

Oracle[®] Sales for Communications

Concepts and Procedures

Release 11*i*

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Oracle Sales for Communications Concepts and Procedures, Release 11i

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Preface

Welcome to the Oracle Sales for Communications 11*i*.

This Concepts and Procedures Guide provides information and instructions for understanding and using Oracle Sales for Communications application.

Intended Audience

This guide is aimed at the following users:

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

This guide assumes you have the following prerequisites:

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

Structure

This manual contains the following chapters:

“Understanding Oracle Sales for Communications” provides overviews of the application and its components, explanations of key concepts, features, and functions, as well as the application’s relationships to other Oracle or third-party applications. It also provides process-oriented, task-based procedures for using the application to perform essential business tasks.

Related Documents

For more information, see the following Oracle Sales for Communications documentation:

- *Oracle Sales for Communications Technical Reference Manual*
- *Oracle Sales for Communications Implementation Guide*

For additional information see the following manuals and guides:

- *Oracle Bill of Material User’s Guide*
This guide describes how to create various bills of materials to maximize efficiency, improve quality and lower cost for the most sophisticated manufacturing environments. By detailing integrated product structures and processes, flexible product and process definition, and configuration management, this guide enables you to manage product details within and across multiple manufacturing sites.
- *Oracle CRM Foundation Concepts and Procedures*
This guide describes Oracle CRM Foundation, including resource manager, notes, calendar, and territory management functionality.
- *Oracle Configurator User’s Guide*
This guide describes how to improve order taking and fulfillment productivity by eliminating errors in new sales orders and bills of materials. You can use Oracle Configurator to verify product configuration, automatically select configuration options, and generate manufacturing bills of materials according to configuration restraints.
- *Oracle Inventory User’s Guide*
This guide describes how to define items and item information, perform receiving and inventory transactions, maintain cost control, plan items, perform cycle counting and physical inventories, and set up Oracle Inventory.

- *Oracle Order Capture Concepts and Procedures*
This guide describes how to create and book quotes, adjust prices, and cross-sell or upsell. It also explains how to modify payment options.
- *Oracle Order Management User's Guide*
This guide describes how to enter sales orders and returns, copy existing sales orders, schedule orders, release orders, create price lists and discounts for orders, and create reports.
- *Oracle Pricing User's Guide*
This guide describes how to setup modifiers, price lists, formulas, pricing agreements, pricing rules, and pricing of special orders in Oracle Pricing.
- *Oracle SDP Provisioning Concepts and Procedures*
This guide describes how to automate provisioning for both simple and complex telecommunications services, configuration of multiple fulfillment elements, and fulfillment of bundled services consisting of voice, video, and/or data.
- *Oracle TeleSales Concepts and Procedures*
This guide describes how to perform quotes and orders, perform outbound calling campaigns, and improve productivity in a call center environment.
- *Oracle Workflow User's Guide*
This guide explains how to define new workflow business processes as well as customize existing Oracle Applications-embedded workflow processes. You also use this guide to complete the setup steps necessary for any Oracle Applications product which includes workflow-enabled processes.

Conventions

The following conventions are also used in this manual:

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

Understanding Oracle Sales for Communications

Introduction

Oracle Sales for Communications supports the business processes involved during the sales cycle of a communications service provider. Oracle Sales for Communications is integrated with Oracle's ERP and CRM applications and also supports integration with external systems. This integration provides extensive functionality to manage the business activities involved during the sales process. The eBusiness Center component provides the ability to create and maintain customer and account profiles.

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

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

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

Business Process Overview

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

- Product Catalog setup
- Customer Contact Management via Interaction Center

Product Catalog Setup

The Product Catalog contains all the products and services that are available to customers. Products and services are first defined as *items*.

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

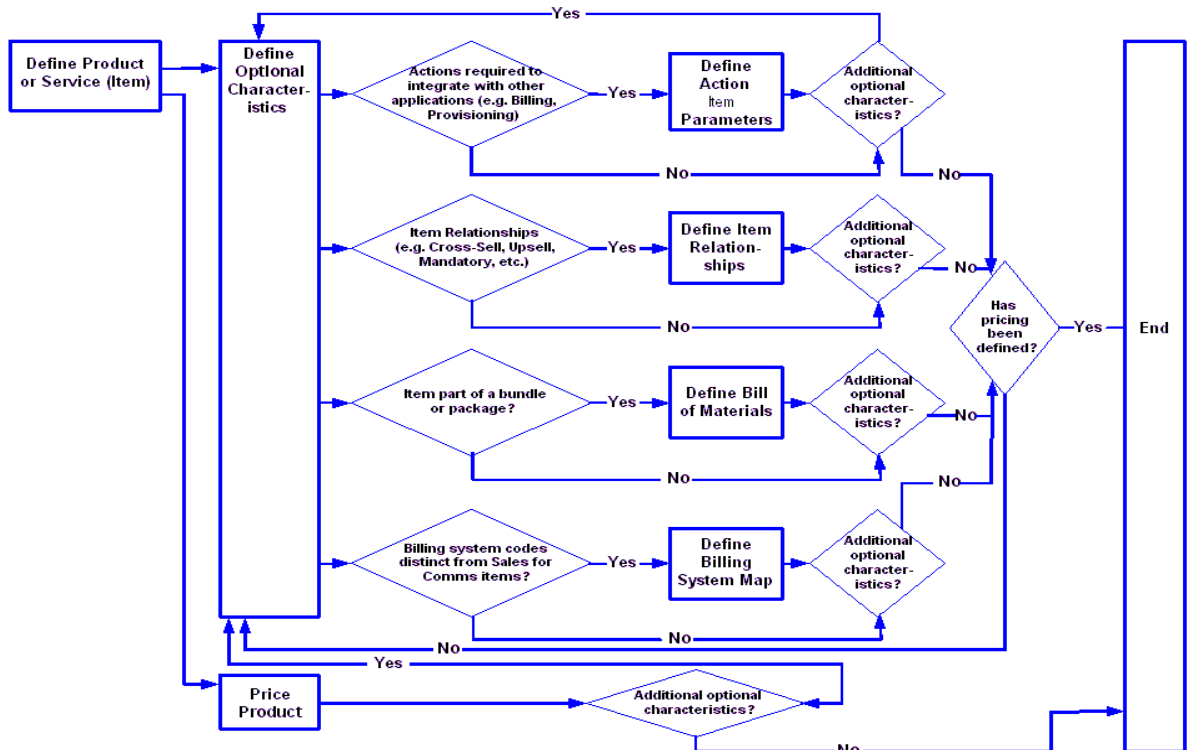
In the communications industry, products can have two different charge types:

- Recurring (Subscription)
- Non-recurring (One-time)

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

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

In addition to price lists, which are required, there are numerous optional product characteristics which can be defined in Oracle Sales for Communications.



Bill of Materials

Oracle uses the Bill of Materials construct to group individual items into packages. This allows you to create a new item (the package) which is actually comprised of one or more items. In Oracle Sales for Communications, a bill of materials can include all hard goods or all provisionable items, but should not mix the two together in the same bill.

Item Action Parameters

Oracle Sales for Communications allows attributes to be linked to the combination of an item and a service action. For example, adding DSL service for a customer is a different service event than removing DSL service. Adding DSL service will require

the capture of specific attributes, such as a service location, password, and password hint, that are not required for the removal of DSL service. Oracle Sales for Communications provides the ability to link these attributes to a specific item and action combination via the Item Action Parameters form.

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

Item Relationships

Oracle Sales for Communications allows items to be related to one another. Linking cross-sell, up-sell, and substitute products enables a call center agent to increase revenue during the sales process. Linking pre-requisite and conflicting items enables Oracle Sales for Communications to prevent the user from submitting an order with incompatible or improperly configured products.

Note: Cross-sell, up-sell, substitute, pre-requisite, conflict, and mandatory charge are six of the 14 seeded item relationships.

Billing System Map

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

Customer Contact Management via Interaction Center

Oracle Sales for Communications is an application to manage an enterprise Interaction Center. The Interaction Center allows a company to manage all inbound and outbound customer contacts, whether via telephone, email, web, or other medium, and centralize information from all contact points and interactions. Oracle Sales for Communications provides a history of all customer interactions. It provides customer and account management, lead and opportunity management, event management, and One-to-one Fulfillment.

This functionality includes:

- Creating or updated customer and account information
- Adding new products or services (Quotes and Orders) to a customer's account
- Change or remove existing products and services from the customer's Installed Base
- Create, save and retrieve quotes
- Place an order using a previously saved Quote
- Check the status of an existing Order
- Create or update a sales lead
- Qualify a sales lead into an opportunity

Issues

Oracle Sales for Communications relies heavily on TeleSales functionality.

Understanding Product Catalog

The Product Catalog refers to all the products or services which are available to customers.

Product Catalog Concepts

The following are Product Catalog concepts:

- Item
- Inventory Item Type
- Serviceable
- Activation Required

Item

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

customers. This is valuable for communications companies who often price their products differently for different types of customers, such as Business and Residential.

Inventory Item Type

Inventory Item Type is a field in the Main tab of the Inventory Master Item setup form. This is not a mandatory field, but it is a very important field! Oracle Sales for Communications uses the Inventory Item Type field to distinguish items with recurring charges from items with non-recurring charges. In Oracle Sales for Communications, a profile must be created so that there is a 'Recurring' user item type. Assuming this profile has been created, 'Recurring' will be in the User Item Type LOV.

Note: You must select 'Recurring' for recurring items (these are items that are neither stockable nor shippable) or the item will not appear in the run-time Product Catalog Navigation tree.

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

An item must be either Shippable, Stockable, and have a Recurring item type to appear in the tree. However, an item can be non-Shippable, non-Stockable, or with a Recurring item type. These items will not appear in the tree, but they can be related items to other items which do appear in the tree. As an example, a non-shippable, non-stockable, non-recurring installation charge can be a mandatory related item to an item which does appear in the tree.

Serviceable

Serviceable Product is a field in the Service tab of the Inventory Master Item Setup form. Any product that a service provider wishes to appear in the Installed Base must be set up as a Serviceable item.

Activation Required

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

Product Catalog Navigator

Product Catalog is used to setup products, associate products to one another, create prices and create categories for product navigation. Packages of products can also be set up using Oracle's Bill of Materials structure. Packages can have associated products or packages just like any other item. Packages also have prices and use the same product navigation structure.

Create products and packages with the following procedure

- Create Inventory Master Item
- Create BOM

Creating Inventory Master Items (Product or Service)

To create Inventory Master Item, perform the following steps.

Steps:

1. Navigate to Product Catalog: Product Catalog Setup: Product Catalog Setup Navigator
2. There are two ways to create a new Item. First, you can highlight the highest level in the Product Catalog Navigator, Right mouse click, and select New. This will bring up the Master Item screen (this works whether you are in View By BOM Type, Item Type, Catalog Group, or Status) Another way to create an item is to navigate to Inventory Product Catalog Setup: Setup: Inventory: Item Setup: Master Items).
3. Fill out the following fields:

- Item

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

- Description

4. Main tab

Fill out following values:

- Primary UOM (Unit of Measure)
- User Item Type.

Note: This is not a mandatory field, but it is a very important field! In Oracle Sales for Communications, a profile must be created so that there is a 'Recurring' user item type. Assuming this profile has been created, 'Recurring' will be in the User Item Type LOV. **You must select 'Recurring' for recurring items (these are items that are neither stockable nor shippable) or the item will not appear in the tree.**

If the User Item Type is blank and, later in the Inventory Master Item Setup Order Management tab, Shippable is checked, then the item will appear in the run-time Product Catalog Navigator tree. But, if the User Item type is blank and, on the Master Item Setup Order Management tab, Activation is required, then the item will not appear in the run-time Product Catalog Navigator tree. The combination of Item Type and the information in the Master Item Setup Order Management tab is very important.

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

5. Inventory tab

Fill out following values:

- Inventory Item. Inventory Item must be checked.

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

6. BOM tab.

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

7. Costing tab.

The information on the Costing tab is only necessary for physical goods managed via the Oracle Inventory application. See the Oracle Inventory Concepts and Procedures document for more information.

8. Purchasing tab.

The information on the Purchasing tab is only necessary for physical goods managed via the Oracle Inventory application. See the Oracle Inventory Concepts and Procedures document for more information.

9. Receiving tab.

The information on the Receiving tab is only necessary for physical goods managed via the Oracle Inventory application. See the Oracle Inventory Concepts and Procedures document for more information.

10. Physical Attributes tab.

The information on the Physical Attributes tab is only necessary for physical goods managed via the Oracle Inventory application. See the Oracle Inventory Concepts and Procedures document for more information.

11. General Planning tab.

The information on the General Planning tab is only necessary for physical goods managed via the Oracle Inventory application. See the Oracle Inventory Concepts and Procedures document for more information.

12. Arrow to the right for more tab options.

13. Select Order Management.

- Customer Ordered Enabled = Checked.

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

- Activation Required = Checked

Note: If this were a non-recurring or a shippable item, Activation Required would not be checked. Instead, Shippable would be checked.

14. Go to Invoicing tab.

The information on the Invoicing tab is only necessary for physical goods managed via the Oracle Inventory application. See the Oracle Inventory Concepts and Procedures document for more information.

15. Go to Service Tab.

- Serviceable Product = Checked

16. Save the item by select *File: Save and Proceed* from the toolbar menu, or by clicking the Save icon in the toolbar.

Creating Bill of Materials

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

The most common type of bill of material is a standard bill of material. A standard bill of material lists a fixed set of components associated with a package. Oracle Sales for Communications requires the use of Oracle Configurator to configure other BOM types which include optional features. See the Oracle Configurator Concepts and Procedures document for more details.

To create a BOM, perform the following steps.

Steps:

1. Navigate to Product Catalog: Product Catalog Setup: Product Catalog Navigator. Make sure the filter above the Product Catalog Navigator reads 'View By BOM Type'.
2. Expand the Product Catalog Navigator tree and find the item

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

3. Select Tools from the menu bar.

4. Select Bill of Materials. This will launch a Bills of Materials form for the item you have selected.
5. Click in Item Seq field. It will auto-populate the sequence.
6. Add all items to the BOM.

Note: A BOM should consist of either all provisionable goods or all shippable goods, but not a mix of both. Items of other types should be associated with the BOM via the Related Items feature.

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

Item Restrictions

Item Restrictions are intended to capture constraints on certain items. As an example, some items may only be offered to customers served by a certain type of network switch. Item Restrictions are not enforced in the base Oracle Sales for Communications product, although this can be accomplished with minor customization at implementation.

The Item Restrictions information can be used in combination with Oracle Pricing Qualifiers to determine customer eligibility for products. See *Oracle Pricing Concepts and Procedures* for more information.

Creating Lookups

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

- XNC_ADAPTER_TYPE
- XNC_FE_TYPE_NAME
- XNC_SW_GENERIC

To create Lookups, perform the following steps.

Steps:

1. Navigate to: Setup
2. Define Lookups to gain System Administrator privileges
3. Enter a query for the XNC_ADAPTER_TYPE, XNC_FE_TYPE_NAME, or XNC_SW_GENERIC)
4. Keep default value (User) for Access Level radio button

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

5. Enter values for the mandatory fields of Code and Meaning.
The value in 'Meaning' is the value that will appear in the LOV. Leave Tag blank; it is not required.
6. Select *File: Save and Proceed* from the toolbar menu, or click the yellow *Save* icon in the toolbar.

Setup Item Restrictions

To setup item restrictions, perform the following steps.

Steps:

1. Navigate to: Product Catalog: Product Catalog Setup: Setup: Item Restrictions
2. Verify that the correct organization is displayed.

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

- View - Query by Example:
- Enter (here enter a different organization if you do not want to accept the default.
- Click: View: Query by Example: Run.

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

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

- Query by Example:
 - Enter (enter the product name or portion of the name plus the % wildcard character).
 - Click: View: Query by Example: Run.
4. Select values from the LOVs for:
 - Element Name
 - Switch Generic
 - Adapter type
 - Description
 - Start Date

You should be able to enter values using the LOVs. You should be able to save the records.

Billing System Map

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

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

To access the billing system, perform the following steps.

Steps:

1. Navigate to: Product Catalog: Product Catalog Setup: Setup: Billing System Map
2. Select values for the following:
 - Billing System Name (note: this is an LOV, but it is not populated through Setup, Lookups. Rather, simply type in a Billing System Name, choose a Billing System Usage Type, enter a Billing System Reference Code, and save the record. This will put the Billing System Name in the LOV).

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

Item Action Parameters

Item Action Parameters capture the relationship between an item defined in the product catalog and the actions that can be performed on that item. This item-action combination is then linked to the set of attributes which are unique to ordering that item and action. If no attributes are specified, the item is still sellable, but merely has no associated attributes. A sub-action type is also specified to designate which systems have an interest in the attributes specified. Some data is of interest to provisioning systems, some to billing systems, some to various other down-stream systems involved in fulfilling a telecommunications service order. The sub-action type allows the application to segregate the data and channel it to the appropriate external system.

Actions include:

- Add
- Change
- Remove

Sub-actions include:

- Provisioning
- Billing Post Billing
- Post Provisioning
- Pre Order
- Provisioning
- Reserve
- Resource Date
- Test

To create item action parameters, perform the following steps.

Steps:

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

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

2. Find the item for which you want to create or modify Item Action Parameters.
3. Select the Action Type (Add, Change, or Remove).
4. Select Sub Action Type (Provisioning, Billing, Post Billing, Post Provisioning, Pre-Order, Provisioning, Reserve, Resource Date, and Test).
5. Input an Action Name.
6. Input an Action Description. This is a free-text field.
7. Input a Result Procedure. This is a free-text field.

Note: Synchronous indicates that some feedback or result is required. Asynchronous indicates that there is no need to wait for feedback from any auxiliary systems or workflows. Check Synchronous checkbox if the Item Action Parameter is synchronous.

The synchronous checkbox applies to all the Parameters that will be defined below.

8. Add the following parameters in the Main tab:
 - Sequence
 - Parameter Name

Note: The values to choose from in the Parameter Name field is a list of values drawn from Oracle's Foundation Lookups table. These values must be set up ahead of time using the Lookups Setup menu option. See Oracle Foundation Concepts and Procedures document for more details on Lookup tables.

- Description
 - Default Value
 - Display checkbox
 - Mandatory checkbox
 - Sys Defined checkbox
9. Accept the default start date or enter a different date in the Effectivity tab
 10. Enter an end date as needed.

Item Pricing

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

Setting up Item Pricing consists of performing the following:

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

Price lists are essential to ordering products. Each item entered on a Quote or Order must have a price. Each price list contains basic list information and one or more:

- Pricing lines
- Pricing attributes
- Qualifier
- Secondary prices lists

Basic information includes the:

- Price list name
- Effective dates
- Currency
- Pricing controls
- Rounding factor.

Setting Up Item Price List and Price List Lines

To setup Item Price Lists and Price List Lines, perform the following steps.

Steps:

1. Navigate to: Product Catalog: Setup: Pricing: Pricing Setup: Price Lists: Price List Setup
2. Enter a name for the new price list in Name field.
3. Enter a description in Description field.
4. Enter the price list currency in Currency (or accept the default currency).
5. Enter a rounding factor to be applied to the Price List in Round To.

A positive number indicates the number of places to the left of the decimal point; a negative number indicates number of places to the right of the decimal point. The default is -2.

6. Enter Effective Dates and Comments as desired.
7. Do the following in List Lines tab:
 - In Product Context field, select 'Item' from LOV. (This will automatically populate two other fields: Line Type which will be automatically populated with 'Price List Line,' and Application Method which will automatically be populated with 'Unit Price').
 - In Product Attribute field, select 'Item Number' from LOV.
 - In Product Value field, select the item name
 - In UOM field, select from the LOV (such as, Ea)
Note that Primary UOM field is not required.
 - In Value field, enter the charge or price for the item.

- In the Dynamic Formula and Static Formula fields, enter as necessary.
- In the appropriate fields, modify the start date and end date as desired.

Note: Repeat this step for every price list line that you want to create.

8. Save the record.

Setting Up Pricing Qualifiers

The following are components of Pricing Qualifiers

- Qualifier Context
- Qualifier Attributes
- Qualifier Group
- Qualifier

Qualifier Context

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

Qualifier Attributes

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

Qualifier Group

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

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

Qualifier

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

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

To setup Pricing Qualifiers, perform the following steps.

Steps:

1. Use one of these navigation paths:
Product Catalog: Product Catalog Setup: Setup: Pricing: Qualifier Setup, or
navigating to:
Product Catalog: Product Catalog Setup: Setup: Pricing
2. Create a Qualifier Group: In Name field, enter Qualifier Name.
3. In Description field, enter a description for the Qualifier Group.
4. In Context field, enter a Context. Qualifier Contexts are flex-fields. Contexts might include:
 - Customer
 - Client
 - Global Data Elements
 - Geography
 - Modifier Lists
 - Order
 - Segments
 - Terms
 - Territories
 - Territory
 - Volume
5. In Attribute field, enter an attribute.

Note: Attributes are flexfields.

6. Select an Operator. Operators can include: '=', 'BETWEEN,' and 'Not =.'
7. Select 'Value From.'
8. Save the record.

Setting Up Discounts

To setup Discounts, perform the following steps.

Steps:

1. Identify the product you want to discount
2. Navigate to: Pricing: Modifiers: Modifier Setup.
3. In Product Attribute field, select 'Item Number'
4. In Attribute Value field, enter the item name
5. Ensure that all mandatory fields are entered.
6. Save the record.

Item Relationships

Setting Up Item Relationship

Items can be related to one another.

To setup Item Relationships, perform the following steps.

Steps:

1. Navigate to Product Catalog: Product Catalog Setup: Inventory: Item Setup: Item Relationships. A 'Find' window will appear. Unless you wish to find an existing Item Relationship, close the 'Find' window.
2. In the 'From' field, either enter the Item for which you wish to create a relationship or select the Item using the List of Values.
3. In the 'To' field, either enter the second Item in the relationship or select the Item using the List of Values.
4. In the 'Type' field, select the Relationship Type. Relationship Types include:
 - Related
 - Substitute
 - Cross-Sell
 - Up-Sell
 - Service

- Pre-requisite
 - Collateral
 - Superseded
 - Complimentary
 - Impact
 - Conflict
 - Mandatory Charge
 - Optional Charge
 - Promotional Upgrade
5. Check the 'Reciprocal' checkbox if the relationship is reciprocal. (Example, if you have two items which are substitutes for one another, you may wish to create a reciprocal relationship).
 6. Save the record.

Setup Categories and Prices

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

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

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

Setting Up a New Category

To setup a new Category, perform the following steps:

Steps:

1. Navigate to: Product Catalog: Product Catalog Setup: Product Catalog Setup Navigator.
2. **Change the filter to Categories & Prices or Click the Categories & Prices icon**
3. **Click Maintain Categories/Price Lists button.**
4. **Enter the name for the new category.**
5. **In Effective Date field, keep the default effect date, or Enter the date you want the category to become effective.**

Note: Backdating is permitted.

6. In Effective to field, either enter an end date, or leave blank.
7. Enter a description for the category in Description field.
8. Save

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

Adding Category to Tree

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

To add a Category to a tree, perform the following steps.

Steps:

1. Navigate to Product Catalog: Product Catalog Setup: Product Catalog Navigator
2. Select Categories and Prices icon
3. Click on Add Node button.
New Node screen will appear.

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

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

Assigning Price Lists to a Category

To assign a Price List to a Category, perform the following steps.

Steps:

1. Navigate to Product Catalog: Product Catalog Setup: Product Catalog Setup Navigator
2. Change the filter to Categories & Prices, or Click the Categories & Prices icon
3. Select the category to which you want to add a Price List
4. Click the Add Node button
5. Select Price List for the Node Type radio button,
6. In the Name field use the LOV to find the Price List you want to add to the Category, or Query the Price List you want to add.
7. Select a start date and end date (if needed).
8. Click OK
9. Verify that the Price List appears under the category in the tree. You may need to collapse the tree and then expand it to refresh. (i.e. click the minus icon to the left of Catalog Setup in the tree. Click again to expand).

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

Setting an End Date for a Category

To set an End Date for a Category, perform the following steps.

Steps:

1. Click on (highlight) the Category you wish to end-date.
2. Click the Properties button.
This will launch the Node Type window.
The Name field should be populated with the Category you have selected.
3. Click in the Effective To field.
4. Click the LOV ellipsis.
5. Select the current date from the calendar widget.
6. Click OK.
7. Refresh the Product Catalog Navigator tree (i.e. click the minus icon to the left of Catalog Setup in the tree. Click again to expand).
8. Verify that the category has been end-dated.
You should see a red X, rather than a folder icon, to the left of the Category name. This indicates that it has been end-dated.

Product Catalog Navigator Form

‘View By’ Categorization

The Product Catalog Setup Navigator tree includes a ‘View by’ filter. You can view by:

- BOM Type
- Item Type
- Catalog Group
- Status

Expand Product Catalog Setup Tree

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

Understanding Customer and Account Management

Accessing Work via Oracle Universal Work Queue

After you log into Oracle Applications, you can access Universal Work Queue through the Navigator. To log into Oracle Applications, perform the following steps

Steps:

1. Select Universal Work Queue from the Navigator.

All work items in the queue for the agent will display under My Work in Universal Work Queue.

2. Select the work type to handle from My Work

Note: Once you select the work type, the associated work items associated will display in the right pane of Universal Work Queue.

3. Select the work item to be worked.

4. Select the Get Work button.

Note: The system will take you to the appropriate form based upon the work type selected.

Managing Customers

Contact Types

There are three contact types:

- Person
- Organization
- Relationship

Persons (Consumers)

The individuals who are not purchasing on behalf of an organization. A consumer can have multiple addresses and phone numbers. For example, a consumer can have a home address and multiple shipping addresses for vacation homes, friends, and relatives.

Organization

The contact type when a Business or Organization is represented. Any individual at an organization can be your business customer. This includes a subsidiary or a branch of a company, an association, a church, or a government branch. An organization can have multiple contacts and addresses.

Relationship

This type of contact indicates a Person's relationship with an Organization. As an example, assume James Johnson is a Person and BusinessWorld is an Organization. If James Johnson were an employee of BusinessWorld, then 'James Johnson as an employee of BusinessWorld' is a relationship.

Creating an Organization

To create an Organization, perform the following steps.

Steps:

1. Navigate to Customer Management: eBusiness Center
2. Click the 'New' button.
This should launch a pop-up window asking whether you want to create an Organization, Person, or Both. This should launch a pop-up window.
3. Choose Organization
4. Enter the information in the top section of eBusiness Center as it pertains to the organization.

Enter information in the following fields:

- Organization Name
- Relation (required field)

Either accept the default Relation, or select Contact as the relationship for the organization.

Note: Once you enter the name for the new organization, the system will automatically add the name of the organization to the View Details For radio button in the top section of the eBusiness center.

- Phone

Enter the phone number for the organization.

Note: The Type field will default to Inbound WATS. You can change the value if the phone number you enter is for a number other than that assigned to incoming calls.

- Email

Enter the email address, if known, for the organization.

Note: The email address will display in the color green to indicate that you can launch an email session directly from eBusiness center.

- Address (required field)

Enter the address for the organization. When you access the Address field, the system will automatically default the country value in the Country field. You can enter extended addressees by selecting the button next to the Address field. You may add up to 3 additional lines of address information. The ellipse button next to the Address field is used to perform a lookup of addresses in the database.

- City

- State

- Province

- County

- Country (required field). The country will default in this field as a result of the address field. If the country is other than the default, select the country from the list of values.

5. Save the record.

Creating a New Contact

Contacts are linked to organizations. There can be multiple contacts for an organization. Each contact must be associated to an address. Additionally, there may be multiple contacts for an address and conversely, a single contact to multiple addresses.

To create a new Contact, perform the following steps.

Steps:

1. Navigate to eBusiness Center > Person tab

2. Click Details.

The Person Details window appears.

3. Enter information about the contact.

You must enter at least the contact's name and business phone number. Business phone numbers are considered as the primary phone numbers for the contact and are listed as phone numbers for the organization.

4. Select business from the Type drop-down to the right of the business phone number entered.

If you are entering a contact at a new organization, then:

- Select the Organization Address tab.
- Enter the organization's primary address.
This should be the main address such as the organization headquarters.
- Make a note to enter the rest of the organization information once you are done adding the contact.

5. Select the Person Address tab.

6. Enter the contact's business address.

Make sure that Business is selected from the drop-down box.

Note: If you make no entry here, the contact's business address will default to the primary business address for the organization.

7. Click Save or Save icon from the toolbar.

Note: If you wish to enter additional addresses for the contact, such as private and mailing addresses, then repeat the following steps for each address:

- Select the Type of address you wish to add from the drop-down list
 - Enter information
 - Click Save or Save icon from the toolbar
-
-

8. Navigate to the Person tab.
9. Enter additional optional information about the contact including the name pronunciation, job role, and manager name.
10. Click Save or Save icon from the toolbar.
11. Click Detail.

The Contact Detail window appears.

12. On different tabs enter details about the contact including the contact's job and personal history, interests and personality traits.
13. Click Save or Save icon from the toolbar.

Establishing Relationship Between a Contact and an Organization

This procedure is used to create the relationship between a contact and an organization. For example, a Customer Service Representative (CSR) receives a call from a contact informing the CSR that they no longer are employed with their previous employer and is currently working for another organization.

To establish the relationship between a contact and organization, perform the following steps.

Steps:

1. Navigate to eBusiness Center > Relationship Tab
2. Select the Inactive radio button to change the relationship of the contact with the organization.
3. Click Save or Save icon from the toolbar.
4. Click New button in the top section of eBusiness Center.

5. Select the new organization.
6. Enter the new organization.
7. Enter the relation for the new organization.
8. Enter the address.
9. Enter the phone number.
10. Enter the email address
11. Click Save or Save icon from the toolbar.

To enter additional information about the contact (such as personal information, etc.), perform the following steps.

Steps:

1. Select the Person tab.
2. Select the Details button.
3. Enter the information that is pertinent to the contact.
4. Click Save or Save icon from the toolbar.

Defining the Relationship Between Organizations

This procedure is used to establish and create a relationship between two organizations. For example, as call is received from a contact to advise that her company was recently acquired and now all account payables are being handled by the parent company.

To define a relationship between organizations, perform the following steps.

Steps:

1. Navigate to eBusiness Center > Relationship Tab
2. Enter the new relationship for the parent organization the Object Relationship section.

A Customer Service Representative should use the Relationship tab to define an organization as a subsidiary of another organization.

3. Select the Address tab.
4. Deactivate the current billing address.

5. Select the new address from the list of values.
6. Select Billing from the list of values in the Site Use Type field.
7. Select New button in the top section of eBusiness Center.
8. Enter a new contact for the organization.
9. Enter the data for the new contact.
10. Click Save or Save icon from the toolbar.

Managing Accounts

In addition to defining a name, address, organization and other details about a customer or contact, Oracle Sales for Communications also allows you to create accounts for customers. Accounts are common in the telecommunications industry, and are often used for billing purposes.

In Oracle Sales for Communications, a customer can have more than one account. There can also be multiple contacts on an account. As an example, one person can be a guarantor on another person's account.

Creating a New Account

To setup a New Account, perform the following steps.

Steps:

1. Navigate to Customer Management: eBusiness Center
2. Create New Customer
3. Select the Accounts tab
4. Click the New Accounts button
5. Enter an Account Name (if needed).
6. Accept the default Account Activation Date, or Enter a different date.
7. Save.

Note: A customer can have more than one account. Accounts can be either active or inactive.

Account Attributes

The following information is summarized in the Accounts tab:

Note: only the Activation Date and Account Status are required.

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

Account Details

Account Details provide additional information about the account. This information is available from 6 tabs within the Account Details.

These tabs include

- Credit
- Billing Preferences
- Roles
- Suspensions
- Sites
- Relationships

Credit This tab is used to capture Credit information, such as credit rating and risk code.

Billing Preferences This tab is used to capture Billing Preferences information, such as Bill Type, Bill Language, Media Format, and Statement Cycle.

Roles This tab is used to capture information on different roles on the account. Seeded role types include Contact and Guarantor.

Suspensions This tab captures information on account suspensions, including beginning and ending dates of suspension and reasons for the suspension.

Sites This tab captures information on multiple sites and site uses for the account. There are multiple site uses including Bill To, Ship To, and Statements.

Relationships — Parent Account This tab allows you to create parent and child accounts. As an example, one account can be a 'child account' to a 'parent account.' To find or create account details, perform the following steps.

Steps:

1. Navigate to eBusiness Center.
2. Select find or create a new contact.

If there are no accounts for the contact, go to the Accounts tab and create an account (see Create New Account).

To view or create account details, either double-click on an account from the spreadtable or select an account in the spreadtable and click the Details button.

Modifying Account Information

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

Disconnect Account

Deactivating an account will not disconnect each product or service on the account. You will need to disconnect each product or service on the account separately. These steps are described in the Installed Base sections.

Understanding Order Capture and Order Management

The Order Capture Navigator includes the following screens:

- Product Catalog Navigator
- Installed Base Navigator
- Order Navigator
- Quote Navigator

All screens follow the same format. Each screen is composed of three separate panes. They are:

Caller Information Pane

The first pane is the Caller Information Pane that spans the top portion of the screen. This contains details regarding the person calling, and a button that allows the user to go directly to the Order Workbench screen.

Tree Navigator Pane

The second pane is the Tree Navigator Pane below the Caller Information Pane on the left side of the screen. This pane allows a user to search for customer offerings by organizationally defined categories. This pane also provides access to the other order capture navigation screens, and allows the user to view the details of a selected product or place that product on an order.

Details Pane

The Details pane contains more detailed information regarding the user's selection from the navigation pane or from the search capability in the Details pane.

Using the Tree Navigator

The tree navigator allows nodes to be expanded or collapsed. Each node in a tree with children nodes beneath it can be expanded or collapsed by clicking on that node. Expandable nodes have a '+' to their left, collapsible nodes have a '-' to their left. When a user navigates to an item in the tree that is a leaf level item, the 'View Details' button and the 'Add to Order' will be active. By clicking on the 'View Details' button, the leaf level item selected in the tree will be displayed on the Product Details screen to the right with all of its detail level information. By clicking the 'Add to Order' button, the leaf level item selected in the tree will be added directly to the Order Workbench.

Tree Icons

There are four icons, stacked vertically, on the left hand side of the Tree window.

Product Catalog icon: The first, or topmost, of these icons is the Product Catalog icon. Placing the mouse over this icon will popup a text box of 'Product Catalog.'

Clicking this icon will change the Navigator tree to the Product Catalog Navigator and will collapse the tree to the highest level. If you are already in the Product Catalog Navigator, clicking this icon will only collapse the tree to the highest level.

Installed Base icon: The second icon is the Installed Base icon. Placing the mouse over this icon will popup a text box of 'Installed Base.'

Clicking this icon will change the Navigator tree to the Installed Base Navigator will collapse the tree to the highest level. If you are already in the Installed Base Navigator, clicking this icon will only collapse the tree to the highest level.

Orders icon: The third icon is the Orders icon. Placing the mouse over this icon will popup a text box of 'Orders.'

Clicking this icon will change the Navigator tree to the Order Navigator and will collapse the tree to the highest level. If you are already in the Order Navigator, clicking this icon will only collapse the tree to the highest level.

Quotes icon: The fourth icon is the Quotes icon. Placing the mouse over this icon will popup a text box of 'Quotes.'

Clicking this icon will change the Navigator tree to the Quote Navigator and will collapse the tree to the highest level. If you are already in the Quote Navigator, clicking this icon will only collapse the tree to the highest level.

The 'View By' filter

There is a 'View By' filter for every Navigator tree. The 'View By' filter can be used to restrict or filter the information presented in the Navigator tree. The 'View By' filter can be changed by selecting from the drop-down box.

The following are 'View By' filters:

Product Catalog Navigator

- 'View By' Categories
- 'View By' All Price Lists

Installed Base Navigator

- 'View By' Active
- 'View By' All

Order Navigator

- 'View By' Status
- 'View By' Number

Quote Navigator

- 'View By' Status
- 'View By' Number

Using the Product Catalog Navigator

Viewing Product Information

There are multiple ways to select products, which can then be added to a Quote or Order.

To view product information perform the following steps.

Steps:

1. Select Item from tree.
2. Navigate to Customer Management: eBusiness Center.
3. Select or create a contact.
4. Press the Quotes and Orders tab.
5. Click 'New.'
6. Select Category in the Product Catalog Navigator tree.
7. Select Price List.

8. Select Product.
9. Click 'Add to Order' button at the bottom of the tree.

View Product Details Tabs

More detailed information regarding a selected product can be found by choosing from the various tabs at the bottom of the screen. The tabs are Charges, Details, Alternate Price Lists, and Related Items.

Setting Up Order Management

Order Management Transaction Types

Oracle Sales for Communications uses three transaction types:

- ADD
- CHANGE
- REMOVE

These transaction types are not seeded in Order Management and, hence, must be added to Order Management before a Oracle Sales for Communications quote or order can be taken.

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

To create Order Management Transaction Types, perform the following steps.

Steps:

1. Navigate to Setup: Transaction Types: Define

Note: You may need Order Management or System Administrator privileges

2. Input Transaction type = ADD
3. Input Transaction Type Code = Line
4. Order Category = Order
5. Save the record.

6. Repeat steps 2-5 for Transaction types of CHANGE and REMOVE.
7. Close window.

Setting Up Line Flows

To setup Line Flows, perform the following steps.

Steps:

1. Navigate to: Setup: Transaction Types: Define

Note: You may need Order Management or System Administrator privileges

2. Click the Assign Line Flows button.
3. Enter values based on the following table:

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

4. Save the records.

Working with Quotes

Oracle Sales for Communications allows you to create and save Quotes. A quote is an offer to a customer. You create a quote automatically when you select at least one item for a customer and select [Add to Order.]

Oracle Sales for Communications automatically assigns a number to the Quote and saves the Quote. This number appears in the Contact Information region. The Quote number is composed of the Quote number itself and a version number that increments each time you create a new Quote version. New versions will only be created if the quote is in Bid status. See the Oracle Order Capture Concepts and Procedures document for more information about quote statuses and allowed transitions for quote statuses.

Quote Status provides additional information on how the negotiations with the customer are progressing. It also determines what kind of changes you and anyone else working with you can make to the quote.

Quotes can also be converted into Orders. This requires the use of the Workbench Button

The Workbench button is located in the Order Capture Customer Information block. The Workbench button is initially inactive and is grayed out. The Workbench button becomes active when a Quote has been created from the Product Catalog Navigator.

Clicking the Workbench button launches the Order Workbench.

Creating a Quote

To create a Quote, perform the following steps.

Note: You must select a customer in order to create a quote.

Steps:

1. Navigate to Order Management: Order Capture Navigator
2. Find the customer
3. Product Catalog Navigator tree
4. Expand Categories & Prices
5. Find the product in which the customer is interested
6. Click Add To Order for as many product as customer wants
7. Click on Workbench on the customer contact information screen.
This will bring information about Quotes and Lines

Note: You must capture required item action parameters

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

Finding a Quote

To find an existing Quote, perform the following steps.

Steps:

1. Navigate to Customer Management: eBusiness Center
2. Find the customer
3. Click on Quotes and Orders tab

The Quotes and Orders for the customer selected will appear.

4. Click Details to view the details for the Quotes and Orders.

This will launch the Order Capture Navigator.

5. Click the Quotes icon to the left of the tree navigator.
6. Identify the quote you wish to view. Either double-click the quote or click the Show Details button.

The Quote information will appear in the Quote Details window.

Understanding Quote Expiration

Quotes can have an expiration date. After this expiration date, the Quote cannot be submitted as an order. The default expiration date is one month after the date the Quote is created.

Modifying or Updating a Saved Quote

A quote can be submitted as an order. Note that you can add and remove items from a Quote via the Workbench.

Quote Status

The following Quote statuses are available:

Drafted: Initial status.

Bid: Presented to a customer.

Accepted: Customer accepted terms.

Order Problem: There is a problem with placing the order.

Order Reviewed: The order has been reviewed for rules and processes.

Ordered: The order has been sent on for processing.

Lost: The Quote has not been accepted by the customer.

Inactive: No more activity on this Quote.

Note: For more information on creating other quote statuses and the allowable transitions between quote statuses, see the Oracle Order Capture Concepts and Procedures document.

Workflows

Oracle Sales for Communications utilizes Oracle Workflow to control the sequence of events that occur in processing of orders. Oracle Workflow manages the state of activities for an order, automatically executes functions and sends notifications, maintains a history of completed activities, and detects error conditions and starts error processes.

Oracle Sales for Communications workflow executes Order Management workflows for shippable items. For non-shippable, or provisionable items, Oracle Sales for Communications has its own workflow.

Working with Orders

The Order Workbench

After a Quote has been created, you must launch the Order Workbench to add additional information (such as provisioning parameters) to the Quote or to convert the Quote into an Order.

The Order Workbench consists of:

Caller Information Pane

The Caller Information Pane spans the top portion of the screen and contains details regarding the customer and account.

Header Tab

This screen includes information such as Bill-to and Ship-to Address and Payment information. It also includes subtotal information for Recurring and One-time Charges. Billing and shipping address information applies to all order lines unless otherwise specified on the individual order line. Payment information applies to the entire order.

Lines Tab

The Lines tab includes the products and services on the given Quote or Order.

Tabs in the Lines Tab

There are five tabs in the Lines tab of the Order Workbench. These tabs are based upon the item selected from the Order Lines (Such as, if you select Item A and then click one of these tabs, you get the information for Item A. If you select item B and then select one of these tabs, you will only get the information for Item B). These tabs include:

Details Tab: If the item selected is a BOM (i.e. a kit or a package), this screen will list which components comprise the BOM.

Alternate Price Lists Tab: This screen allows you to search through all of the other price lists where the selected product exists. All alternate price lists upon which the product is listed will appear; however only price lists in the same currency can be selected.

Related Items Tab: This tab contains the items related to the product on the order line. The seeded relationships include cross-sell, up-sell, substitute, exclusive and required. This tab does not include related items of the type Mandatory Charge or Optional Charge.

Related Charges Tab: This tab contains all mandatory and optional charges for the product selected on an order line.

Provisioning Tab: The provisioning tab allows you to capture all of the parameters necessary to provision a communications order.

Booking an Order

To book and Order, perform the following steps.

Steps:

1. Navigate to Customer Management: eBusiness Center
2. Select or create a contact.
3. Press the Quotes and Orders tab.
4. Click 'New'
5. Product Catalog tree
6. Expand Categories & Prices
7. Find the Product in which the customer is interested
8. Click Add To Order
9. Click on Workbench on the customer contact information screen.
This will bring information about Quotes and Lines

Note: You must capture item action parameters designated as mandatory.

10. Click the [Book Order] button to create the order.

Order status

The following Order Statuses are available:

New: Signifies that the order processing has not yet begun and you can still make changes to the order.

Open: Signifies that the order is in process. You cannot make changes to an Open order.

Canceled: Signifies that the order has been canceled by the customer.

Closed: Signifies a completed order.

Error: Signifies that there is a provisioning error with the order.

Adding One-time (Non-recurring) Charges

One-time charges, associated with an item with a recurring charge, will appear as either Optional or Mandatory Charges in the Related Charges tab on the Order Workbench.

To add one-time changes, perform the following steps:

Steps:

1. Select the Lines tab from the Order Workbench.
2. Select the Order Line for which there is a One-time Non-Recurring non-shippable charge (such as, an installation charge).
3. Click the Related Charges tab.
4. Identify the charge to be added.
5. Click the Apply button.

Viewing and Adding Related Items

From the Order Workbench, you can view Related Items (such as Cross-Sell and Upsell) and add them to the Order.

To view and add related items, perform the following steps:

Steps:

1. Select the Lines tab from the Order Workbench.
2. Select the Order Line for which there are Related Items.
3. Click the Related Items tab.
4. Identify the related item to be added.
5. Click the Add Item button.

Specifying Line-Level Ship-To Address

Ship-to Address is specified at the Order Header level. That means it applies to the entire order, unless overridden at the Line level.

To specify line-level ship-to address, perform the following steps.

Steps:

1. Select the Lines tab from the Order Workbench.
2. Select the Order Line for which a different address is desired.
3. Click the Address button. This pops up a Shipment/Payment pop-up box.
4. Select a different Ship-to Address.
5. Click the OK button.

Repeat for any additional lines where the address from the address at the header level.

Specifying Line-Level Due Date

Request Date is specified at the Order Header level. That means that it applies to the entire order, unless overridden at the Line level.

To specify line-level due dates, perform the following steps.

Steps:

1. Select the Lines tab from the Order Workbench.
2. Select the Order Line.
3. Click the Address button. This pops up a Shipment/Payment pop-up box.
4. select the requested due date in the Requested Date field
5. Click the OK button.

Repeat for any additional lines where the request date differs from the request date at the header level.

Orderable Button

This button will perform the configuration checks on the selected line that confirm that the item is ready for ordering. These configuration checks consist of making sure that all pre-requisite and co-requisite products have been ordered, that the product does not conflict with any other item on the order or in the installed base, and that all mandatory charges and parameters have been assigned. Failing any of these checks, an error message will pop up.

Shipping Charges

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

Quantity

Note that for shippable goods, the multiple items can be ordered on a single order line (i.e. the quantity can be greater than one). For non-shippable items, the quantity must be one (per order line).

Provision Parameters

Use the Provisioning tab to capture all of the parameters necessary to provision an order. Mandatory parameters, such as, parameters that need to be captured for an order to go through, are indicated via the Mandatory check box to the right of the parameters table. Mandatory parameters will be sorted so that they appear first in the table before any non-mandatory parameters.

When the customer will supply the information for the parameter, the value in the 'Source' column will be 'Customer.' An example of a customer-supplied parameter is the number of rings before the caller is sent to voicemail.

However, where Oracle Sales for Communications has been customized to receive parameter values from external systems, the Assign button captures the value for that parameter. If a value assigned is later determined to be undesirable, it can be reversed in the external system using the "Unassign" button.

Finding an Existing Order

To find an existing order, perform the following steps.

Steps:

1. Navigate to Customer Management: eBusiness Center
2. Find the customer.
3. Click on Quotes and Orders tab.

The Quotes and Orders for the customer selected will appear.

4. Click Details to view the details for the Quotes and Orders.

This will launch the Order Capture Navigator.

5. Click the Orders icon to the left of the tree navigator.
6. Identify the order you wish to view. Either double-click the order or click the Show Details button.

The order information will appear in the Quote Details window.

Copying an Existing Order

There may be times when you wish to copy an existing order. This can save you time from entering the order anew.

To copy an existing order, perform the following steps.

Steps:

1. Find the order (see Finding an Existing Order).
2. Click the Copy Order button.

This will launch the Order Workbench with the same information as in the original order.

Canceling or Suspending an Existing Order

To cancel or suspend an existing order, perform the following steps.

Note: Only orders with a Status of 'New' can be canceled.

Steps:

1. Navigate to Customer Management: eBusiness Center
2. Find the customer
3. Click on Quotes and Orders tab
4. The Quotes and Orders for the customer selected will appear.
5. Click Details to view the details for the Quotes and Orders.
6. This will launch the Order Capture Navigator.
7. Click the Orders icon to the left of the tree navigator.
8. Expand New Orders.

9. Select the order you wish to cancel. Either click the Show Details button or double-click the order.
10. Click Tools from the menu bar.
11. Select either Cancel Order or Suspend Order.

Working with Installed Base

The Installed Base provides information on the products and services a customer has. Products and Services designated as Serviceable items in the Product Catalog appear in the Installed Base either after they have been shipped or after they have been fulfilled.

Installed Base Navigator

The Installed Base provides information on the products and services a customer has ordered over time.

Prerequisites: You must first select a customer or account before you can view Installed Base information.

Viewing Installed Base Information

To view the Installed Base information, perform the following steps.

Steps:

1. Navigate to Customer Management: eBusiness Center
2. Select or create a contact.
3. Press the Quotes and Orders tab.
4. Click 'New.'

Note: Alternative navigation is to navigate to Order Management: Order Capture Navigator

5. Click the icon for the Installed Base Navigator.

The Product Catalog Navigator will default as the first screen.

You can either 'View By All' to see all products or services the customer or account has ever ordered. Or, you can 'View By Active' to see only the active products for that customer or account.

Items will be grouped by Service Key. Service Key might be a telephone number or an e-mail address; it is a unique identifier.

6. Select the Service Key of interest.
7. Select the item from the Installed Base.

You can either click the Show Details button or simply double-click the item to see the item details.

Changing or Removing Existing Service

To change or remove an existing service, perform the following steps.

Steps:

1. Follow 'View Installed Base Information' steps.
2. Select the item you wish to change or remove.
3. Click either the Change or Remove button.

This will create a quote to change or remove. Continue with all items you wish to change or remove.

4. Click the Workbench button.
5. Make any necessary changes (such as, Installed Base Parameters).
6. Click the Book Order button.

