the following steps to run an Audit report.

Note: Only the movement of a resource from a given group to another group will be tracked. Resources changing roles within the same group are not reported in the Audit Report.

Prerequisites

None

Steps

1. In the CRM Administrator responsibility, navigate to **Resource Manager > Others > Requests > Run.**

The Submit a New Request window opens.

2. Select the **Single Request** radio button and click **OK.**

The Submit Request window open.

3. Use the Name list of values (LOV) to select a report.

The Reports window opens.

4. Select Group Audit Report from the list of reports and click **OK.**

The Parameter window opens.

5. Enter parameters for the report.

In order for an Audit Report to run successfully, it is necessary to define both Report Based On and Date Range/No. of Days for the report. The report runs based on the information you enter for the following criteria.

- a. Report Based On
- b. Group
- c. Resource
- d. Updated By
- e. Date Range/No. of Days
- f. Start Date
- g. End Date

The report details will open in an HTML window along with a log file for the report.

Running a Group Structure Report

Resource Manager supports the ability to run a Group Structure report detailing any changes made to a specific the Parent or Child relationship of a resource group. This ability provides users with a reliable audit trail of the actions taken for a specific group. Group name changes, or any resource changes within the same group, will not be reported in this report. Perform the following steps to run a Group Structure report.

Prerequisites

None

Steps

1. In the CRM Administrator responsibility, navigate to **Resource Manager > Others > Requests > Run**.
The Submit a New Request window opens.
2. Select the **Single Request** radio button and click **OK**.
The Submit Request window open.
3. Use the Name list of values (LOV) to select a report.
The Reports window opens.
4. Select Group Structure Report from the list of reports and click **OK**.
The Parameter window opens.
5. Select the group you want to run the report on from the list of values (LOV) and click **OK**.
6. (Optional) Change the time frame the report will run by clicking **Schedule**.
The Schedule window opens.
7. Select when you want the report to run:
 - As soon as possible
 - Once
 - Periodically

- On specific days
8. Click **OK**.
 9. (Optional) Click **Options** to determine who should be notified when the report is complete and where you want to print the output.
 10. Click **Submit**.

A dialog opens confirming your request was submitted.

Viewing a Group Structure Report

A user can monitor the status of an audit report to see when it has been completed, and if it completed successfully. Perform the following steps to view your Group Structure report.

Prerequisites

You must first run a Group Structure Report successfully

Steps

1. In the CRM Administrator responsibility, navigate to **Resource Manager > Others > Requests > View**.

The Find Requests window opens.

2. Select the **All My Requests** radio button.
3. Click **Find**.

The Requests window opens.

4. Select the Group Structure Report.
5. Click **View Log** to display the results of the report.

The report details will open in an HTML window along with a log file for the report.

Administering Resource Manager

This topic group provides task-based procedures required for ongoing system maintenance and includes information on administration tools and utilities. This section covers the following topics:

- [Running Concurrent Programs](#)
- [Managing a Party Merge](#)

Running Concurrent Programs

Oracle recommends that the system administrator regularly run the concurrent programs, listed in the following table, on a regular basis, to synchronize data between the Resource Manager and following applications and maintain data integrity.

Resource Manager Concurrent Programs

Name	Parameters	Oracle Applications
Synchronize Employees	No: Synchronize only the employees that currently exist in Resource Manager. Yes: Synchronize all the employees that currently exist in Resource Manager <i>plus</i> all new active employees in Human Resources that have not been imported yet.	Human Resources
Synchronize Group Denorm	None	N/A
Synchronize Party and Partners	None	Accounts Receivable
Synchronize Supplier Contacts	None	Purchasing

Note: It is strongly recommended that an employee or party or supplier contact not have more than one entry in FND_USERS. If an employee linked to two or more FND_USERS is imported into Resource Manager, then the USER_ID column in JTF_RS_RESOURCE_EXTNS table randomly picks a value from FND_USERS for that employee.

Managing a Party Merge

Resource Manager supports the ability to register entities that reference parties in order to support party merges. This functionality supports the basic requirement to merge one party into another when duplicate parties have been identified. Each team must subscribe to the Trading Community Architecture (TCA) engine in order to utilize the party merge functionality.

The Party Merge functionality within the TCA is specifically designed to eliminate duplicate data in the Registry layer in order to keep the database accurate. Party information now can be merged to provide a consolidated view.

Resource Manager's registration of the entities that reference parties and defining the merge procedure allows the users to utilize the merge functionality. A batch program runs to determine the duplicate party records and merge them accordingly.

Using Notes

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

- [Creating Notes](#)
- [Finding Notes](#)

Creating Notes

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

Prerequisites

None

Steps

1. On the application menu bar, click **Tools** and select **Notes**.
The Notes window opens.
2. On the Notes toolbar, click **New**.
The application populates the source, owner, and date fields.
3. Enter the note information in the Notes field.
4. Optionally, click **More** to enter a note in the Detailed Notes window.
The Detailed Notes window holds textual notes up to 32 K in size.

5. Select note type and status from the LOV for each field.
6. Select from the LOV in the Related To field.
7. Enter a value in the Value field.

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

8. Save your note.

Note creation is complete.

Guidelines

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

See Also

[Finding Notes](#)

Finding Notes

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

Prerequisites

None

Steps

1. On the application menu bar, click **Tools** and select **Notes**.
The Notes window opens.
2. On the application toolbar, click **Find**.
The Find Notes window opens.
3. Select source and number from the LOV for each field and click **Search**.
The application populates the main note window with the note information.
4. Optionally, search for notes by owner, date, or note type.

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

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

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

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

The note search process is complete.

Guidelines

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

See Also

[Creating Notes](#)

Understanding Calendar

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

- [Calendar Overview](#)
- [Calendar Setup](#)
- [Calendar Datebook](#)

Calendar Overview

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

Calendar Setup

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

Calendar Datebook

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

Calendar Setup

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

What is Available Time?

Available time is defined using shifts and patterns.

What is a Shift?

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

What is a Shift Pattern?

A set of shifts can be set into a pattern.

For example:

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

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

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

What Is Non-available Time?

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

Non available time can be a number of entries:

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

- Personal or work appointment.

Calendar Datebook

In your Datebook you can view:

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

In addition, you can:

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

Using Calendar

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

- [Defining Availability](#)
- [Defining Non-Availability \(Exceptions\)](#)
- [Defining a Calendar](#)
- [Using the Assign Shift/Exceptions Window](#)
- [Assigning a Calendar to a Shift](#)
- [Assigning a Calendar to an Exception](#)
- [Assigning a Resource to a Calendar](#)
- [Creating Tasks and ToDos in a Calendar](#)
- [Viewing a Datebook](#)
- [Creating a ToDo List](#)

Defining Availability

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

Prerequisites

None

Steps

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

Defining Non-Availability (Exceptions)

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

Prerequisites

None

Steps

1. Navigate to the Exceptions screen.
2. In the Name field, create a name for your non-available work time.
3. In the Category field, select a category from the LOV. A category is a predefined type of exception.

4. In the Description field, enter a description of your exception.
5. Click **Save**. Your exception information is saved to the database.

Defining the Calendar

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

Prerequisites

None

Steps

1. Navigate to the Define Calendar screen.
2. In the Name field, select the calendar name from the LOV.
3. In the Type field, select the type of calendar you want to create from the LOV.
4. In the Description field, enter a description of the calendar type.
5. In the Effective Dates fields, enter the time period for the calendar.

Using the Assign Shift/Exceptions Window

You can use the Assign Shift/Exceptions window to:

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

Assigning a Calendar to a Shift

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

Prerequisites

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

Steps

1. Navigate to Assign Shift/Exceptions.

2. Select the Shifts tab.
3. In the Calendar Name field, enter a calendar name.
4. Enter the calendar description.
5. Enter the effective dates.
6. In the Shifts field, select your already defined shift from the LOV.

See also

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

[Defining Availability](#)

Assigning a Calendar to an Exception

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

Prerequisites

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

Steps

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

See also

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

[Defining Availability](#)

Assigning a Resource to a Calendar

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

Prerequisites

None

Steps

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

Guidelines

You can assign more than one calendar per resource.

Creating Tasks and ToDos in a Calendar

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

Prerequisites

You must have a personal calendar.

Steps

1. Navigate to **Control Tower**.
The Control Tower form opens with resources displayed on the Plan Board tab at the bottom of the form.
2. Right-click a resource name to open a pop-up menu.
3. Select Show Calendar to open the calendar for the selected resource name.
The Calendar opens to display tasks and ToDos.

4. (Optional) Select **Task** and click **New** to create a task.
The Tasks form opens.
See [Creating and Updating Tasks](#) for details.
5. (Optional) Select **ToDo** and click **New** to create or edit a ToDo.
The Create/Edit Todo form opens. Fill in the appropriate information and click **OK**.
See [Creating a ToDo List](#) for details.
6. Save your changes and close the Calendar.

Viewing the Datebook

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

Prerequisites

None

Steps

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

Creating a ToDo List

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

Prerequisites

None

Steps

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

Using Task Manager

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

- [Creating and Updating Tasks](#)
- [Setting Dependencies for Tasks](#)
- [Assigning and Scheduling Resources](#)
- [Scheduling Recurring Tasks](#)
- [Tracking Planned, Scheduled, and Actual Dates](#)
- [Setting Task Flags](#)
- [Documenting Multiple Contact Information](#)
- [Tracking a Task Record](#)
- [Launching Task Workflow](#)
- [Linking Tasks to Source Documentation](#)

Creating and Updating Tasks

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

Prerequisites

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

Steps

1. Navigate to Task Manager.
2. In the Find Tasks window, click **New**.
The Tasks window opens.
3. Use one of the following procedures to create a task:
 - a. Select the template information from the LOV for the required fields, and click **Create Tasks**.
 - b. Click **Create Task from Template** to use a template.
The Create Tasks from Template Group window opens.
Enter your basic task information into the required fields by selecting from each LOV.
4. Click **More**.
The Task Details window opens.
5. In the Resource tab, define Requirements by selecting from the LOV for each field.
6. In the Dependencies tab, enter the task dependencies by selecting from the LOV for each field.
7. In the References tab, enter the reference objects by selecting from the LOV for each field.
8. In the Recurrences tab, enter the recurrence rules by selecting from the option buttons and the LOV for each field.
9. In the Resources tab, enter the resource assignments by selecting from the LOV for each field.
10. Save your task.
The new task number appears in the task spread table.
11. If you want to update a task, then perform the following steps:
 - a. Navigate to Task Manager.
 - b. In the Find Tasks window, click **Find**.
 - c. The Tasks window opens.
 - d. Update information.

- e. Save your changes.

Guidelines

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

See Also

[Designing Task Templates](#)

[Launching Task Workflow](#)

Setting Dependencies for Tasks

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

Prerequisites

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

Steps

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

Guidelines

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

See Also

[Creating and Updating Tasks](#)

Assigning and Scheduling Resources

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

Prerequisites

None

Steps

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

9. Save your task.

Resource assignment and scheduling is complete.

Guidelines

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

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

See Also

[Creating and Updating Tasks](#)

Scheduling Recurring Tasks

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

Prerequisites

None

Steps

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

See Also

[Creating and Updating Tasks](#)

Tracking Planned, Scheduled, and Actual Dates

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

- Task creation
- Resource reservation
- Task completion

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

Prerequisites

None

Steps

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

Guidelines

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

See Also

[Creating and Updating Tasks](#)

[Assigning and Scheduling Resources](#)

Setting Task Flags

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

Prerequisites

None

Steps

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

Guidelines

Optionally, design templates with predetermined flags.

See Also

[Creating and Updating Tasks](#)

[Designing Task Templates](#)

The following table defines each task flag.

Task Flag Definitions

Task Flag	Definition or Action
Auto Notification	Launch notification workflow automatically.
Milestone	Indicate task importance.

Task Flag Definitions

Task Flag	Definition or Action
Private	Restrict task access to non-task owners.
Publish	Allow task notification to non-task owners.
Restrict Closure	Require the completion of a child task before a parent task.

Documenting Multiple Contact Information

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

Prerequisites

None

Steps

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

Guidelines

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

See Also

[Creating and Updating Tasks](#)

[Setting Dependencies for Tasks](#)

Tracking a Task Record

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

Prerequisites

None

Steps

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

Guidelines

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

See Also

[Creating and Updating Tasks](#)

Launching Task Workflow

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

Prerequisites

None

Steps

1. Navigate to Task Manager.
2. In the Find Tasks window, find or create a task.
The Tasks window opens.
3. Click **More**.
The Task Details window opens.
4. Select the Resources tab.
5. Create an Assignee by filling in the fields from the LOV.
6. Click **OK**.
7. In the Task Details window, click **Launch Workflow**.
8. Save your task.

Workflow e-mails the task owner and resource scheduler with the task creation or update information.

See Also

[Creating and Updating Tasks](#)

[Setting Task Flags](#)

Linking Tasks to Source Documentation

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

Prerequisites

None

Steps

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

Guidelines

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

See Also

[Creating and Updating Tasks](#)

Understanding Interaction History

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

The topics covered in this group include:

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

Interaction History Overview

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

What is an Interaction?

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

What is an Activity?

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

What is a Media Item?

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

How does Interaction History Work?

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

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

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

Interaction History's Dependencies and Integration

Interaction History is integrated with the following Oracle CRM applications.

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

Interaction History Features

Within Interaction History, you can view customer-agent interactions, activities and notes. Interactions can be filtered by customer, agent, campaign, date range, and account number. Activities can be filtered by customer, agent, activity type, media type, and date range. Notes that exist for customer-agent interactions and activities are available for viewing in Interaction History.

Using Interaction History

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

The topics covered in this group include:

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

Searching Interactions

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

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

Prerequisites

A customer-agent interaction must exist in Interaction History.

Steps

1. Navigate to the Interactions Filtering Criteria Tab, enter the criteria for searching interactions in any of the following fields.
2. In the Customer field, enter the customer's name.
3. In the Agent field, enter the agent's name.
4. In the Campaign field, enter the campaign name.
5. In the Date from and to fields, click the LOV button in each field to display the calendar. Click the date on the calendar from which to begin the search. You may also specify the time. Click **OK**.

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

6. Click the date on the calendar to end the date range. You may also specify the time. Click **OK**.

The date will display in the Date to field.

7. In the Account field, enter the customer's account number.
8. Click the **Search** button.

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

Guidelines

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

Viewing Interactions

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

Prerequisites

A customer-agent interaction must exist in Interaction History.

Steps

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

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

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

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

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

Viewing Interaction Notes

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

Prerequisites

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

Steps

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

Searching Activities

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

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

Prerequisites

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

Steps

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

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

7. Click the date on the calendar to end the date range. You may also specify the time. Click **OK**.

The date will display in the Date to field.

8. Click the **Search** button.

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

Guidelines

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

Viewing Activities

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

Prerequisites

A customer-agent interaction must exist in Interaction History.

Steps

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

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

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

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

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

Viewing Activity Notes

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

Prerequisites

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

Steps

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

Administering Interaction History

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

The topics covered in this group include:

- [Overview of Interaction History Administration](#)
- [Defining Outcomes](#)
- [Defining Results](#)
- [Pairing an Outcome With a Result](#)
- [Pairing a Result with a Reason](#)
- [Defining a Wrap-Up](#)

Overview of Interaction History Administration

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

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

Defining Outcomes

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

Steps

1. In the CRM Administrator responsibility, navigate to Interaction History Administration.

2. Select the Outcomes tab.

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

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

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

4. Press the Up or Down arrow keys to review all the pre-defined values. You can also enter your own values in either field.

5. If you need to use Numeric Values, select the **Telephony Related** check box.

Select either Success option—Yes or No—and enter the appropriate Numeric Value. Yes has a range of 1 to 100; No has a range of 101 to 255.

6. Choose whether the outcome requires a Private or Public callback.

7. Choose **File > Save and Proceed** to save the outcome definition.

Guidelines

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

Defining Results

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

Steps

1. In the CRM Administrator responsibility, navigate to Interaction History Administration.

2. Select the Results tab.

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

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

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

4. Click the Up or Down arrow keys to review all the pre-defined values. You can also enter your own values in either field.

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

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

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

Pairing an Outcome with a Result

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

Note: Each Outcome-Result pair must be unique.

Steps

1. In the CRM Administrator responsibility, navigate to Interaction History Administration.

2. Select the Outcome-Results tab.

3. Select a value from the Outcomes list.
4. Select a value from the Results list.
5. Choose **File >Save and Proceed** to save the Outcome-Result pair.

Guidelines

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

See Also

[Defining Outcomes](#)

[Defining Results](#)

Pairing a Result with a Reason

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

Note: Each Result-Reason pair must be unique.

Steps

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

Guidelines

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

See Also

[Defining Results](#)

Defining a Wrap-Up

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

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

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

Steps

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

Understanding Fulfillment

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

- [Fulfillment Overview](#)
- [What is a Fulfillment?](#)
- [What is a Query?](#)
- [What are Datasource Files?](#)
- [Terms and Definitions](#)

Fulfillment Overview

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

Fulfillment is defined as an automated way to send information to customers electronically through e-mail. It provides the ability to immediately satisfy a customer's requests for information, literature, and other correspondence. Customer Service Representatives handle a variety of requests ranging from product and service inquiries, pricing questions, billing inquiries, and general customer care issues. Many of these requests will result in some dissemination of literature, collateral, forms of application, letters, or correspondence to the customer. Fulfillment provides the ability for call center administrators, mobile field

representatives, marketing managers, customer care representatives, and other service agents to respond to different customer needs quickly and easily using e-mail.

Some key features of Fulfillment include:

- Providing automated delivery of information to customers using e-mail
- Supporting multiple types of customizable Fulfillments used in CRM applications such as documents, templates, and collateral
- Prioritizing requests
- Updating customer information through Interaction History
- Merging data into formatted outgoing e-mails to create consistent personalized messages
- Using Oracle Workflow Builder to launch a request, manage the request as it moves through the Fulfillment cycle, monitor the status of each Fulfillment request, and notify users about the disposition of particular events

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

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

What are Fulfillments?

The following table describes the five types of available fulfillments.

Types of Fulfillments

Type	Description
Fulfillment	A Fulfillment is information distributed to people through e-mail such as a thank you e-mail for inquiring about services a company provides.
Template	A template is a predefined package of electronic brochures, newsletters, or other customer-oriented information that an agent sends to customers in response to a request for information such as a brochure of the services that the company provides.

Types of Fulfillments

Type	Description
Merged Data	Merged data is a the specific chunk of data that has been taken from several sources and merged together. For example, if a company wants to send a thank you email to everyone that has inquired about their company, the resulting merged data is the query retrieving all customers that have inquired about the company and associated with a master document.
Master Document	A Master Document is a dynamic HTML file or HTML Aggregate Zip file. If documents contain merged data (dynamic), it must be passed to an API and merged into the document or the merged data must come from a query.
Collateral	Collateral is a static Fulfillment document that does not contain merged data.

What is a Query?

A query is a SQL statement that collects specific kinds of data from the database when fulfilling a request. From the query window, you can create, update, or restore queries along with creating the Datasource files where the results of the query are stored.

Queries are used for generating and populating data in master documents dynamically. Dynamic information comes from the query and the associated bind variables and is a part of the master document. The bind variables contain the data that is required to process a Fulfillment query. The bind variables correspond to the items required by the query that serves the template specified. These are generally items listed in the WHERE clause of the SQL query.

For example, the bind variable for the SQL statement:

```
Select person_last_name lname from jtf_contact_points WHERE person_first_name = :fname is, fname.
```

What are Datasource Files?

A Datasource file is a text file that contains tab-separated merge fields. Once the query and datasource file have been created, upload the Datasource file to the server. Then, the Datasource file can be used in a Master Document and sent out as part of a Fulfillment request. Use datasource files to create Master Documents.

Terms and Definitions

The following table describes Fulfillment terms and definitions.

Fulfillment Terms and Definitions

Term	Description
Administrator	A person at a management level who is responsible for creating and managing Fulfillment templates.
Agent or User	The person who initiates a Fulfillment request from within a CRM application. Agents or users usually interact directly with customers, either on the phone or face-to-face. In Web-based self-service applications, a customer or prospect may be the requesting agent.
Attachment	A document that has been generated by another application and included as part of a Fulfillment request. Attachments allow information such as bank account activity, service request status, credit information, or invoices to be sent to a customer. Attachments are static documents.
Collateral	Informational material created by a customer organization such as marketing, and sometimes pre-printed. Collateral is static; no merge can be done with collateral. Collateral may need to be inventoried or charged to a corporate cost center or customer. Marketing refers to collateral as deliverables.
Customer	A person who has purchased a product or service.
Master Document	A dynamic document containing merges fields that are filled with data during the execution of a Fulfillment request. Master documents may be cover letters or other correspondence that is written for a customer or prospect. Master Documents may be viewed by users but cannot be overwritten. They do not include merged documents; therefore, they are static documents.
Fulfillment Request	An action that results in providing information to a customer or prospect. Information is delivered to the customer as email.
Fulfillment Server	The Fulfillment server, a Java-based multi-threaded server, processes the requests, manages customer data, merges data into Master Documents, dispatches final output, and logs completed request in Fulfillment History table, as well as, write to Interaction History tables if the Party ID is passed.

Fulfillment Terms and Definitions

Term	Description
Group	A set of agents or users usually related by workgroup, function or department. Each user must belong to at least one group and have exactly one default group. These groups are associated with a Fulfillment server.
Integration points	CRM Fulfillment integrates with other application products through APIs included with the core Fulfillment product.
Items	The contents of a Fulfillment request. Items are selected from the list of all possible documents and collateral material available to the user from Fulfillment template.
Output	The delivery medium of a Fulfillment request. Currently only e-mail is supported.
Prospect	A person who is a candidate to purchase a product or service.
Query	A SQL statement or list created by the administrator (or an external other) that is used to merge specific data with a master document. Used for batch lists, mass mailings, or mail blitzes.
Summary Screen and Detail Screen	Summary screens contain lists of things such as all open Fulfillment requests, all available campaigns, or all output devices on a server. A Detail screen displays information about a specific open request, campaign, or output device.
Workflow Template	Each Fulfillment template contains a workflow template that manages the flow (direction), timing, approvals, and notifications associated with specific Fulfillment requests. If a particular Oracle customer requires a workflow template outside of the scope of the pre-defined template, Workflow builder needs to be used (by the customer or by Oracle Consulting) to create custom templates.
Fulfillment Administrative Console	Used to configure Fulfillment servers, group, templates, queries, and locate request statuses and histories.
Fulfillment Agent	A set of agent Java Server Pages (JSPs) that are provided to CRM applications for creating basic Fulfillment requests.

Administering Fulfillment

This topic group provides task-based procedures required for ongoing system maintenance and includes information on administration tools and utilities. This section covers the following topics:

- [Getting Started](#)
- [Logging onto Fulfillment](#)
- [Using the Quick Find Search Feature](#)
- [Viewing or Updating Listed Items](#)
- [Updating a Fulfillment Template](#)
- [Changing a Template's Availability](#)
- [Creating a Query](#)
- [Creating a Datasource File](#)
- [Downloading a Datasource File](#)
- [Updating a Query](#)
- [Uploading a Master Document](#)
- [Associating a Master Document with a Template](#)
- [Removing a Master Document from a Template](#)
- [Removing Collateral from a Template](#)
- [Uploading a Master Document to the Marketing Encyclopedia System](#)
- [Creating New Groups](#)
- [Adding a New Group to the Server](#)

- [Adding Agents to a Group](#)
- [Removing Agents from a Group](#)
- [Modifying Groups](#)
- [Modifying Fulfillment Servers](#)
- [Reconfiguring Email Servers](#)
- [Reconfiguring Fax Servers](#)
- [Reconfiguring File Servers](#)
- [Reconfiguring Printers](#)
- [Modifying a Group-Server Association](#)
- [Removing Output Devices and Groups.](#)
- [Checking a Request Status](#)
- [Viewing Requests](#)
- [Canceling a Request](#)
- [Resubmitting a Fulfillment Request](#)

Getting Started

Now that Fulfillment functionality has been defined, the process of how to administer Fulfillment should be addressed.

The steps involving the Fulfillment process include:

1. Creating a template.
2. Creating a query.
3. Creating a datasource file (if using merged data).
4. Uploading a master document.
5. Associating a master document to templates.
6. Sending out Fulfillments.

Note: Click on any highlighted column link in any tab to display the information in the opposite order.

Logging in as the Fulfillment Administrator

Prerequisites

You must have administrator responsibilities.

Steps

1. To open the `jtflogin.jsp` page, enter its URL:
`http://<host.domain_name>:<port>/<docroot>/jtflogin.jsp`
2. Enter your user ID and password in the appropriate fields
3. Use the following for the variable parameters:
 - `host.domain_name`: The hostname where the Apache Server is installed. For example, `apo23sum.us.oracle.com` is a fully qualified host name.
 - `port`: The port on which the Apache Web listener is configured.
 - `docroot`: The document root defined for the Apache Server that contains the JSP pages.

Once you log in to Fulfillment, the Fulfillment Administrator home page is the default page.

4. Use the Fulfillment Administration windows to perform various functions.

The following table describes the tabs found in the Fulfillment interface.

Guidelines

Fulfillment Tab Descriptions

Tab	Description
Home	Use this tab to access the Fulfillment Administrator home page. Use this window to access servers, groups, templates and queries. Additionally, use the Fulfillment Administrator Status windows to view history and status' of requests.
Server	Use this tab to create and modify server information, remove groups as well as add and remove agents from those groups. You can also add and remove additional email servers to an existing server from this tab.
Group	Use this tab to create and modify groups, add agents to groups, and remove agents from groups. You can also change the server associated to the group.

Fulfillment Tab Descriptions

Tab	Description
Template	Use this tab to view, create and modify a template. You can also associate a master document or collateral to a template by uploading the document to the Fulfillment server.
Query	Use this tab to generate and populate data in Master Documents dynamically. In order to create a query, the administrator must have thorough knowledge of SQL*Plus and must identify the bind variables that are needed for the query.
Status	Use this tab to re-submit a Fulfillment request or view the history of a request or the status of requests.

See Also

[Setting Up a Fulfillment Administrative User](#)

Using the Quick Find Search Feature

Perform the following steps to use the Quick Find search feature in Fulfillment.

Prerequisites

None

Steps

Note: The Quick Find search feature is case sensitive.

1. Using the Quick Find drop-down list, select search criteria:
 - jtffmserver
 - jtffmgroup
 - jtffmquery
 - jtffmtemplate
 - jtffmstatus
2. Enter a keyword for the search.

For example, if you are searching `jttfmggroups`, enter the group name. To search for all groups, enter `%`.

3. Click **Go**.
4. Click on any item to display the details.

Viewing or Updating Listed Items

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

Updating a Fulfillment Template

For each template, you can change the Name, Status, and Description. Perform the following steps to update a template.

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

Prerequisites

A template must first exist and have availability assigned to it.

Steps

1. Select the Template tab.
The Template window opens.
2. (Optional) Use the list of values (LOV) to organize existing templates in three different views (all templates, active templates, or inactive templates).
3. In the Template window, choose the name of the template that you want to edit.
The View Template window opens.
4. Edit the information as necessary. You cannot edit the name of the template.
5. (Optional) If you make an error, click **Restore** to revert back to the original information.
6. Click **Update**.

Changing a Template's Availability

If you want to prevent a template from being used for Fulfillment requests, then change the template's status. For example, you can change an inactive template to active if you want it to be available or change an active template to inactive. Perform the following steps to change the status of a template.

Prerequisites

A template must first exist and have availability assigned to it.

Steps

1. Select the Template tab.
2. In the Template Name column, click the template that you want to change.
The View Template window opens.
3. In the Status drop-down list, choose the appropriate Status: **Active** or **Inactive**.
4. Click **Update**.

Creating a Query

A query is an SQL statement that directs Fulfillment to collect specific kinds of data from the database when fulfilling a request. Perform the following steps to create a query.

Prerequisites

- You must identify the bind variables.
- You must identify the fields (columns and aliases) you want to associate with the query.
- You must identify what master document the query will be associated with.

Steps

1. Select the Query tab and click **Create**.
The Create Query window opens.
2. Enter a unique name for the new query in the Name field.
3. Enter a description for the new query in the Description field.

4. Enter the SQL query string in the Query String field.
See the [SQL Query Guidelines](#) following for details on creating a query.
5. Click **Create**.
The Queries window opens and the newly created query displays in the Queries list.

See also

[Updating a Query](#)

SQL Query Guidelines

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

Use the following syntax when creating an SQL query:

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

In the above code:

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

For example:

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

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

The window opened by the data source utility would then show the following in a plain background window with nothing else:

```
lname      CustNumb    cdate      phone
```

Merge fields should match exactly with the Master Document.

Creating a Datasource File

A Datasource file is a text file that contains tab-separated merge fields that have been obtained by a query. Use the datasource file to obtain the columns available from the query so that they can be used as merged fields. Perform the following steps to create a datasource file.

Prerequisites

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

Steps

1. Select the Query tab.
2. In the Query window, click **Datasource**.
The Create Datasource File for Query window opens.
3. From the Query Name drop-down list, choose the query. For example, select the Query that was just created.
4. Click **Create**.
The Create Datasource window opens.
5. Right-click the **Datasource** link.
The Datasource appears in a separate browser window.

Downloading a Datasource File

Before a datasource file can be used in a master document, it must be downloaded. Perform the following steps to download a datasource file.

Prerequisites

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

Steps

1. From the browser File menu, select **Save As**.
2. Choose plain text file (.txt) as the file type.
3. Navigate to the desired save location.
4. Click **Save**.
5. Close the browser window.

Updating a Query

Perform the following steps to change the parameters or other specifications of a query.

Prerequisites

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

Steps

1. Select the Query tab.
2. In the Query name column, click the query you want to update.
The Update Query window opens.
3. Update the information as necessary. The Query name cannot be edited.
4. (Optional) If you make an error, click **Restore** to revert back to the original information.
5. Click **Update**.

Uploading a Master Document

Note: You cannot upload collateral in Fulfillment. You can only upload a Master Document. Collateral is created by Marketing and uploaded through the Marketing Online application.

A Master Document contains text that is used repeatedly, such as a form or a contract. You create master documents in a word processing application. A Master Document can have one of the following extensions:

- .zip
- .html
- .pdf

After creating a master document with the HTML editor of your choice, upload it to make it available for Fulfillment requests. When you upload a Master Document, it is stored in the Marketing Encyclopedia System (MES).

To upload a Master Document, see [Uploading a Master Document to the Marketing Encyclopedia System](#).

Associating a Master Document to a Template

Note: If the Master Document in HTML was originally created in Microsoft Word, you must use the Notepad or an HTML text editor to remove information that is proprietary to Microsoft from the HTML header. See [Uploading a Master Document to the Marketing Encyclopedia System](#).

A template is a pre-defined package of brochures, newsletters, or other customer-oriented information that an agent locates and directs to customers in answer to a Fulfillment request. Use the following procedure to associate one or more master documents to a template.

Prerequisites

A template must exist.

One or more master documents must be available in the list of Master Documents.

Steps

1. Select the Template tab.
The Templates window opens.
2. In the Template Name column, click the template that you want to associate to a master document.
The View Template window opens.
3. Click **Master Document** in the left frame.
The View Template, Master Documents window opens.
4. Choose **Go** to begin a search of master documents.
The Master Document window opens.
5. Enter the initial letter of a master document with % and click **Search**.
6. Click on the name of the Master Document.
The View Template window opens and the selected Master Document is now associated with the Template.
7. Click **Update**.

Removing a Master Document from a Template

Perform the following steps to remove a master document from a template.

Prerequisites

A template must exist and have a master document associated with it.

Steps

1. Select the Template tab.
2. In the Template Name column, click the template that is associated with the Master Document.
3. Click **Master Document** in the left frame.
4. Select the **Remove** check box beside the master template that you want to remove.
5. Click **Update**.
The Master Document is no longer associated with the template.

Removing Collateral from a Template

Perform the following steps to remove collateral from a template.

Prerequisites

A template must exist and have collateral associated with it.

Steps

1. Select the Template tab.
2. In the Template Name column, click the template that is associated with the Master Document.
3. Click **Collateral** in the left frame.
4. Select the **Remove** check box beside the collateral that you want to remove.
5. Click **Update**.

The collateral is no longer associated with the template.

Uploading a Master Document to the Marketing Encyclopedia System

After Creating a master document, upload the Master Document to the Marketing Encyclopedia System (MES) where it will be available for Fulfillment requests.

Perform the following steps to upload a Master Document to the MES.

Prerequisites

- The Master Document must be an HTML file or an Adobe Acrobat PDF file.
- In HTML files, remove from the HTML code any propriety information inserted by the word processor, otherwise the server will not process the document. For example, saving a Microsoft Word document as HTML inserts Microsoft propriety information in the <HTML> header tag, that is, a line in the header stating

```
<META NAME = "Generator" CONTENT="Microsoft Word 97>
```

To remove such propriety information, use a generic text editor such as Microsoft Notepad or WordPad

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

Steps

1. Select the Template tab and click **Master Document**.
The Master Document window opens.
2. Click **Upload**.
3. Enter the file name or click **Browse**.
The File Upload dialog box opens.
4. Choose the Master Document file and click **Upload**.
The Update Master Document window opens.
5. (Optional) In the **Description** field, type a description of the Master Document.
6. From the Query drop-down list, choose a query to associate with the Master Document.
7. Click **Upload**.
The Master Document uploads to MES.

See also

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

Creating New Groups

To create a new group, use the following procedure.

Prerequisites

None

Steps

1. Select the **Group** tab and click **Create**.
The Create Group window opens.
2. Enter a unique name for the Group in the Group Name Field.
3. Enter a description for the group in the Description field.
4. Use the drop-down list to select the server where you want to add the group.
5. To add agents, click **Go** and select the agent to add to the group.
6. Click **Create**.

The new group is added to the list in the groups window.

Adding a New Group to the Server

Perform the following steps to add a newly created group to a Fulfillment server.

Prerequisites

A group must already exist in the system.

Steps

1. Select the Server tab.
2. In the Server Name column, click the server where you want to add the group.
The General window opens.
3. Click **Groups** in the left frame.
The Groups window opens.
4. Select **Add Group**.
The Select Group window opens.
5. From the drop-down list, choose the group to add to the Fulfillment server.
6. Select **Go**.

The Add Group window opens.

7. In the Output Devices tables, select the output devices to associate with this agent group. The output devices should be in a physical location accessible to the agents.
8. To make output devices available, click **Create**.
9. Click **Save** when you are done adding output devices.

Adding Agents to a Group

Perform the following steps to add agents to a group.

Prerequisites

None

Steps

1. Select the Group tab.
2. In the Group Name column, click the name of the group to which you want to add agents.
The Group Detail window opens.
3. In the Agents table, click **Go**.
The Select Agents window opens.
4. Select an agent from the list or enter % and an agent's name and click **Search**.
The Group Detail window opens and the new agent is listed in the Agents table.
5. Click **Update**.
6. Repeat these steps to add additional agents to a group.

See also

[Removing Agents from a Group](#)

[Creating New Groups](#)

[Modifying Groups](#)

[Modifying a Group-Device Association](#)

Removing Agents from a Group

Perform the following steps to remove agents from a group.

Prerequisites

None

Steps

1. Choose the **Group** tab.
The Groups window opens.
2. In the Group Name column, click the name of the group to which you want to remove an agent.
The Group Detail window opens.
3. In the Agents table, select the check box beside the Agent's name you want to remove.
4. Click **Update**.
The agent is removed from the group.

Modifying Groups

Perform the following steps to modify a group.

Prerequisites

None

Steps

1. Select the **Group** tab.
The Group Details window opens.
2. In the Group Name column, click the name of the group that you want to modify.
The group details window opens.
3. Edit the following information as necessary:
 - Description

- Server names
 - Agent Information
4. Click **Update** to save the information to the database.
The View Groups window opens.

See also

[Modifying Fulfillment Servers](#)

Modifying Fulfillment Servers

Perform the following steps to modify a Fulfillment server.

Prerequisites

None

Steps

1. Select the Server tab.
2. In the Server Name column, click the name of the server that you want to modify.
The General window opens.
3. Edit the following information as necessary:
 - Start Time
 - Shutdown time
 - Request Queue Name
 - Response Queue Name
 - Description
4. Click **Continue**.
The Email Servers window opens.
5. Click **Update** to save the new configuration.

See also

[Reconfiguring Email Servers](#)

Reconfiguring File Servers

Reconfiguring Email Servers

Perform the following steps to reconfigure an email server.

Note: You can only have one Email Server associated with a Group.

Prerequisites

None

Steps

1. Select the Server tab.
2. In the Server Name column, click the name of the server that you want to reconfigure.
The General window opens.
3. Click **Email Servers** in the left frame.
The Create Email Server window opens.
4. Edit the following information as necessary:
 - Physical name
 - Incoming Server
 - Outgoing Server
5. To add a new email server, click **Add Email Server**.
6. Click the **Output ID** link to edit the email server details in the Create Email Server window.
 - a. Enter the Email Server Name
 - b. Enter the Return Address
 - c. Enter the Incoming Server
 - d. Enter the Outgoing Server
7. Click **Save**.

8. Click **Update**.

Reconfiguring Fax Servers

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

Reconfiguring File Servers

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

Reconfiguring Printers

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

Modifying a Group-Server Association

Perform the following steps to remove an association between a device server and a group.

Prerequisites

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

Steps

1. Select the **Server** tab,
2. In the **Server Name** column, click on the server to which the group is associated.
The **General** window opens.
3. Click the **Groups** link in the left frame.
4. The **Groups** window opens with a list of the groups associated to the Fulfillment server with the device servers to which each group is associated.

5. Select the **Remove** check box beside the group to remove.
6. Click **Update** to complete the process.

Removing Output Devices and Groups

Perform the following steps to remove an output device or agent group.

Prerequisites

None

Steps

1. Select the Server tab.
2. In the Server Name column, click the server you want to remove.
The General window opens.
3. Click the **Groups** link in the left frame.
The Groups window opens.
4. Select the **Remove** check box next to the group you want to delete.
5. Click **Update**.
The group is removed from the server.

Checking a Request Status

Perform the following steps to check the status of a request.

Prerequisites

None

Steps

1. Select the Status tab.
2. In the Request Identifier column, click the number of the request to which you want to see the status.
The View Status window opens detailing the status of the request.

Viewing Requests

Perform the following steps to view a request.

Prerequisites

None

Steps

1. Select the Status tab.
2. Using the drop-down list, select the view you wish to see:
 - Submitted
 - Re-submitted
 - In Process

The information appears in the status window.

Canceling a Request

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

Note: Once the server extracts the request from the queue, the request cannot be cancelled.

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

Re-submitting a Fulfillment Request

Perform the following steps to resubmit a Fulfillment request.

Note: You can resubmit a successful request.

Prerequisites

You must have already created the Fulfillment request.

Steps

1. Select the Status tab and click **History**.

In the row that contains the request identifier that you want to resubmit, click **Re-submit**.

Understanding Assignment Manager

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

- [Overview of Assignment Manager](#)
- [Assigning Process](#)

Overview of Assignment Manager

Use Assignment Manager to:

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

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

For more detail see:

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

Ownership Assignment

When you create a document or a task, you must assign an owner to it to ensure action is taken. A document owner can be a service manager, expediter, marketing,

service, or sales person. A task owner can be a planner, dispatcher, or service representative. An owner is defined as a resource within Assignment Manager.

Resource Availability Assignment

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

Additional Features of Oracle Scheduler

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

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

Options for Assigning Ownership and Availability

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

The following table describes the two options for assigning ownership.

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

The following table describes the four options for assigning availability.

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

Assigning Process

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

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

Assignment Manager Dependencies

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

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

Assignment Manager Selection Criteria

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

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

The Effect of Customer Selections

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

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

See Also

[Selecting Assignment Criteria](#)

Using Assignment Manager

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

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

Assigning Options

Choose one of the following options for assigning tasks:

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

Assigning Unassisted

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

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

Prerequisites

None

Steps

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

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

4. Double-click on the preferred resource.

The selected resource appears below the Gantt chart.

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

Assigning Assisted

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

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

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

Prerequisites

None

Steps

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

The calendar for the qualified resource appears.

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

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

3. Double-click on the resource with the preferred Start and End Time.
The selection appears below the calendar.
4. Click **OK** to commit the assignment or click **Cancel** to leave Assignment Manager without changes.

Assigning Intelligent

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

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

Prerequisites

You must have Oracle Scheduler installed.

Steps

1. Select the **Intelligent** option from the Selection Criteria.
The Gantt chart for the qualified resource or resources displays a related cost.
2. Adjust the Selection Criteria and click **Search** when the Gantt chart is empty.
For more information, see [Selecting your Assignment Criteria](#).
3. Double-click on the resource with the preferred Start and End Time.
The selection appears below the calendar.
4. Click **OK** to commit the assignment or click **Cancel** to leave Assignment Manager without changes.

Guidelines

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

Assigning with the Window To Promise

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

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

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

Prerequisites

You must have Oracle Scheduler installed.

Steps

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

Guidelines

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

Selecting Assignment Criteria

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

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

Understanding Escalation Management

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

The topics covered in this group include:

- [Overview](#)
- [Workflow Notifications](#)
- [Escalation Territories](#)

Overview

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

Escalation Management features include:

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

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

An escalation is managed by creating an escalation document, assigning an escalation owner, defining the actions needed to resolve the escalation, and communicating the progress. Once a situation is de-escalated, the escalation closure note is captured and a final communication is sent to the contacts involved.

Workflow Notifications

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

Notifications are sent for the following reasons:

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

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

Typical recipients include:

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

Escalation Territories

An escalation territory is a placeholder for resources that you want to put into service under certain conditions. Escalation territories are defined in Territory Management. Ensure that at least one resource is identified in the Catch All Escalation Territory.

See also

View the following topics in Territory Manager for additional information:

- [Basic Territory Building Blocks](#)
- [Viewing Escalation Territories](#)[Creating Escalation Territories](#)

Using Escalation Management

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

The following topics are covered in this section:

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

Creating Escalations

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

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

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

See also

[Managing a Service Request Escalation](#)

[Managing a Task Escalation](#)

[Managing a Defect Escalation](#)

Managing a Service Request Escalation

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

Use this procedure to manage a service request escalation.

Prerequisite

A service request has been entered into the system.

Steps

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

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

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

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

4. Select a Status.
5. Select a Reason.
6. Enter a target date.
7. Select the escalation level.
8. Assign the escalation to yourself or another existing resource using one of the two methods listed:
 - a. Select a resource from the LOV.

Click **Assign** to choose an escalation owner from the Assignment Manager.

- b. Click **Search**.

Note: Only click **Search** in the Selection Criteria region. Leave the other fields as defaulted.

The resources from the Escalation Territory(s) of the escalated document(s) become visible. If there are no Escalation Territories set up, then the resources from the Catch All territory display.

Select the resource name and click **OK**.

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

There can be more than one contact, but only one requester.

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

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

Managing a Task Escalation

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

Use this procedure to manage a task escalation.

Prerequisite

A task has been created and entered into the system.

Steps

1. Navigate to **Tasks**.
2. Find the task to be escalated.
3. From the Tools menu, choose **Request Escalation**.
The Escalations window appears.
4. Verify that the task has never been escalated.
The escalation level and owner display on the main Task screen.
5. Enter the task number into the Number field in the Reference Documents tab.
6. Select a Status.
7. Select a Reason.
8. Enter a target date.
9. Select the escalation level.
10. Assign the escalation to yourself or another existing resource using one of the two methods listed:
 - a. Select a resource from the LOV.
Click **Assign** to choose an escalation owner from the Assignment Manager.
 - b. Click **Search**.

Note: Only click **Search** in the Selection Criteria region. Leave the other fields as defaulted.

The resources from the Escalation Territory(s) of the escalated document(s) become visible. If there are no Escalation Territories set up, then the resources from the Catch All territory display.

Select the resource name and click **OK**.

11. Enter a situation summary in the Escalation Summary field.
12. Enter the name of the customer or employee contact (requester), and select the **Requester** check box.
There can be more than one contact, but only one requester.
13. (Optional) Enter any additional contact points.

14. Save the escalation, and make a note of the displayed escalation number.
Query the escalated task to view the updated escalation level.

Managing a Defect Escalation

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

Use this procedure to manage a defect escalation.

Prerequisite

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

Steps

1. From within the Customer Support Responsibility, choose **Manage Escalations**.
The Escalations window appears.
2. Enter the desired information (no information will default into the form).
3. Enter Defect into the Documents field in the Reference Documents tab.
4. Select a Status.
5. Select a Reason.
6. Enter a target date.
7. Select the escalation level.
8. Assign the escalation to yourself or another existing resource using one of the two methods listed:
 - a. Select a resource from the LOV.
Click **Assign** to choose an escalation owner from the Assignment Manager.
 - b. Click **Search**.

Note: Only click **Search** in the Selection Criteria region. Leave the other fields as defaulted.

The resources from the Escalation Territory(s) of the escalated document(s) become visible. If there are no Escalation Territories set up, then the resources from the Catch All territory display.

Select the resource name and click **OK**.

9. Enter a situation summary in the Escalation Summary field.
10. Enter the defect owner name in the contact field.
11. Save the escalation, and make a note of the displayed escalation number.

Using Dynamic Tables

This topic group provides process-oriented, task-based procedures for working with the embedded spreadtables.

This section covers the following topics:

- [Dynamic Tables](#)
 - [Sorting](#)
 - [Finding](#)
 - [Copying and Exporting](#)
 - [Customizing Layout](#)

Dynamic Tables

Dynamic tables provide flexibility in displaying and handling data. Use them to track, sort, search, copy and export data, and customize your display.

You can perform the following tasks with dynamic spreadtables:

- [Sorting](#)
- [Finding](#)
- [Copying and Exporting](#)
- [Customizing Layout](#)

Sorting

You can sort two ways:

1. To sort a category, click on the grey dot in its column header.

The arrow that replaces the grey dot indicates a direction of order, for example, ascending or descending alphabetical or chronological order, where applicable.

Re-sort in the opposite direction by clicking the header arrow again.

2. You can right-click on a cell and select **Sort** in the table from the pop-up menu that appears. This action opens a dialog box in which you can select up to three columns for sorting.

Finding

To find specific information in the table, right-click on a cell and select **Find** from the pop-up menu that appears.

Find a matching value by typing the desired sequence of characters into the text field that appears. Indicate whether to match case, and select the direction of the search, backward or forward.

Click **Cancel** to stop a long running search.

Copying and Exporting

To copy a cell, selected rows, or all rows of data to the clipboard, right-click in a cell. From the menu, choose the appropriate option that appears.

When you insert the copied selection into a spreadsheet application, such as Microsoft Excel, the appropriate headers automatically migrate with the selection and appear as its first row. Rows are copied in a tab-delimited format.

Cells that display values as check marks or X display differently when copied and exported: positive values are expressed as asterisks (*) and negative values do not display.

Note: Hidden information does not migrate with exported data.

Customizing the Layout

Adjust the table layout to accommodate your needs:

- You can make changes to the column width, sequence, visibility, and sort order.
- Resize the columns or rows to display text as you wish.
- Depending on the application, you can resize the window also, and the spreadtable display will adjust accordingly.

- Resequence the columns: in a header, click and hold mouse until a black box appears. Move the header to the selected position. Allow for the delay before moving.
- To make irrelevant or confidential information invisible, right-click the header of the column you wish to hide and then select Hide Column on the pop-up menu.
- The Show Column option reveals a submenu that lists currently hidden columns. Select all or only those you wish to display.
- Hidden information does not migrate when data is copied to the clipboard.
- To preserve changes you make to the table layout, right-click a column header. Choose Customizations, and from its submenu, choose Save.
- To restore default settings, right-click a column header. Choose Customizations, and from its submenu, choose Clear.

Glossary

A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Account adjustment

An adjustment to a subledger account, made via journal entries.

Acknowledgment

A token response, indicating that a given request was received.

Acquirer

A financial institution that establishes an account for a merchant and processes credit card payment authorizations and payments.

Action

A user-initiated step taken to resolve an incident.

Activity

Any data change—including customer, administrator, or system events—that the system can log for reporting purposes or to trigger e-mail notifications.

Examples of activities:

- User login
- Customer payment of a bill
- Data upload

Activity logger

The component of the application that records all activities—including customer, administrator, or system events—for use in reporting and e-mail notifications. See [activity](#).

Adapter

Mediation layer provided by Service Delivery Platform to interface with various network elements.

Adapter type

Different kinds of adapter provided by Service Delivery Platform.

Address

A physical location for a customer or a contact.

Adjusted pipeline

The amounts for the latest, committed opportunity-level forecast. The amounts displayed are the amounts committed by the user or by the user's subordinates at the opportunity level.

Advertisement

In iMarketing, an advertisement is a campaign without an offer attached to it.

Advertiser

In iMarketing, an advertiser is an affiliate that displays a merchant campaign (promotion, survey, ad, event) on its site. Advertisers can be subsidiaries, suppliers, channel partners, ad networks, portals, and so on.

Affiliate

In iMarketing, affiliates are third parties (subsidiaries, suppliers, channel partners, ad networks, and so on) that participate in the merchant's campaigns. Two types of affiliates are publishers and advertisers.

Aging

In accounting, the activity associated with the amount of time that a customer claim is unresolved. Claims with comparatively long periods of aging represent funds that are inaccessible or cannot be accurately measured.

Alphanumeric number type

An option for numbering documents, employees, and suppliers where assigned numbers can contain letters as well as numbers.

Alternate unit of measure

All other units of measure defined for an item, excluding the primary unit of measure.

AMPS

Advanced Mobile Phone Service. An analog cellular voice communication system that operates in the 800 MHz range.

ANSI

American National Standards Institute, which establishes national standards for the United States and serves as the North American representative to ISO (International Standards Organization). The parent organization for X12.

AOL

Applications Object Library.

API (Application Programmable Interface)

A set of procedures that import or export information between an application and an operating system or other system program.

Application building block

A set of tables and modules (forms, reports, and concurrent programs) that implement closely-related entities and their processing.

Approve

An action you take to indicate that you consider the contents of a purchasing document to be correct. If the document passes the submission tests and you have sufficient authority, Purchasing approves the document.

Asset category

Assets may be grouped by category. All assets in a category share the same asset cost accounts and depreciation accounts for each depreciation book.

Asset hierarchy

Assets can be grouped and placed in a hierarchy of larger groups. For example, computers can be grouped for each floor of a building. The floor groupings can then be grouped into one logical grouping of computers for the whole building. The hierarchy would consist of all computers in the building at the top as a parent to each floor grouping of computers. Each floor grouping is a parent to the individual computers.

Asset hierarchy batch

Any changes made to a hierarchy are recorded in a batch that, when applied, will make the changes in your financial books.

Asset hierarchy node

A node represents a logical collection of assets. Several logical groupings (nodes) can be placed in a hierarchical structure, with the asset records serving as children of the lowest level logical nodes. Each node can have only one parent but can have many children.

Asset hierarchy purpose

An asset hierarchy purpose provides a justification for building an asset hierarchy that serves some useful accounting purpose. At least one asset hierarchy rule must exist before a purpose can be created. An asset hierarchy purpose is required to build a hierarchy.

Asset hierarchy rule

An asset hierarchy rule determines the values of attributes for nodes in the asset hierarchy.

Asset item

Anything you make, purchase, or sell including components, subassemblies, finished products, or supplies, which carries a cost and is valued in your asset subinventories.

Asset status

A user-defined field. This field may be used to search for an asset in the Find Assets window. This field also affects Mass Additions, Mass Transfers, and Batch Transfers.

Asset subinventory

A subdivision of an organization that represents either a physical area or a logical grouping of items. An example is a storeroom where quantity balances are maintained for all items and values are maintained for asset items.

Attachment

A file of any type that is associated with a value such as a customer site, a to do, or an opportunity. An example is a contract created in a word processing file that is attached to a customer.

Attribute - Oracle Provisioning

A type identifier.

Attribute, profile

A name-value pair that identifies one of the pieces of information the system asks the user to provide about him- or herself for a user profile. Examples of profile attributes: State, FavoriteColor.

There are two types of profile attributes:

- Generic: The attribute is used with all users of that profile type.
- Conditional: The attribute is used with a subset of the users of that profile type that meet a given condition.

Authentication

An electronic security scheme that requires a user to enter a user name and password to view certain files or open certain parts of a user interface.

Authorization

The validation of access rights. Authorization uses authentication and evaluation of constraints to process a request.

Autopay rule

Automatic payment rule. A rule in the database, set up in advance by the customer, that prompts the system to automatically pay the bills sent to that customer by a particular biller.

The customer can specify, for a given biller:

- The amount of payment

- The date on which to pay the bill
- The payment instrument to use

When such a rule is established, the system automatically pays all of that biller's bills without intervention from the customer until the customer changes the rule.

Autopayment

The automatic payment of bills according to autopay rules set up by the customer.

Availability matrix

A table containing information on the availability of software products. It covers the various versions of a product classified by platform, with their respective release dates.

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B

Back end payment system

An application used by a biller site to process payment requests for a specific kind of payment method. For example, one payment system might handle certain kinds of credit card payments, while another payment system handles only financial institution (bank) account transfers.

Example of payment systems: CyberCash, Check Free, Verifone.

See [financial institution payment system](#) and [credit card payment system](#).

Backflush operation

A routing operation where you backflush component items.

Backflush transaction

A material transaction that automatically issues component items into work in process from inventory when you move or complete the assembly. Also known as post-deduct or pull.

Bank account transfer

See [financial institution account transfer](#).

Bill of material

A list of component items associated with a parent item and information about how each item relates to the parent item. Oracle Manufacturing supports standard, model, option class, and planning bills. The item information on a bill depends on the item type and bill type. The most common type of bill is a standard bill of material. A standard bill of material lists the components associated with a product or subassembly. It specifies the required quantity for each component plus other information to control work in process, material planning, and other Oracle Manufacturing functions.

Bill-to address

The customer's billing address. It is also known as **invoice-to address**. It is used as a level of detail when defining a forecast. If a forecast has a bill-to address associated with it, a sales order only consumes that forecast if the bill-to address is the same.

Bill/routing reference

A bill or routing you assign to non-standard discrete jobs. You use the bill reference to create the material requirements for the job. You use the routing reference to create the routing for the job.

BOM

Bill of material

BOM item type

An item classification that determines the items you can use as components in a bill of material. BOM Item types include standard, model, option class, and planning items.

Bonus

Incentive compensation typically paid for meeting a goal, including quantitative and qualitative goals.

Booked date

The date that an order is booked, signifying that the order is firm and includes all the information necessary to be processed through its order cycle.

Browser

See [web browser](#).

Bug

A product defect or failure. Failure may be exhibited as an outage, incorrect or undocumented behavior, inaccurate documentation, or performance degradation.

Bundle sequencing

Sequencing of different bundles in an order. One bundle cannot continue until an earlier bundle completes.

Bundles

Collection of line items of an order.

Business application

Software that performs a particular business function or group of functions (accounts payable, for example).

Business document

A document used for conducting business between two trading partners—a purchase order or invoice, for example.

Business process

Business rules for the type of support, such as field or help desk.

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C**Calculator**

A database that uses the data collected by the collector to calculate a compensation payment.

Campaign

A marketing activity that is displayed on merchant or affiliate web sites. A campaign can be a promotion, an advertisement, a survey, an event, or a publisher's ad.

Capture

Phase in the payment process when funds are transferred from the customer's account to the payee's account for an already authorized transaction.

Certification matrix

A table containing certified information of the availability of software products. It covers a range of platforms and products and their respective versions, and clarifies which combinations do or do not work together.

Channel

A unique route from Service Delivery Platform to the Network Element via a Service Platform Delivery Adapter.

Classification

A classification of the type of business area that an account or opportunity is interested in. This can be anything—such as a type of product, a technology, or a business sector. Classifications are created for you by your system administrator.

Classification rules

A user-defined set of rules used to classify a sales transaction.

Clawback

The amount of compensation credited for a sale that is taken back when the invoice due date grace period is exceeded.

CLEI code

Common Language Equipment Identifier code. A 10-character code identifying telecommunications equipment in a uniform, feature-oriented language.

Client

A software application (such as a browser) that requests services, data, or processing from a server or from another application.

CLLI code (also CLLIA, CLLIZ)

Common Language Location Identifier code. An 11-character code identifying and describing buildings, non-buildings, equipment locations, and related job functions.

Close date

The date by which you expect your prospect to make a purchase decision. Close date determines the period for which an opportunity is forecasted.

Close reason

The reason an opportunity is no longer active. An opportunity closes because it turns into a sale, is lost to a competitor, or is not a viable.

Code

A unique identifying number used anywhere a unique identifier is required, for example, event code, advertisement code, letter code, and so forth. Your system administrator determines if code is user- or system-generated.

Collection

The process of collecting transactions from feeder systems into the application.

Collector

A database that collects the data required to pay compensation.

Column headings

Descriptions of the contents of each column in the report.

Committed amount

The amount you agree to spend with a supplier.

Compensation plan

A collection of plan elements used to calculate a compensation payment. One compensation plan is assigned to a salesperson for a given period of time. See [source document](#) or [source transaction](#).

Compensation rate

A multiplier on net sales credit. Rate is determined by level of quota achievement, as defined in a rate table.

Compensation transaction

The smallest logical unit of data on which a compensation payment can be calculated. Each transaction comprises several *attributes*, some of which can be user-defined during implementation.

Competitor

A company that competes with your enterprise.

Component

A serviceable item that is a part or feature in another serviceable item. Your customers cannot report service requests against this type of serviceable item directly. You can reference components when you enter service requests against actual end item-type serviceable items, or products. For example, if you define three inventory items, A, B, and C, where A and B are products (end item-type serviceable items) but C is a component (non-end item-type serviceable item) of A, you can enter service requests against A and B directly, but not against C. When you enter a service request against product A, you can reference C because it is a component of A.

Component item

An item associated with a parent item on a bill of material.

Computer-telephony integration (CTI)

The practice of using a computer to control one or more telephone and communications functions.

Concurrent manager

Components of your applications concurrent processing facility that monitor and run time-consuming tasks for you without tying up your terminal. Whenever you submit a request, such as running a report, a concurrent manager does the work for you, letting you perform many tasks simultaneously.

Concurrent process

A task in the process of completing. Each time you submit a task, you create a new concurrent process. A concurrent process runs simultaneously with other concurrent processes (and other activities on your computer) to help you complete multiple tasks at once with no interruptions to your terminal.

Concurrent queue

A list of concurrent requests awaiting completion by a concurrent manager. Each concurrent manager has a queue of requests waiting in line. If your system administrator sets up simultaneous queuing, your request can wait to run in more than one queue.

Concurrent request

A request to complete a task for you. You issue a request whenever you submit a task, such as running a report. Once you submit a task, the concurrent manager automatically takes over for you, completing your request without further involvement from you, or interruption to your work. Concurrent managers process your request according to when you submit the request and the priority you assign to your request. If you do not assign a priority to your request, your application prioritizes the request for you.

Configuration

A product a customer orders by choosing a base version and a list of options. It can be provided as individual pieces, as a set, or as an assembly (configuration item).

Configuration bill of material

The bill of material for a configuration item.

Configure-to-order

An environment where you enter customer orders by choosing a base model and then selecting options from a list of choices.

Contact

An individual that works for an account.

Coterminous

Setting the same end date for all ordered or renewed service programs.

Coupon

A consumable promotion. This term is based on the analogous use of coupons you find in stores.

Credit memo

A document generated when an invoice is fully or partially reversed.

Credit

Phase in the payment process when funds are transferred from the payee's account to the customer's account.

Credit card payment system

A type of payment system that handles certain kinds of credit card payments only. These payment systems communicate with payment processors for credit card payments. They do not require any communications with the Automated Clearing House network. CyberCash is an example of a credit card payment system.

See [back end payment system](#).

Credit receiver

A salesperson who has been assigned sales credit.

Credit type

A salesperson can receive monetary or non-monetary credit. The credit types are user-defined. Examples of monetary types are commission and bonus. Examples of non-monetary types are air miles and holidays.

Crediting transaction

A type of transaction that gives or takes away sales credit after sales credit has been allocated for an invoice transaction.

CTI

See [computer-telephony integration](#).

Current date

The present system date.

Custom fields

Also known as flexfields. Custom fields are available on most screens. A flexfield must be set up by the system administrator, include a custom label for the field, and indicate what type of data is allowed in the field. A key flexfield is indexed, and a search may be conducted against it or data may be sorted by the field in a report.

Customer number

A system-generated number that uniquely identifies a customer or prospect.

Customized plan

A compensation plan for which you have changed the defaults for quota or compensation rates, according to the needs of an individual salesperson.

Customer product

An entity that identifies a serviceable item or customer product. The customer product identifies not only the product and the customer, but also the product quantity, the product's serial number (if the product is under serial number control and has been assigned a serial number), the location of the product, the various contacts, such as service administration, support, and bill-to associated with the product. A customer may have several of the same customer products.

Customer site

A specific area or place, such as a building or a floor on a building, at a customer address. A customer address may have one or more related customer sites.

Cycle counting

An inventory accuracy analysis technique where inventory is counted on a cyclic schedule rather than once a year.

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D**Dashboard**

The navigation control panel that is accessible to the user at all times.

Database diagram

A graphic representation of application tables and the relationships among them.

Database view

Provides access to an underlying database table. You do not need to know how the data is stored to use a database view.

Decision maker

A contact having authority to make purchase decisions.

Default plan

A compensation plan that has user-defined default values for plan elements. When you assign a base plan to a salesperson, you can customize values in the plan elements such as the quota, rates, periods, draw amounts, and so forth.

Delayed service order

An order for service against existing customer products. The service order is "delayed" because service is ordered later than the product is ordered.

Dequeuer

Process that processes the items of a queue.

Depot repair

A process used to track items returned by a customer for repair or replacement.

Descriptive flexfield

A field you use to collect information unique to your business. You determine the additional information you need and descriptive flexfield lets you customize your application to your needs without additional programming.

De-support notice

A brief announcement specifying a platform/product/version combination for which regular support will no longer be provided as of a certain date.

DHCP

Dynamic Host Configuration Protocol. A protocol that automatically assigns Internet Protocol (IP) addresses on TCP/IP networks when users log on, thereby reducing configuration time. DHCP centralizes IP address management on central computers that run the DHCP server program.

Dimension

A type of hierarchy.

Direct sales credit

Sales credit directly assigned to a salesperson in a transaction in a feeder system, such as Oracle Order Entry or Oracle Receivables, or a foreign source.

Discount

A reduction of the list price of an item.

Display rule

In iMarketing, a display rule is an object that selects a campaign (from a group of eligible campaigns for the specific customer in the session) at run-time (display time). A display rule can be called from any template, including an iStore template.

Display style

A display style is a template design that specifies how information displays on a web page. For example, you use one display style to display product A on a special sale page, and a different display style to display product A on a page detailing product information.

DMS

Defect Management System.

DNS

Domain Name Server. Server computers connected to the Internet that maintain a database of domain names and their associated IP address numbers.

Domain name

A unique name that identifies an Internet site that points to one specific server.

Do not mail

A check box indicating the exclusion of this account or contact from promotional mailings.

Down stream system

A system that a communication company has to have a link with. It can be a system to provision service, to bill a customer, to register a number for E911, and so forth.

Draw

An advance paid to a salesperson toward future earnings.

Drill down

A term referring to clicking on an item within a screen to open a submenu or another screen.

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E

E-commerce

E-commerce builds on e-business, leveraging the Internet supply chain to shift business from a supply-driven to a demand-driven business model. Internet-based sourcing and requisitioning puts the customer completely in control and facilitates the delivery of products and services. The Internet enables e-commerce to connect and extend the value chain, streamline business processes, lower operational costs, and improve time to market.

e-Commerce is possible through the use of the latest Internet-based applications, which can capture older data in various data storage formats from companies and their suppliers and make it available across current applications.

Electronic payment

Any non paper-based type of payment.

Encryption

The data security practice of scrambling (encrypting) data in such a way that only an intended recipient can decrypt and read the data.

Engineering change order (ECO)

A record of revisions to one or more items usually released by engineering.

Entity

A data object that holds information for an application.

ESN

Electronic Serial Number. A 32 bit binary number that uniquely identifies each wireless phone. For analog systems, the ESN along with the Mobile Identification Number (MIN) comprise the handshake information that identifies each mobile phone. See also [mobile number \(MIN or MSISDN\)](#).

Event alert

An alert that runs when a specific event occurs that you define. For example, you can define an event alert to immediately send a message to the buyer if an item is rejected on inspection.

Expected purchases

Products or services you expect to sell with this opportunity.

Expense subinventory

Subdivision of an organization, representing either a physical area or a logical grouping of items, such as a storeroom where no value exists but the quantities may be tracked.

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F**Feeder system**

An order or billing receivable system that inputs transactions to the database.
Example: Oracle Receivables.

Financial institution (FI) payment system

A type of payment system that handles bank account transfers and certain kinds of credit card payments. These payment systems communicate with Automated Clearing House (ACH) networks, credit card systems, or both. See [back end payment system](#).

Financial institution account transfer

A bank account transfer. The direct transfer of funds, for payment, from a customer's financial institution account to a payee's financial institution account.

finished good

Any item subject to a customer order or forecast. See also [product](#).

Flexfield segment

One part of your key flexfield, separated from the other parts by a symbol you choose (such as -, /, or \). Each segment typically represents a cost center, company, item family, or color code.

Forecast

Based upon a sales quota, a forecast of future sales can be entered either by a sales representative or managers.

FTP

File Transfer Protocol. Internet tool to transfer files through the Internet from one computer to another. FTP is used to download files from another computer, as well as to upload files from your computer to a remote computer.

Fulfillment actions

Re-usable functions used to perform pre-defined provisioning tasks. Used as part of the fulfillment of a work item.

Fulfillment element

A unique identifiable physical Network Element/Operational Support System belonging to a fulfillment element type.

Fulfillment procedure

Provisioning Procedure for the fulfillment of service at the fulfillment element.

Fuzzy find

A feature you use to search for a name, address or account for which you are not sure of the exact spelling or wording. Fuzzy find follows a prescribed set of rules to accomplish its search.

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G

Giveback

The payment received for a clawback.

GSM

Global System for Mobile. A digital mobile telecommunications system currently most prolific in Europe and well established in most countries outside the U.S.

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H

Hierarchy

A group of related entities arranged in an inverted tree structure according to rank or successive grades.

Holiday support

An application component that controls the way weekends and holidays affect a payment system's lead time—the time it takes the payment system to process a payment request. Holiday support applies rules to FI payment systems.

Lead time is computed in business days and does not count weekends and holidays. If a payment system's normal lead time is two days, and the payment system receives a request on Friday, the payment may not be processed until Tuesday. Similarly, if July 4 is a bank holiday and the payment system receives the request on July 3, the payment may not be processed until July 6.

Payment systems may have their own customized set of holidays. The payment system may provide a PL/SQL file to use for holiday computation.

HTML

Hypertext Markup Language. A standard format for encoding documents for use on the World Wide Web.

HTML documents may contain text, graphics, references to programs, and references (links) to other hypertext (web) documents.

HTTP

Hypertext Transfer Protocol. The protocol that clients use to issue requests for documents over the Internet.

When HTTP appears at the beginning of a URL, it tells the browser to expect a hypertext document.

HTTPS

A secure version of Hypertext Transfer Protocol (HTTP). HTTPS coexists with HTTP and provides security mechanisms to secure transactions between Web clients and servers.

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I

ICX

The Inter Cartridge Exchange is an API provided by Oracle Web Server to issue HTTP requests between cartridges.

IMAP

Internet Mail Access Protocol. An Internet protocol that expands on the features of POP, an Internet mail server protocol that provides an incoming message storage system. Like POP, IMAP works in conjunction with SMTP, which moves mail from one system to another. See also [SMTP](#).

IMEI

International Mobile Station Equipment Identity is a unique electronic serial number identifying a particular mobile station.

IMSI

International Mobile Subscriber Identity. A unique number identifying a particular subscriber.

incentive factors

See [quota uplift](#) and [period](#).

incentive type

Three types of incentive compose the monetary amount of a compensation payment: commission, bonus, and manual payments.

incident

An entry logged in to record a customer's request for product service. You can log a different incident for each issue a customer reports, including questions about products, problems using the products, requests for preventive maintenance, and requests for service contract renewals.

included item

A standard mandatory component in a bill, indicating that it ships (if shippable) whenever its parent item is shipped. Included items are components of models, kits, and option classes.

indirect sales credit

Credit inherited by a salesperson according to his/her place in the salesperson hierarchy. Indirect credit can roll *up* from a subordinate to a manager, or *across* from a salesperson to a peer.

inspection

A procedure you perform to ensure that items received conform to your quality standards. You can use inspections to prevent payment for goods and services that fail to meet your quality standards.

interest

See [interest type](#).

interest code

A code created by your system administrator for an item or business area that you use to track account, contact, and opportunity interests. Each primary code can have secondary codes, so that you can break your account and contact interests down. For example, you might have one product that is available in more than one version or model. You can create a primary interest code for the product itself and then link it to a number of secondary codes that represent the different versions or models.

interest type

A classification of the type of business area in which a contact is interested. This can be anything—such as a type of product, a technology, or a business sector. Interest types are created for you by your system administrator.

internal requisition

See [internal sales order](#), [purchase requisition](#).

internal sales order

A request within your company for goods or services. An internal sales order originates from an employee or from another process as a requisition, such as inventory or manufacturing, and becomes an internal sales order when the information is transferred from purchasing to order entry. Also known as an internal requisition or a [purchase requisition](#).

inventory transaction

A record of material movement. The basic information for a transaction includes the item number, the quantity moved, the transaction amount, the accounting flexfields, and the date. See [material transaction](#).

issuer

A financial institution that establishes an account for a consumer and issues the payment instrument.

issue transaction

A material transaction to issue component items from inventory to work in process.

item

Anything you make, purchase, or sell, including components, subassemblies, finished products, or supplies.

item attribute control level

To maintain item attributes at the item master attribute level or the organization specific level by defining item attribute control consistent with your company policies. For example, if your company determines serial number control at headquarters regardless of where items are used, you define and maintain serial number attribute control at the item master level. If each organization maintains serial number control locally, they maintain those attributes at the organization specific level.

item master level attribute

An item attribute you control at the item master level as opposed to controlling at the organization level.

item sequence

The sequence of the component item on the bill of material used to sort components on reports.

item specification

See [specification](#).

Item status

Code used to control the transaction activity of an item.

Item type

Entity in Oracle Workflow that identifies a set of business processes.

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J**Java**

An object-oriented, portable computer language developed by Sun Microsystems and supported by the Oracle Application Server.

The Oracle Application Server can execute Java directly and send Java programs to a client's browser for execution there.

JBC

JavaBeans cartridge.

K**Key indicators**

A report that lists statistical receivables and collections information that lets you review trends and projections. Also, an Oracle Applications feature you use to gather and retain information about your productivity, such as the number of invoices paid. You define key indicators periods, and the application provides a report that shows productivity indicators for your current and prior period activity.

Key site

A site you work with frequently.

Knowledge area

A collection of knowledge objects that pertain to a specific product or other categorization.

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L

Latest commitment

The latest amounts committed by the user or by the user's subordinates at the product category level for Forecast and Upside statuses. 'None' is displayed if no previous commitment was made.

LDAP

Lightweight Directory Access Protocol. A directory service specification that provides *white pages* services for an organization, for example, helping people locate other people or services. A directory service is a database that users can search and manipulate in a number of ways to display information about a network and its resources, or to create and manage user accounts. In Oracle Applications, LDAP refers to the server used for such purposes.

Lead

A potential to sell products and/or services to an account or contact. Leads record the initial interest a customer or prospect has in making a purchase or in evaluating a product for purchase. One contact can generate many leads. One marketing activity can generate many leads. Qualified leads become opportunities.

Life end date (LED)

The date when an asset will be fully depreciated. For example, if an asset with a life of three years is entered into an accounting book on 1 January 2003, then its LED will be 31 December 2005.

Line item

Individual products/services part of an order.

Line item sequencing

Line items that do not depend on the start/completion of any other line item (if any) in an order.

List price

A standard item cost charged to a customer for your product.

Local database

A database that runs on the same machine as the Oracle Application Server.

Locator

Physical area within a subinventory where you store material, such as a row, aisle, bin, or shelf.

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M**Mail merge**

A feature of word processing software that lets you personalize a form letter. In general, two files are involved: a *form letter* containing both the text that remains the same and tokens representing information to be personalized and a *merge file* containing database information that replaces the tokens, such as a company name or a contact's name and address.

Mandatory component

A component in a bill that is not optional. Oracle Applications distinguish mandatory from optional components in model and option class bills of material. Mandatory components in pick-to-order model bills are often referred to as included items, especially if they are shippable.

Manual transaction

A user-entered transaction created for reversing or changing sales credit.

Mapping

Rules defining collection that map the table columns of a feeder system to the transaction columns in the application.

Mass change order

A record of a plan to replace, delete, or update one or more component items in many bills of material at the same time.

Mass retirement

A feature that allows you to retire a group of assets at one time. In Oracle Assets, mass retirements may be made through the Asset Hierarchy or through the Mass Transactions menus.

Material transaction

Transfer between, issue from, receipt to, or adjustment to an inventory organization, subinventory, or locator. Receipt of completed assemblies into inventory from a job or repetitive schedule. Issue of component items from inventory to work in process.

Merge file

An operating system file that contains information pulled from the database, for merging into the text of a form letter to personalize it. For example, a merge file might contain name and address information for 15 contacts. When merged into the text of a form letter, it produces 15 personalized letters.

Message set

See [OFX message set](#).

Middle ware

Software that sits between two or more types of software and translates information between them.

Mobile number (MIN or MSISDN)

Mobile Identification Number. The North American standard consists of 10 digits and follows this sequence: “(###) ###-####”. The European standard consists of 6 digits and follows this sequence: “## #####”. For analog systems, the MIN and the Electronic Serial Number (ESN) comprise the handshake information that identifies each mobile phone. See also [ESN](#).

Model bill of material

A bill of material for a model item. A model bill lists option classes and options available when you place an order for the model item.

Model item

An item whose bill of material lists options and option classes available when you place an order for the model item.

Module

A program or procedure that implements one or more business functions, or parts of a business function in an application. Modules include forms, concurrent programs, and subroutines.

Multimedia

Multimedia consist of files used to present content on a web page to your customer, such as graphics, text, audio, and video.

Multimedia component

Multimedia components define the types of media objects available to display on a web page, such as a certain size picture, short text description, or audio of a certain length.

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N

Name-value pair

Used in HTTP communications to pass data. Name-value pairs may be either *input* or *output*.

Net sales credit

The product of the transaction factor and sales credit, given if a salesperson is eligible. Net sales credit is further multiplied by the compensation uplift to determine compensation credit.

NLS

National language support.

NNTP

Network News Transfer Protocol. The delivery mechanism for the USENET newsgroup service. It provides a way to exchange messages, articles, and bulletins throughout the Internet.

Non-standard discrete job

A type of discrete job that controls material and resources and collects costs for a wide variety of miscellaneous manufacturing activities. These activities can include rework, field service repair, upgrade, disassembly, maintenance, engineering prototypes, and other projects. Non-standard jobs do not earn material overhead upon assembly completion.

Non-standard expense job

A type of non-standard job expensed at the close of each accounting period. Typical expense jobs include maintenance and repair.

Note

A piece of information about a site, opportunity, or contact. A note is either entered by you or generated automatically to record the occurrence of a specific situation such as the receipt of a telephone call from a contact.

Notification

An e-mail message that the system creates and sends automatically to users or other addressees when certain events occur in the system.

Numeric number type

An option for numbering documents, employees, and suppliers where assigned numbers contain only numbers.

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0**Offer rules**

Rules used to specify if a promotion applies to a customer during order checkout in a given web site session.

Offline payment processing

The payment processing model in which a payment processing request is not immediately forwarded to back-end payment processors.

OFX

Open Financial Exchange. A framework developed by CheckFree, Intuit, and Microsoft for exchanging financial data and instructions between customers and their financial institutions.

OFX enables institutions to connect directly to their customers or other institutions without requiring an intermediary.

OFX is an open specification that anyone can implement: any financial institution, transaction processor, software developer, or other party. It uses widely accepted

open standards for data formatting (such as SGML), connectivity (such as TCP/IP and HTTP), and security (such as SSL).

OFX message

The unit of work in OFX, consisting of a request and response pair and the status codes associated with that response.

OFX message set

A collection of OFX messages. OFX message sets are the basis for OFX version control, routing, and security. They are also the basis for the required ordering in OFX files.

On hold job/schedule

A job or repetitive schedule that is not accepting further activity and is therefore untransactable.

Online payment processing

The payment processing model in which a payment processing request is immediately forwarded to the back-end payment processor.

Open interface

A manufacturing function that lets you import or export data from other systems through an open interface. An example is a bar code reader device accumulating data you later import into your manufacturing system for further processing.

Open requirement

A Work In Process (WIP) material requirement you have not yet transacted to a discrete job or repetitive schedule. It equates to the component quantity required less any quantity issued.

Opportunity

A qualified sales lead with the potential to bring in revenue. An opportunity has a life span and it eventually closes either because it turns into a sale, is lost to a competitor, or is a bad opportunity. An opportunity is assigned to one or more territories based on a variety of criteria and may be worked on by a single sales representative, by a team of employees, or by a sales partner.

Opportunity item

A line item associated with an opportunity.

Opportunity number

The unique identifying number for an opportunity.

Option

An optional item component in an option class or model bill of material.

Option class bill of material

A bill of material for an option class item that contains a list of related options.

Option class item

An item whose bill of material contains a list of related options.

Option dependent operation

An operation in a model or option class item's routing that appears in a configuration item routing only if the configuration contains an option that references that operation.

Order analyser

PL/SQL (Service Delivery Platform) procedure used to add/delete/modify contents of orders.

Order date

The date an order for goods or services is entered. See also [work order date](#).

Order line number

A number that uniquely identifies a specific line of a sales order.

Order number

A number that uniquely identifies a sales order.

Order type

A classification of a sales order.

Organization

An entity that can conduct business with your company. An organization can consist of multiple sites and may have multiple contacts associated with it.

Organization-specific level attribute

An item attribute you control at the organization level.

Original pipeline

Consists of the actual Opportunity amounts, totaled by Won, Forecast, and Upside statuses.

Outside processing

Performing work on a discrete job or repetitive schedule using resources provided by a supplier.

Outsource service

A company that provides billers with external web-based bill presentment and payment. The outsource service acts as a host for one or more billers' websites.

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P**Packages**

Pre-defined collection of products.

Parent node

An asset hierarchy is built using parent/child relationships. A parent node is a logical collection of assets or logical grouping of other hierarchy nodes. An asset record cannot be a parent node. A parent node can have only asset records as children or only hierarchy nodes as children. It cannot have both.

Parameter form

The HTML form that defines the parameters required for a report. For example, if the report you are creating is a list of all customers for a particular biller, the user must be able to enter the name of the desired biller when running the report.

Partition

A feature of the Oracle 8 database that provides a way to support very large tables by allowing you to decompose them into smaller and more manageable pieces. These pieces are called partitions.

After you define your partitions, you can access and manipulate them instead of manipulating the entire table.

All the partitions of a table have the same logical attributes.

Partner

A company acting on behalf of your enterprise that helps close business for you by selling your products.

Pay group

A group of pay periods. It is used to identify the payment cycles of a salesperson. Each pay group may have one or many pay periods.

Pay period

A range of dates over which calculated plan element commissions are collected for payment.

Payee

The company or other entity, such as a biller, that is being paid in a given transaction.

Payee account

The account (typically, a bank account) where the proceeds of all payments to a given payee are transferred.

Payment instrument

A bank account or credit card account that a customer uses for paying bills.

Payment method

A form of payment that a biller accepts for the payment of its bills.

For example, the payment method that National Utility accepts might be credit cards and financial institution account transfers, while Big Bank Credit Card Company might accept only financial institution account transfers.

Payment processing

The process of submitting, authorizing, and returning a payment request and related data.

Payment state, payment status

The status of a payment in iPayment. The five possible payment states are Pending, Scheduled, Paid, Failed, and Canceled.

A payment is Scheduled when any of the following conditions apply:

- The customer has scheduled it
- The system has determined that the payment will be paid by autopayment
- The payment was Failed and a CSR has rescheduled it for payment

A payment is Pending when the customer has scheduled it, but the scheduling system has not sent it to the payment system.

A payment is Paid when it has been completed successfully.

It is Failed when it cannot be paid for any reason, such as insufficient customer funds.

A payment is Canceled when a CSR has canceled it following a customer dispute or when he or she has determined for whatever reason that the payment cannot be rescheduled. Note that a scheduled payment can be canceled as long as the cancellation occurs before it reaches a bank.

Payment system

An application used by a biller site to process payment requests for a specific kind of payment method. For example, one payment system might handle certain kinds of credit card payments, while another payment system handles only financial institution (bank) account transfers.

Example of payment systems: CyberCash, Check Free, Verifone.

See [financial institution payment system](#) and [credit card payment system](#).

Payment uplift

A type of incentive, the payment uplift is a multiplier on the compensation rate. The payment uplift varies the compensation payment without affecting quota achievement.

The account (typically, a bank account) where the proceeds of all payments to a given payee are transferred.

Pending

A status where a process or transaction is waiting to be completed.

Pending-iPayment

A payment status in which the customer has scheduled the payment but the scheduling system has not yet sent it to the payment system. See [role](#).

Period

A unit of time, such as one week, two weeks, or a month, on which your accounting calendar is based.

Period target

The target quota amount for a plan element for each period in the compensation plan.

Pipeline

An accumulation of the forecasted opportunity purchase lines that contain a status of Upside or Forecast.

Plan element

Terms defining the conditions a salesperson must meet to be paid compensation and the amount of compensation to be paid. A plan element includes one or more revenue classes, quota, transaction factor, incentives and compensation rate.

Point code

A unique code that identifies a network node so that the SS7 network can route calls properly.

Point of presence (POP)

A location where dial-up phone lines or leased line connections exist for Internet connection to an Internet service provider. Do not confuse with [POP](#) (Post Office Protocol).

POP

Post Office Protocol. Do not confuse with [point of presence \(POP\)](#). An Internet mail server protocol that provides an incoming message storage system. POP works in conjunction with SMTP, which moves mail from one system to another. See also [SMTP](#).

Posting

In iMarketing, posting is a campaign that is displayed by publishers or is displayed on advertiser sites (could be driven by a display rule). Posting is usually associated with terms of contract such as the display program, billing rate, effectivity dates, and so on.

PPP

Point-to-Point Protocol. A scheme to encapsulate and transmit Internet Protocol (IP) datagrams over serial point-to-point links. PPP provides router-to-router, host-to-router, and host-to-host connections.

Primary code

See [interest code](#).

Primary routing

A list of the operations you most frequently perform to build a product. The primary routing is the default routing for defining a job and calculating manufacturing lead times.

Privilege

The right or ability to perform an operation in the system.

See [role](#).

Proactive knowledge

Information that is created based on analysis of customer need with the primary purpose of minimizing service requests. Typically, this information can be technical bulletins, white papers, FAQs, alerts, availability matrices, step-by-step instructions, and so forth.

Process

A set of Oracle Workflow activities that need to be performed to accomplish a business goal. See [process activity](#), [process definition](#).

Process activity

An Oracle Workflow process modelled as an activity so that it can be referenced by other processes; also known as a subprocess. See also [process](#).

Process definition

An Oracle Workflow process as defined in the Oracle Workflow Builder. See also [process](#).

Product

A finished item that you sell. See also [finished good](#).

Product catalog

Summarized product information can be searched for and viewed in the product catalog along with any additional files relating to the product.

Product category

A product category is a concatenation of interest type, primary interest code, and secondary interest code, or it is an inventory item description.

Profile option

A set of changeable options that affect the way your applications run. In general, profile options can be set at one or more of the following levels: site, application, responsibility, and user.

Promotion

In iMarketing, a promotion is a specific type of campaign with a discount value. It impacts the price of the item bought, the shipping charge, and the order amount during the checkout process. A promotion is associated with modifiers such as 2% off on the order.

Prospect

A company or other entity that has not yet placed a purchase order with your enterprise.

Protection level

In Oracle Workflow, a numeric value ranging from 0 to 1000 that represents who the data is protected from for modification. When workflow data is defined, it can either be set to customizable (1000), meaning anyone can modify it, or it can be

assigned a protection level that is equal to the access level of the user defining the data. In the latter case, only users operating at an access level equal to or lower than the data's protection level can modify the data.

Proxy server

Proxy server services run on a firewall server at the application level to protect internal resources on networks from other networks, such as the Internet. Proxy server services include controls for Web services and file transfer services.

Publisher

In iMarketing, a publisher is an affiliate that displays its ad on the merchant site. Publishers can be subsidiaries, suppliers and channel partners, ad networks, portals, and so on.

Purchase order (PO)

A document used to buy and request delivery of goods or services from a vendor.

Purchase requisition

An internal request for goods or services. A requisition can originate from an employee or from another process, such as inventory or manufacturing. Each requisition can include many lines, generally with a distinct item on each requisition line. Each requisition line includes at least a description of the item, the unit of measure, the quantity needed, the price per item, and the Accounting Flexfield you are charging for the item.

Purchased assembly

An assembly that you normally buy.

Purchased item

An item that you buy and receive. If an item is also an inventory item, you may also be able to stock it.

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Q

Quantity

The number of items ordered on a sales order line.

Qualified lead

A lead becomes qualified when it appears likely to lead to a sale. Leads can be set to "qualified" by a sales representative, or automatically, if the information in a lead meets criteria preset by the application administrator. For example, a lead can become qualified automatically as soon as a telemarketer makes entries in the Time Frame, Budget and Budget Status fields.

Queue

An intraoperation step in an operation where assemblies are waiting to be worked on, or service requests are waiting for response. The default intraoperation step for every operation in a routing.

Quota

A revenue goal for a sales representative that affects compensation.

Quota achievement

Accumulated performance against a quota that determines the compensation rate.

Quota credit

The product of the net sales credit and quota uplift. Quota credit is added to a salesperson's quota achievement.

Quota percent

For an expected purchase, the percentage of the amount that you can claim as credit toward your quota. If you enter a value here, the system automatically calculates the Quota Credit.

Quota type

You can choose to view forecasts of actual revenue amounts or non-revenue amounts used for quota credits. Non-revenue amounts are created only for the purposes of sales representative remuneration.

Quota uplift

A type of incentive, the quota uplift is a multiplier on net sales credit, resulting in higher or lower quota credit applied toward the quota.

Quote

A quote is a list of items and prices presented to a prospect. It is created by a sales representative when a contact, agreement, price list, and ship to site have been specified.

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R**Rate bracket**

A range of achievement associated with a compensation rate. Also called a rate tier.

Rate table

A structure that associates compensation rates with brackets.

Reactive knowledge

Information created in real time mode based on information contained within a service request. Typically in the form of a product/solution.

Reconciliation

The process by which a payee and its bank exchange transaction report and match their records.

Reference

A check box that indicates whether a customer, site, or contact is trusted enough to act as a reference to other prospects.

Remaining useful life (RUL)

The remaining accounting periods for which an asset may be depreciated. For example, if an asset is entered into your system with a useful life of five years, then in its third year of service, that asset will have an RUL of two years.

Renewal order

An order containing service order lines to renew or extend existing services applied to products.

Requisition

See [purchase requisition](#) and [internal sales order](#).

Return

The process of transfer of funds from the payee's account to the customer's account in which the orderID is available.

Return material authorization (RMA)

Permission for a customer to return items. Receivables allows you to authorize the return of your sales orders as well as sales made by other dealers or suppliers, as long as the items are part of your item master and price list.

Revenue amount

For an expected purchase, each item, the amount you can roll upwards on a revenue forecast.

Revenue class

A user-defined category of business revenue. Revenue classes are assigned to plan elements and help determine if sales credit is applied toward a compensation payment.

Revenue class hierarchy

A hierarchical arrangement of revenue classes and their subclasses in which you define very broad classes at the top of the structure. A revenue class hierarchy makes it possible to pay compensation for a broad revenue class without specifying all its subclasses.

Revenue classification rules

A set of one or more conditions a revenue class must have to classify into a given revenue class.

Revenue percent

For an expected purchase, the percentage of the amount that you can roll upwards on a revenue forecast. If you enter a value here, the system automatically calculates the Revenue Amount.

Revised component

Component changes to an assembly that is a revised item on an ECO.

Revised item

Any item you change on an engineering change order. Revised items may be purchased items, subassemblies, finished goods.

Revised item status

A classification you can use to track and control a revised item's life cycle. Revised item statuses include Open, Released, Scheduled, Hold, Implemented, and Cancelled.

Revision

A particular version of an item, bill of material, or routing.

Revision control

An inventory control option that tracks inventory by item revision and forces you to specify a revision for each material transaction.

Revision quantity control

A condition placed on an item that ensures that you always identify an item by its number and its revision. Certain items require tighter controls than other. For instance, you may want to control the quantities you have in inventory for an item by revision. For another item, you may just want to know the quantities you have on hand across all revisions. You keep track of inventory quantities by revision when an item is under revision quantity control. You keep track of inventory quantities by item when an item is not under revision quantity control.

Risk factor

Information that an electronic commerce application finds fit to use to evaluate risk of the customer.

Risk factor score

A number from 0-100 that assigns a risk value for a risk factor.

Risk formula

A formula that is based on multiple risk factors and used by a merchant to evaluate the risk of the customer.

Risk Management (iPayment)

A new functionality provided by iPayment for electronic commerce applications both for business-to-business and for business-to-consumer models. iPayment includes a number of built-in risk factors and provides the option to the payees to run or not run the risk evaluation for each payment operation.

Risky Instruments Upload Utility (iPayment)

A Java application used to store risky payment instruments.

Role

A group of related privileges.

See [privilege](#).

Roll across

In a hierarchy, nodes at the same level in the hierarchy branches. For example, in a salesperson hierarchy, credit rolls across to one or more of a salesperson's peers who are at the same level in the organization.

Rollup

In a hierarchy, all ancestors of a node. For example, sales credit rolls up the salesperson hierarchy from the direct credit receiver to all salespeople above him in the credit chain.

Rollup territory

A territory without rank or group that represents a region. Your rollup territories can be customer-based, geographically-based, product-based or any combination of these and other factors. Each rollup territory is of a particular territory type and is defined by a set of territory values.

Route sheet

A report that provides full routing, operation, resource, and material requirement details for jobs and repetitive schedules. Typically used to know how, when, where, and who builds an assembly. Also known as traveler.

Routing

A sequence of manufacturing operations that you perform to manufacture an assembly. A routing consists of an item, a series of operations, an operation sequence, and operation effective dates.

Routing revision

A specific version of a routing that specifies the operations that are active for a date range.

Run

An intraoperation step where you move assemblies that you are working on at an operation.

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S**Safety stock**

Quantity of stock planned to have in reserve in inventory to protect against fluctuations in demand or supply.

Sales channel

A method used to generate a sales order, such as telemarketing, direct marketing or sales partner. Sales Channels are set up by the administrator using QuickCodes.

Sales credit

An amount of revenue or non-revenue credit awarded to a salesperson. See also [indirect sales credit](#).

Sales credit adjustment

A change in the amount of sales credit assigned to a salesperson by an order or billing system. The change may be retroactive. See also [account adjustment](#).

Sales group

A sales organization within your enterprise that has a manager.

Sales partner

A company acting on behalf of your enterprise helping close business for you by selling your products. Examples of sales partners are reseller or dealer.

Sales rep

A sales representative or salesperson.

Sales rep territory

A sales area that you assign to an employee or team. Your sales rep territories can be customer-based, geographically-based, product-based or any combination of these and other factors. You can also base a sales rep territory on any number of rollup territories such that the sales rep territory automatically inherits the qualifier values of the rollup territories. Each sales rep territory is of a particular territory type within a particular territory group, and has a rank.

Sales stage

A defined step in the sales cycle. Your implementation team defines permissible values based on the sales methodology employed by your sales organization.

Sales status

A defined step in the sales cycle. Your enterprise's implementation team defines permissible values based on the sales methodology employed by your sales organization.

Sales team

A sales team is a group of sales representatives and partners associated with a particular site or opportunity. Members of sales teams can be assigned automatically by the territory assignment program and may belong to different sales groups and reporting hierarchies. Each sales team has at least one sales team leader.

Salesperson

Any entity receiving sales-related incentive compensation including direct salespeople, managers, external agents, distributors, VARs, and customers.

Salesperson hierarchy

A hierarchical arrangement of salespeople in an organization that specifies the relationships between managers and their subordinates.

Scrap

An intraoperation step where you move assemblies that cannot be reworked or completed.

Scrap account

An account that you may use to charge scrap transactions.

Scheduler

The application component that schedules payment requests to back end payment systems and updates the system at regular intervals.

On a regular basis, the scheduler schedules payments and sends and receives payment status updates.

Schema

A collection of database objects associated with a single user or logon account, such as the roles, privileges, views, data files, tables, and tablespaces associated with that account.

Secondary code

See [interest code](#).

Section

You can group products for sale into sections and arrange the sections into a hierarchy. The hierarchy is used to move your customer through your webstore.

Selling price

List price less any discounts.

Serial number

A number assigned to each unit of an item and used to track the item.

Serial number control

A manufacturing technique for enforcing use of serial numbers during a material transaction.

Serialized unit

The unique combination of a serial number and an inventory item.

Service

A benefit or privilege that can be applied to a product. In Oracle Applications, if the items you define are categorized as serviceable items, then you can order or apply service to those serviceable items.

Products offered by carriers.

Service contract

A support license.

Service contract detail

Lines that specify start dates, end dates, product and coverage types.

Service designator

A number or string of characters that uniquely identifies a product or service that a communications service provider has sold to a customer. For example, a phone number or an e-mail address may serve as a service designator.

Service item

An inventory item used to define a service program or warranty. Service items can be recorded against serviceable products. A synonym for serviceable item is a serviceable product.

Service item feature

A particular service component, such as implementation or telephone support, that you include with a service item. When you classify an inventory item as a service type item and enter the service program-related attributes for it, you can list the specific services your service item includes.

Service material

Material used for the repair and/or maintenance of an assembled product.

Service order

An order containing service order lines. Service may be for new products or for existing, previously ordered products.

Service program

A billable service item. Usually a service that customers purchase in addition to a product's base warranty.

Service person

An employee whose function is to provide support and service to customers. Service person is also a synonym for service specialist.

Serviceable item

An inventory item that your organization supports and services, either directly or through the supplier of the item, regardless of who actually manufactures the item. A serviceable item can be an end item, both an end item and a component or part in other end items, or just a component.

Serviceable item class

A category that groups serviceable items. Each class must be of the type Serialized or Non-Serialized. You can group serialized serviceable items in a serialized serviceable item class. You can group non-serialized serviceable items in a non-serialized serviceable item class. A given item may be the member of only one item class at any given time.

Serviced customer product

An entity that identifies a service your customer has recorded against a particular product installation. If you order service against a product, then the application automatically links the product and the service being recorded against the product by creating a serviced customer product. A customer product installation may have more than one serviced product.

Serviced installation

A synonym for [serviced customer product](#).

Servlet

A Java program that runs as part of a network service, typically an HTTP server. It responds to requests from clients. A servlet is commonly used to extend a web server by generating web content dynamically.

SET

The Secure Electronic Transaction protocol. An open standard developed jointly by Visa and MasterCard to ensure the privacy and security of credit card transactions over open networks such as the Internet.

Settlement

A process including capture, voids, returns, and credits.

SLA

Service level agreement

SR

Service request

Set of books

A financial reporting entity that partitions general ledger information and uses a particular chart of accounts, functional currency, and accounting calendar. This concept is the same whether or not the Multi-organization support feature is implemented.

Ship to

The address of the customer who is to receive products listed on the invoice or order.

Ship-to address

A location where items are to be shipped.

SIM

Subscriber Identification Module. GSM (the European Global System for Mobile system) employs signal encryption via the SIM, a programmable smart card that slips into a slot built into the mobile phone handset. The SIM card also provides personal mobility. It contains identification information so all subscribed to services, regardless of the subscriber's location, are available by inserting the SIM card into any accessible GSM mobile phone. See also [GSM](#).

Site

A specific location (address) for a customer or prospect. There can be many sites associated with one customer or prospect.

Sites

A Web site, such as a consolidator site or biller site.

Site code

A system-generated number that uniquely identifies a site.

SMTP

Simple Mail Transfer Protocol. The Internet mail exchange protocol responsible for moving messages from one e-mail server to another. E-mail servers run a message-handling protocol called POP (Post Office Protocol) or IMAP4 (Internet

Mail Access Protocol, version 4). SMTP is like the mail carrier, responsible for transporting mail, while POP and IMAP4 are like the post office, responsible for receiving, storing, and forwarding mail. See also entries for [POP](#) and [IMAP](#).

Source document or source transaction

Transactions collected from a feeder system. Examples include orders, invoices, and credit memos. See also [compensation plan](#).

Source line

Source information tracking where an asset came from. This includes information from capital asset and accounts payable systems, as well as information added manually.

Spare part

A synonym for service part. It is an inventory item used without modification to replace an original part during the performance of maintenance or repair to a serviceable item or product.

Specification

Describes the requirements of a product in Oracle Quality. You can define specifications for the key characteristics of the products you produce.

SSL

Secure Sockets Layer. A standard for encrypting data that flows between a browser and a server, commonly used by payment systems for secure transactions.

Standard bill of material

A bill of material for a standard item, such as a manufactured product or assembly.

Standard costing

A costing method where a predetermined standard cost is used for charging material, resource, overhead, period close, job close, and cost update transactions and valuing inventory. Any deviation in actual costs from the predetermined standard is recorded as a variance.

Standard discrete job

A type of discrete job that controls material and resources for standard production assemblies.

Standard item

Any item that can have a bill or be a component on a bill except planning items, option classes, or models. Standard items include purchased items, subassemblies, and finished products.

Standard operation

A commonly used operation you can define as a template for use in defining future routing operations.

Standard unit cost

The unit cost you may use to cost all material and resource transactions in your inventory and work in process system. This cost represents the expected cost for a component or assembly for a specified interval of time. The basis for standard cost may be the cost history, purchase order history, or predicted changes in future costs.

Standard warranty

A standard coverage type bundled with all sales of a particular product.

Start date

The date you plan to begin production of assemblies in a discrete job.

Status

See [payment status](#).

Subassembly

An assembly used as a component in a higher level assembly.

Subinventory

Subdivision of an organization, representing either a physical area or a logical grouping of items, such as a storeroom or receiving dock.

Supply type

A bill of material component field that controls issue transactions from inventory to work in process. Supply types supported by Work in Process include: Push, Assembly pull, Operation pull, Bulk, Supplier, Phantom, and Based on bill.

Support site

A support territory (as opposed to a sales territory).

Supported product

An Oracle product and version combination for which technical assistance and error correction is provided.

System

A grouping of customer products.

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T**Tablespace**

An area of a database where a defined group of tables is stored.

Target segment

Defines a group of related customers. A segment may be associated with a set of campaigns. iMarketing checks the segments a customer belongs to, and determines the campaigns eligible for the customer. A segment can be organized hierarchically and can have up to one parent segment. The set of customers in a segment is always a subset of the customers in its parent segment.

Target segment rule

In iMarketing, a conditional statement associated with a target segment.

Target

A revenue goal associated with a single revenue class. Targets do not affect the compensation payment.

Target quota

A revenue goal for a salesperson associated with a plan element. Target quotas do not affect the compensation payment.

Template

Specifications written in HTML that control the appearance and characteristics of an HTML document, such as a web page.

Territory

An artificial aggregation of accounts, contacts, or leads.

Territory group

A territory group is a set of territory types that compete with each other when assigning leads and accounts to employees by territory. For a particular lead or account, access is granted to the employees whose territories rank highest within each territory group.

To move

An intraoperation step where assemblies can either be completed to a subinventory or wait to be moved to another operation.

Total product value

The total product list value less the total product discount value.

Total order value

The total product value plus the total service value.

Total commitment value

The dollar value of a contractual guarantee, with a customer, for future purchases.

Transaction attribute

A single piece of information required to calculate compensation earnings. For example, a salesperson's name or an employee ID.

Transaction date

The date you enter and Oracle Manufacturing maintains for any manufacturing transaction. The date must fall within an open accounting period and be greater than the release date for transactions on a discrete job or repetitive schedule.

Transaction factor

A multiplier on sales credit that determines net sales credit given for each type of transaction.

Transaction manager

A concurrent program that controls your manufacturing transactions.

Transaction worker

An independent concurrent process launched by a transaction manager to validate and process your manufacturing transactions.

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U**Unit of measure (UOM)**

The unit in which the quantity of an item is expressed.

Unit of measure class

A group of units of measure and their corresponding base unit of measure. The standard unit classes are Length, Weight, Volume, Area, Time, and Pack.

Unit of measure conversions

Numerical factors that enable you to perform transactions in units other than the primary unit of the item being transacted.

UOM

See [unit of measure \(UOM\)](#).

URL

The Universal Resource Locator. The address for any file of text, graphic, sound, or video information displayed on the World Wide Web.

User currency

The currency which the user has defined as the preferred currency.

V**Void**

Removing a particular transaction from the records.

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W

Warranty

A non-billable, zero-monetary service item attached directly to a product at shipment.

Web browser

Software that enables a user to view information (browse) on the World Wide Web using HTTP.

Web server

A server connected to the Internet that stores documents and files and can display them to people accessing the server.

Win probability

The likelihood that the opportunity can close as a win by the expected close date. Your implementation team determines permissible values. Win probability can be linked to status so that status automatically updates when win probability changes.

Work in Process (WIP) accounting class

A set of accounts that you use to charge the production of an assembly. You assign accounting classes to discrete jobs and repetitive schedules. Each accounting class includes distribution accounts and variance accounts. Also used in cost reporting.

Work in Process (WIP) move resource

A resource automatically charged to a discrete job or repetitive schedule by a move transaction. Resources are automatically charged when a forward move occurs, and uncharged when a backward move occurs.

Work items

Functions to be performed as part of the fulfillment of a service.

Work order date

The date to begin processing the paperwork for the discrete job. This date is offset from the start date by the preprocessing lead time.

Worker

An independent concurrent process that executes specific tasks. Programs using workers to break large tasks into smaller ones must coordinate the actions of the workers.

Workflow Engine

The Oracle Workflow component that implements a workflow process definition. The Workflow Engine manages the state of all activities, automatically executes functions, maintains a history of completed activities, and detects error conditions and starts error processes. The Workflow Engine is implemented in server PL/SQL and activated when a call to an engine API is made.

X

XML (extensible Markup Language)

XML is a method for putting structured data into a text file. It is a subset of SGML (Standard Generalized Markup Language), which is a system for tagging and organizing elements of a document (in the case of XML, that document is a text file). 'Structured data' would appear in such things as spreadsheets, configuration parameters, or financial transactions. Applications that produce such data often also store it on disk in either a binary or text format. If the data is stored in text, you can view it without having access to the application that created it. XML is a set of rules, guidelines, and conventions for designing text formats for such data in such a way that it is easy for computers to generate and read. Using XML to define data avoids such pitfalls as ambiguity, lack of extensibility, lack of support for internationalization or localization, and platform dependency.

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Z