Oracle ® Customer Care

Implementation Guide

Release 11*i*

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Oracle Customer Care Implementation Guide, Release 11*i*

Part No. A92142-01

Contents

A Enabling Relationship Plans

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Oracle Customer Care Implementation Guide, Release 11*i*

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If you have problems with the software, please contact your local Oracle Support Services.

Preface

Audience for This Guide

Welcome to Release 11*i* of Oracle Customer Care Implementation Guide.

This guide assumes you have a working knowledge of the following:

- The principles and customary practices of your business area.
- ***Oracle Customer Care***

  If you have never used ***Oracle Customer Care***, Oracle suggests you attend one or more of the ***Oracle Customer Care*** training classes available through Oracle University.
- The Oracle Applications graphical user interface.

  To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This document contains the information you need to understand and use ***Oracle Customer Care***.

- Chapter 1 provides overviews of the application and its components, explanations of key concepts, features, and functions.
- Chapter 2 provides detailed task based procedures for implementing and setting up Oracle Customer Care.

- Appendix A provides a technical description of how to enable relationship plans.
- Appendix B provides technical details about the seeded relationship plan.
- Appendix C is a list of frequently asked questions concerning setting up relationship plans.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle Corporation is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at http://www.oracle.com/accessibility/.

Accessibility of Code Examples in Documentation

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.

Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of ***Oracle Customer Care***.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on MetaLink.

Related Documentation

Oracle Customer Care shares business and setup information with other Oracle Applications products. Therefore, you may want to refer to other product documentation when you set up and use ***Oracle Customer Care***.

You can read the documents online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at http://oraclestore.oracle.com.

Documents Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of ***Oracle Customer Care*** (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing "Getting Started with Oracle Applications" from any Oracle Applications help file.

Documents Related to This Product

Oracle Customer Care Concepts and Procedures

This guide provides information required for using Oracle Customer Care.

Oracle Support Implementation Guide

This guide provides information required for implementing and setting up Oracle Support. Oracle Support provides the functionality required for using service requests.

Oracle Support Concepts and Procedures

This guide describes how to use Oracle Support. Oracle Support provides the functionality required for using service requests.

Oracle Service Implementation Guide

This guide describes how to implement and setup Oracle Service. Oracle Service provides the functionality required for Counters and Charges.

Oracle Service Concepts and Procedures

This guide describes how to use Oracle Service. Oracle Service provides the functionality required for Counters and Charges.

Oracle Contracts for Service Concepts and Procedures

This guide explains how to set up and use Oracle Contract for Service to provide service entitlement when supporting a customer.

Installation and System Administration

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*. It provides a useful first book to read before an installation of Oracle Applications. This guide also introduces the concepts behind Applications-wide features such as Business Intelligence (BIS), languages and character sets, and Self-Service Web Applications.

Installing Oracle Applications

This guide provides instructions for managing the installation of Oracle Applications products. In Release 11*i*, much of the installation process is handled using Oracle Rapid Install, which minimizes the time to install Oracle Applications, the Oracle8 technology stack, and the Oracle8*i* Server technology stack by automating many of the required steps. This guide contains instructions for using Oracle Rapid Install and lists the tasks you need to perform to finish your installation. You should use this guide in conjunction with individual product user's guides and implementation guides.

Oracle Applications Supplemental CRM Installation Steps

This guide contains specific steps needed to complete installation of a few of the CRM products. The steps should be done immediately following the tasks given in the Installing Oracle Applications guide.

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and

lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Maintaining Oracle Applications

Use this guide to help you run the various AD utilities, such as AutoUpgrade, AutoPatch, AD Administration, AD Controller, AD Relink, License Manager, and others. It contains how-to steps, screenshots, and other information that you need to run the AD utilities. This guide also provides information on maintaining the Oracle applications file system and database.

Oracle Applications System Administrator's Guide

This guide provides planning and reference information for the Oracle Applications System Administrator. It contains information on how to define security, customize menus and online help, and manage concurrent processing.

Oracle Alert User's Guide

This guide explains how to define periodic and event alerts to monitor the status of your Oracle Applications data.

Oracle Applications Developer's Guide

This guide contains the coding standards followed by the Oracle Applications development staff. It describes the Oracle Application Object Library components needed to implement the Oracle Applications user interface described in the *Oracle Applications User Interface Standards for Forms-Based Products*. It also provides information to help you build your custom Oracle Forms Developer 6*i* forms so that they integrate with Oracle Applications.

Oracle Applications User Interface Standards for Forms-Based Products

This guide contains the user interface (UI) standards followed by the Oracle Applications development staff. It describes the UI for the Oracle Applications products and how to apply this UI to the design of an application built by using Oracle Forms.

Other Implementation Documentation

Oracle Workflow 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 that includes workflow-enabled processes.

Oracle Applications Flexfields Guide

This guide provides flexfields planning, setup and reference information for the ***Oracle Customer Care*** implementation team, as well as for users responsible for the ongoing maintenance of Oracle Applications product data. This manual also provides information on creating custom reports on flexfields data.

Oracle eTechnical Reference Manuals

Each eTechnical Reference Manual (eTRM) contains database diagrams and a detailed description of database tables, forms, reports, and programs for a specific Oracle Applications product. This information helps you convert data from your existing applications, integrate Oracle Applications data with non-Oracle applications, and write custom reports for Oracle Applications products. Oracle eTRM is available on Metalink

Oracle Manufacturing APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Manufacturing.

Oracle Order Management Suite APIs and Open Interfaces Manual

This manual contains up-to-date information about integrating with other Oracle Manufacturing applications and with your other systems. This documentation includes APIs and open interfaces found in Oracle Order Management Suite.

Oracle Applications Message Reference Manual

This manual describes Oracle Applications messages. This manual is available in HTML format on the documentation CD-ROM for Release 11i.

Oracle CRM Application Foundation Implementation Guide

Many CRM products use components from CRM Application Foundation. Use this guide to correctly implement CRM Application Foundation.

Training and Support

Training

Oracle offers training courses to help you and your staff master ***Oracle Customer Care*** and reach full productivity quickly. You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization's structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep ***Oracle Customer Care*** working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8*i* server, and your hardware and software environment.

Oracle*MetaLink*

Oracle*MetaLink* is your self-service support connection with web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracle*MetaLink*, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at (http://metalink.oracle.com).

Alerts: You should check Oracle*MetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

Self-Service Toolkit: You may also find information by navigating to the Self-Service Toolkit page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade.

Do Not Use Database Tools to Modify Oracle Applications Data

Oracle STRONGLY RECOMMENDS that you never use SQL*Plus, Oracle Data Browser, database triggers, or any other tool to modify Oracle Applications data unless otherwise instructed.

Oracle provides powerful tools you can use to create, store, change, retrieve, and maintain information in an Oracle database. But if you use Oracle tools such as SQL*Plus to modify Oracle Applications data, you risk destroying the integrity of your data and you lose the ability to audit changes to your data.

Because Oracle Applications tables are interrelated, any change you make using Oracle Applications can update many tables at once. But when you modify Oracle Applications data using anything other than Oracle Applications, you may change a row in one table without making corresponding changes in related tables. If your tables get out of synchronization with each other, you risk retrieving erroneous information and you risk unpredictable results throughout Oracle Applications.

When you use Oracle Applications to modify your data, Oracle Applications automatically checks that your changes are valid. Oracle Applications also keeps track of who changes information. If you enter information into database tables using database tools, you may store invalid information. You also lose the ability to track who has changed your information because SQL*Plus and other database tools do not keep a record of changes.

About Oracle

Oracle Corporation develops and markets an integrated line of software products for database management, applications development, decision support, and office automation, as well as Oracle Applications, an integrated suite of more than 160 software modules for financial management, supply chain management, manufacturing, project systems, human resources and customer relationship management.

Oracle products are available for mainframes, minicomputers, personal computers, network computers and personal digital assistants, allowing organizations to integrate different computers, different operating systems, different networks, and even different database management systems, into a single, unified computing and information resource.

Oracle is the world's leading supplier of software for information management, and the world's second largest software company. Oracle offers its database, tools, and applications products, along with related consulting, education, and support services, in over 145 countries around the world.

1

Introduction to Oracle Customer Care

This chapter provides an overview of the Oracle Service product family and Oracle Customer Care. A summary of new features and obsolete features is also discussed.

The following topics are covered:

- Oracle Customer Care Overview
- New in this Release
- Obsolete in this Release

1.1 Oracle Customer Care Overview

Oracle Customer Care provides a 360 degree view of the customer by displaying relevant information about the customer that is appropriate for the customer care agent to know. The agent can also manipulate customer data and create interactions with the customer.

Customer Care helps companies understand customers' needs, and then use this knowledge to provide service that exceeds customer expectations. It provides a means for better understanding and interacting with customers using readily available sales, order management, support, service, billing, repair history, tasks, and contract management information.

1.2 New in this Release

The following features of Customer Care are new in Release 11.5.6:

1.2.1 Enhanced Relationships tab

The 11.5.6 release leverages the relationships schema in the Trading Community Architecture (TCA) to allow creation of only meaningful relationships between two parties. There is a valid list for Business to Business (B2B) relationships as well as Business to Consumer (B2C) relationships. For instance, you can create a spouse relationship only in a B2C scenario.

1.2.2 Enhanced Addresses tab

The Addresses tab has been enhanced to make it more effective from a usability stand point. A key feature being introduced is the ability to choose from available locations to create a new address for a given party. This eliminates the duplication of data and reduces user effort. The layout has been redesigned to allow the user to create multiple address usage (such as Bill To, Ship To and Installed At) for a single address. The user can also view all the primary selections for each address usage. These improvements will vastly assist the user in quickly viewing, updating and creating address information. In addition, the user can associate contact points for a given customer address.

1.2.3 Enhanced Contact Points Tab

The Contact Points tab has been enhanced to provide ease of use and intuitive navigation. The user can view all the primary selections for each contact method. This improves user efficiency while interacting with the customer since all the critical information is available immediately.

1.2.4 Enhanced Tasks Tab

The functionality available in the Tasks tab has been enhanced to allow quick access to the CRM Foundation Task Manager window and the Notes window. Access to the Notes window allows the user to create or view important notes related to the task. A descriptive flexfield has also been added to the Task tab to provide greater flexibility.

1.2.5 Predefined Relationship Plan

Relationship Plans module now include "Expiring Contracts", a predefined Relationship Plan. The users will receive a message alert for any customer whose contract is expiring within 30 days, when that customer is queried on the Contact Center. This is an example of how the powerful tool of Relationship Plans can be used to proactively manage and provide the best care to customers.

1.2.6 Predefined Action Attributes for Contact Center

The relationship plans administrator can define complex conditions for relationship plans, using the new set of predefined action attributes. The conditions range from specifying a customer name or number to address attributes and phone numbers. This allows the relationship plans administrator to define relationships plans based on the business need. For example, if the administrator wants to warn all the call center agents about an outage in the 650 area code, a relationship plan can be created with that specific condition. For every customer calling from that specific area code, a message alert will be displayed to the call center agent, who can then advise the customer on the situation.

1.3 Obsolete in this Release

No features are obsolete in this release.

2

Implementing Customer Care

This chapter presents a detailed description of the setup and implementation steps required to successfully implement Customer Care.

This following topics are covered:

- Running the Relationship Plan Assignment Engine
- Setting Up Quick Menu
- Setting up Address Flexfields
- Defining Profile Options
- Linking Outcome, Result and Reason Codes for Interaction History
- Setting Up Customer and Account Numbering

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

2.1 Setting Up Customer Profiles

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

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

> **Note:** Customer Profiles are not the same as System Profiles. System profile options are described in Defining Profile Options

The Customer Profile module provides the following 38 predefined profile checks:

- Open Service Request
- Escalated Service Requests
- Open Tasks
- Approved Tasks
- Cancelled Tasks
- Rejected Tasks
- Accepted Tasks

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

- Do Not Fax
- Date of Birth
- Expiring Contracts (added in 11.5.6)

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

Follow these steps to setup Customer Profiles:

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

2.1.1 Defining Profile Ratings

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

Profile rating codes are implemented in Customer Care by the usage of standard Oracle Applications lookup codes. Lookup codes use one of three access levels:

- User - No seeded values are supplied. Additional values can be added.
- Extensible - Seeded values are supplied. Additional values can be added.
- System - Seeded values are supplied. No additional values can be added.

Profile rating codes are implemented with the User Access Level.

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

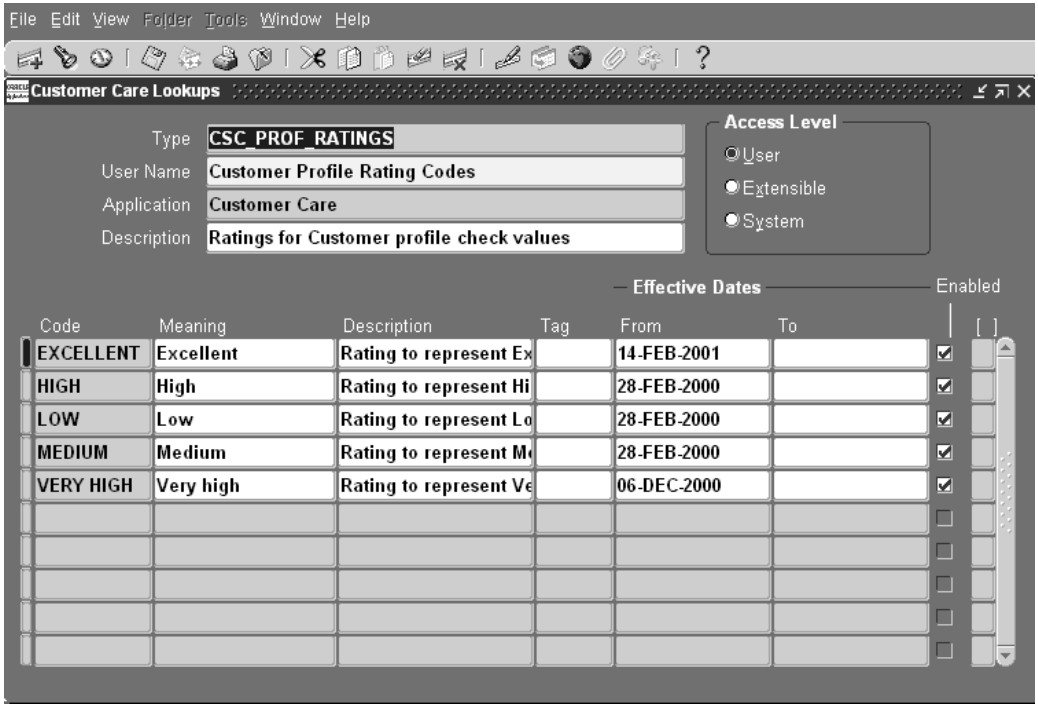
Prerequisite

None

To define profile ratings:

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

   Setup > Customer Care Lookups



2. Open Customer Profile Rating Codes by running a query on the Type of CSC_PROF_RATINGS. Three predefined ratings—High, Medium and Low—are predefined in the module. You may create new rating codes.

3. To create a new rating code, click the New button on the toolbar.
4. Navigate to the new record and enter a name for the rating code in the Name field.
5. Enter a value in the Code fields.
6. Enter a value in the Meaning field.
7. Optionally enter a description in the Description field.
8. The Tag field is not used.
9. Optionally enter dates in the Effective Date fields.
10. Verify that the Enabled check box is selected.
11. Save your work.

See Also:

- Defining Profile Variables
- Defining Profile Checks

2.1.2 Defining Rating Labels

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

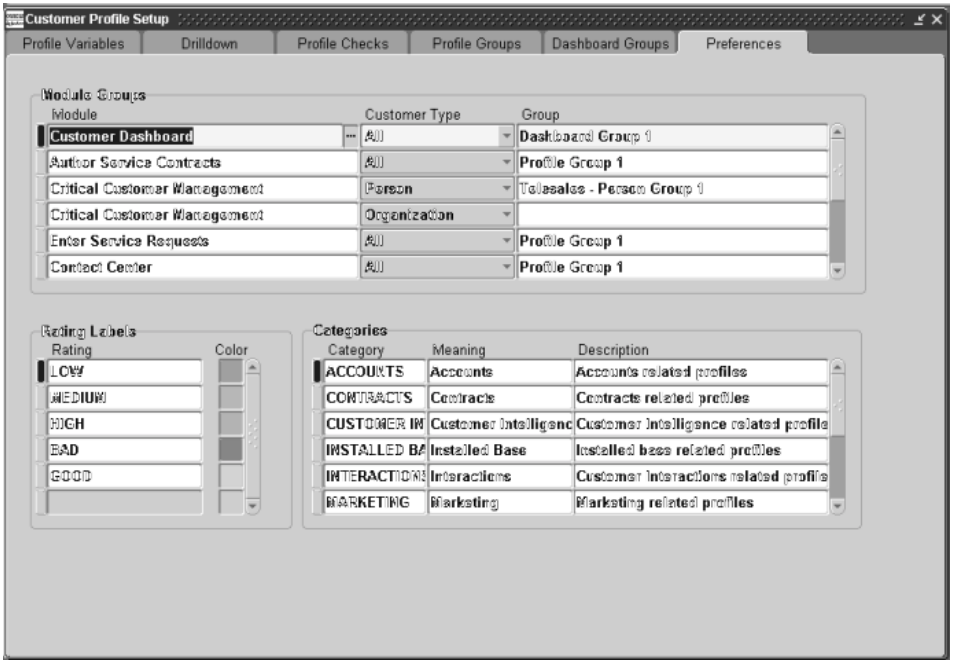
Prerequisite

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

To define rating labels:

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

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



2.1.3 Defining Categories

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

Prerequisite

None

To define categories

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

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

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

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

2.1.4 Defining Profile Variables

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

SQL statements can contain two bind variables:

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

No other bind variables are supported.

Your SQL statement must be constructed so that only a single row is returned by the query.

For a detailed description of the database objects that are available for selection in a SQL statement, refer to the Electronic Technical Reference Manual (eTRM) for Customer Care that is available from http://metalink.oracle.com. Navigate to Technical Libraries and use the link titled Applications Electronic Technical Reference Manuals. Customer Care database objects are stored in the folder named CSC.

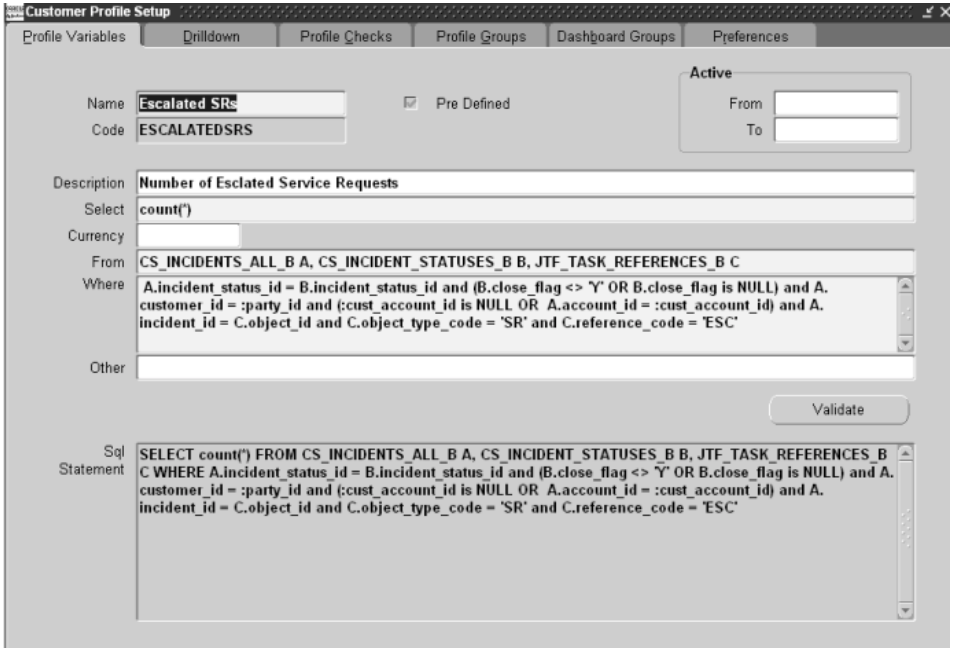
Prerequisite

None

To define a profile variable:

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

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



2. Click the New button on the toolbar.
3. Enter a value in the Name field.
4. The Code field reflects the name you enter in the Name field. You can substitute the value in the Code field with another unique value.
5. Optionally enter dates in the Active: From and Active: To fields.
6. Optionally enter a description of the profile variable in the Description field.
7. Enter the appropriate components of the SQL statement in the following fields:
   - Select (mandatory field).
   - Currency (optional field).
   - From (mandatory field).
   - Where (mandatory field).
   - Other (optional, used for including clauses such as Group By).
8. To validate the SQL statement, click **Validate**.

9. Save the profile variable. When you save the profile variable, the SQL statement is validated. You cannot save an invalid SQL statement.

See Also:

- Setting up Customer Profile
- Defining Profile Ratings
- Defining Profile Checks
- Defining Profile Groups

2.1.5 Defining Drilldowns

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

For a detailed description of the database objects that are available for selection in a SQL statement, refer to the Electronic Technical Reference Manual (eTRM) for Customer Care that is available from http://metalink.oracle.com. Navigate to Technical Libraries and use the link titled Applications Electronic Technical Reference Manuals. Customer Care database objects are stored in the folder named CSC.

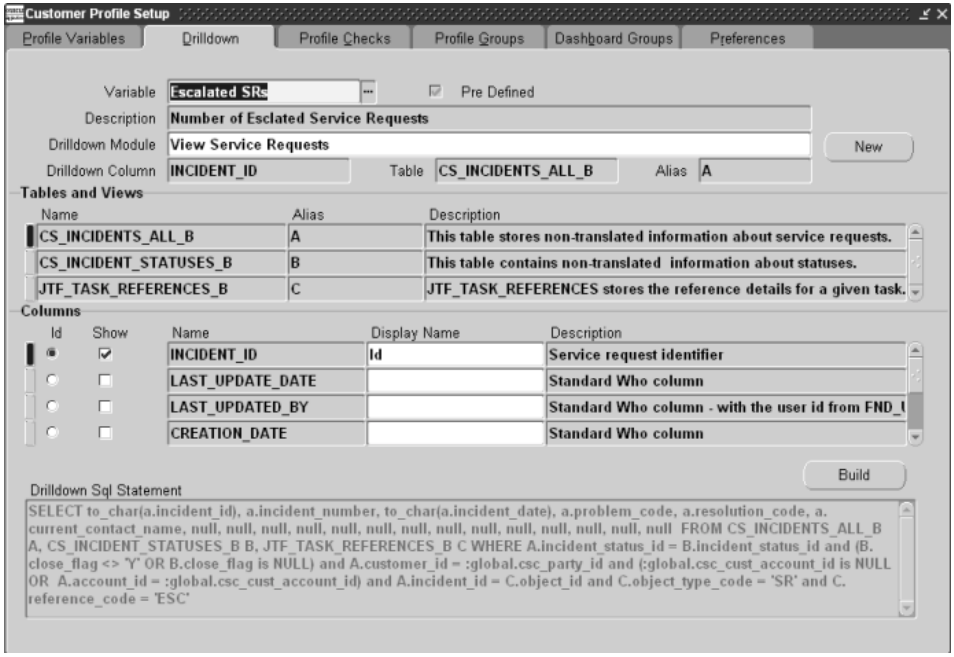
Prerequisite

Profile Variables must exist.

To define the first level of drilldown:

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

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



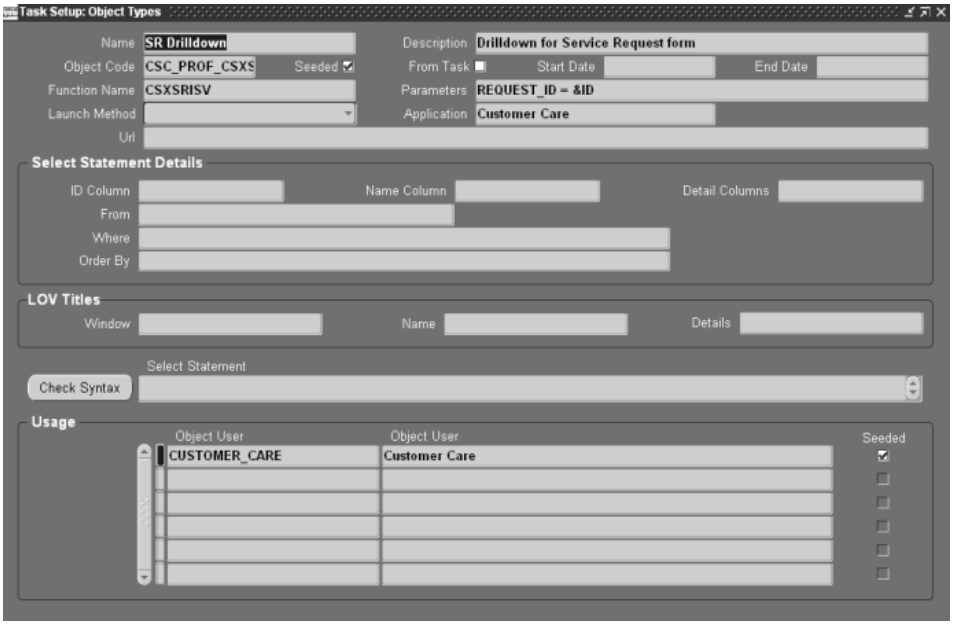
2. From the Variable field, select the profile variable for which you want to define the drilldown. The Description field as well as the Tables and Views section display relevant information on the selected profile variable.
3. In the Columns section, enter a user-friendly name for the column in the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

Prerequisite

You must define the first level of drilldown before you define the second level of drilldown.

To define the second level of drilldown:

1. Without exiting the Drilldown tab, go to the Drilldown Module field and select the module which is to be linked to the profile variable.
2. If the required drilldown module is not available in the list of values for the Drilldown field, you can define a new one. Follow these steps to create a drilldown module:
   a. Click **New**.
   b. The Task Setup: Object Types window opens.



   c. Enter a name for the drilldown module in the Name field.
   d. Enter a description for the drilldown module in the Description filed.
   e. Enter a value in the Object Code field that begins with 'CSC_PROF'. An example is CSC_PROF_CSXSRISV.
   f. Enter the Function Name, such as CSXSRISV.
   g. Enter the parameters.
   h. Select Customer Care from the Application Name list of values.

i. The Usage region is optional. You can select CUSTOMER_CARE from the list of values, which also populates the Object User field. The Seeded check box indicates whether the module is predefined.

j. Save your changes.

k. Close the form to return to the Drilldown tab.

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

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

4. In the Columns section, select one column as the ID column using the Id radio button. This is the column which allows the drilldown to the transaction screen. For example, if service request number is defined as the ID drilldown column, double clicking on the service request number in the summary list of the transactions opens the Service Request window containing the details of the service request. **Note:** Only one ID column can be present for a profile variable.

5. Save your changes. Close the form.

Note: Please use registered tables or views only. Column names are retrieved from FND_COLUMNS and FND_VIEWS. If the columns are not visible to you, check to see if the table or view is registered.

See Also:

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

2.1.6 Defining Profile Checks

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

Note: Do not modify seed data. Seed data is provided for you to use as it is delivered. If you want to modify the setup of seed data, make a copy of the seed data and modify your copy.

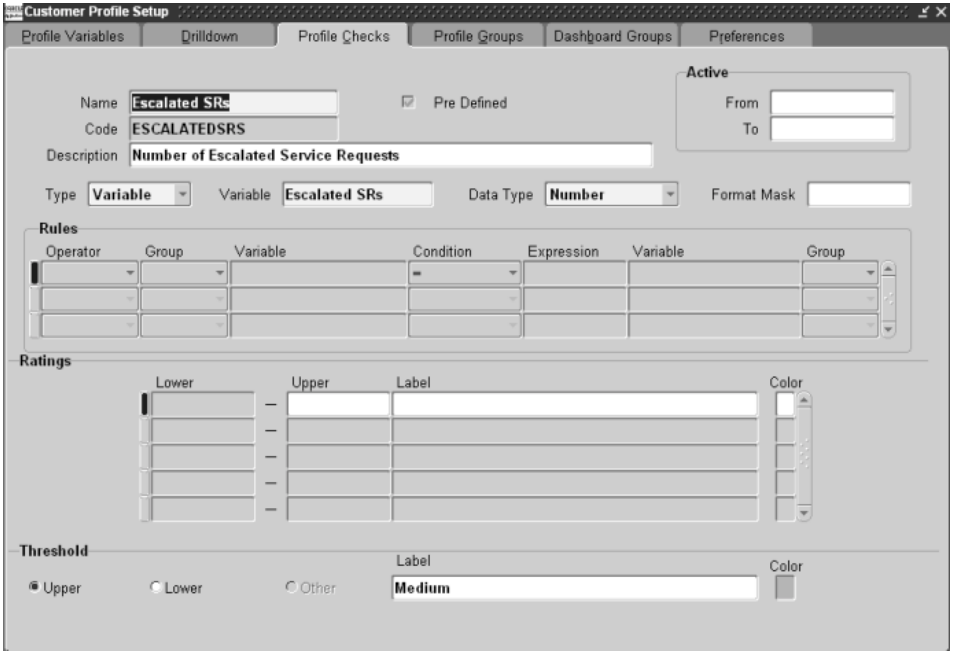
Prerequisite

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

To define profile checks:

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

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



2. Enter a name for the profile check in the Name field.
3. The Code field defaults to the name you enter in the Name field. You can substitute the value in the Code field with another unique value.
4. Enter a description for the profile check in the Description field.

5. Enter the date when the profile check is to be in force by specifying the Active From and Active To fields.

6. In the Type field, select the profile check type you want to create. The choices are **Variable** and **Yes or No**.

   If you select the Variable Type, you can define a rating for the profile check, which includes defining ranges, colors and labels. If you select the Yes or No Type, you cannot associate ranges, colors and labels to the profile check. Instead, the name of the profile check is displayed on the Dashboard tab with the letter Y or N next to the profile check name.

7. In the Variable field, select the variable on which the profile check is to be based.

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

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

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

11. If needed, in the Threshold region, set the threshold for the rating and select a label. To define the threshold for the current rating, click the Upper or Lower radio button.

    As an example, assume that the following values are defined in the Rating region of the Profile Checks window:

Lower Value	Upper Value	Label
5	10	Low
11	20	Medium
21	30	High

    Assume that you want to display a profile check when the value exceeds the upper limit of the Medium range. To do this, you must click the Upper button and select Medium from the Label list of values. This means that if the value of this check exceeds 20 then the check is displayed when viewing the profile or dashboard. This information is displayed only if you enable the Display on Threshold check box when you define the Profile Group. Refer to Defining Profile Groups for more information.

12. Save the profile check you have defined.

To define Boolean profile checks:

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

See Also:

- Defining Profile Ratings
- Defining Profile Variables

2.1.7 Defining Profile Groups

A profile group is a logical grouping of profile checks. The group can be associated with a module to indicate the check values and the order in which they are displayed when viewing the profile from that form.

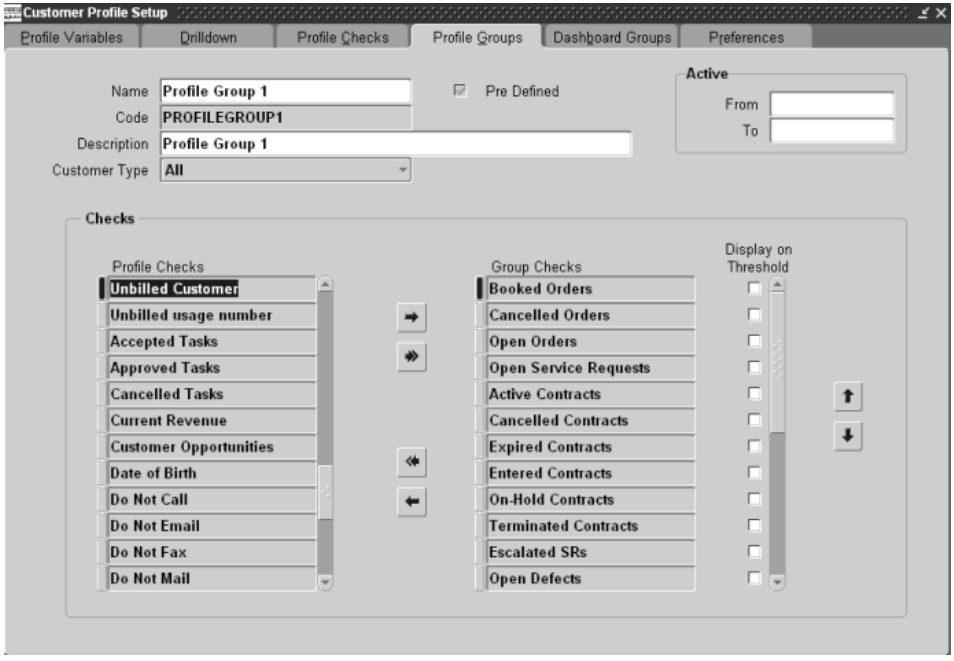
Prerequisite

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

To define profile groups:

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

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



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

   If you select the All customer type, the Person and Organization Customer Types are not used. The All customer type is designed for use when you do not want to target your customer base with respect to B2B and B2C.

7. You can enter dates in the Active From and Active To fields to limit the period that the profile group can be applied.
8. In the Checks section, follow these steps:
   a. Select the appropriate profile check from the Profile Checks column and move it to the Group Checks column. Use the right and left arrow buttons to move the profile checks between the columns. Use the up arrow and down arrow buttons to move the selected group check up or down in the list.
   b. Select the Display on Threshold check box if you want the check to be displayed only when the threshold level has been crossed. For example, if the upper limit of Open Service Requests is 20 and the customer opens their 21st service request, the profile check will appear in the dashboard. If you want to display a profile only when a threshold is crossed, you must have a threshold defined for this profile check. See Defining Profile Checks for additional information.
9. Save the Profile group.

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

See Also:

- Defining Profile Ratings
- Defining Profile Variables
- Defining Drilldowns
- Defining Profile Checks
- Defining Dashboard Groups
- Defining Rating Labels
- Defining Categories

2.1.8 Defining Dashboard Groups

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

Prerequisite

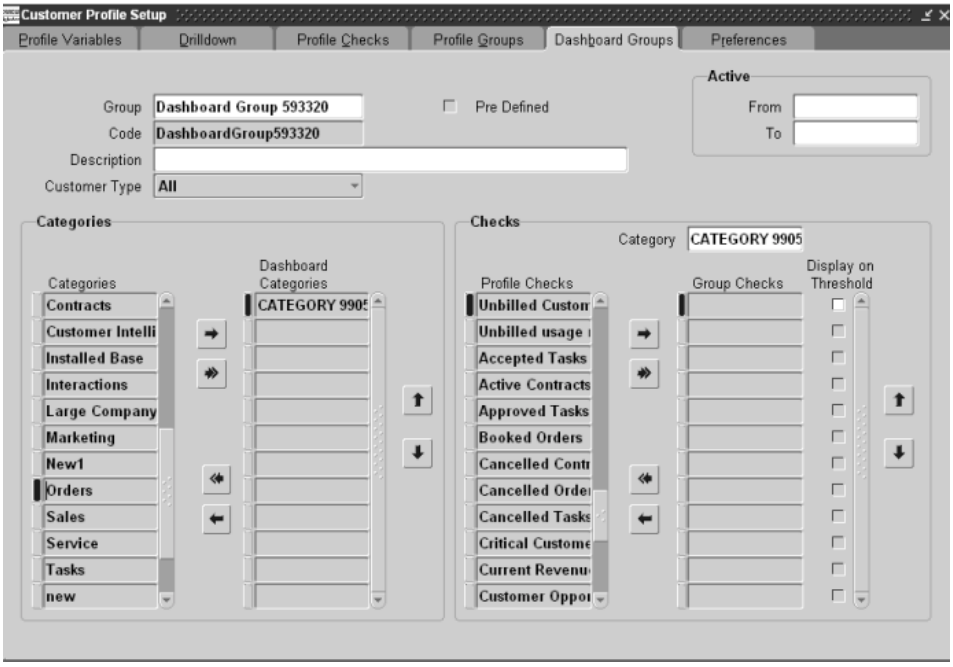
- You must define Profile Checks before you define Dashboard groups.

- You must define Categories before you define Dashboard groups.

To define dashboard groups:

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

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



2. Enter a name for the Dashboard Group in the Group field.
3. The Code field defaults based on the value you entered in the Group field.
4. Enter a description for the Dashboard Group in the Description field.
5. In the Customer Type field, select the customer type you want to associate with the dashboard group. You can select Person, Organization, or All as the customer type. For example, you can create Dashboard Group A for Organizations and Dashboard Group B for Persons. If a caller calls on behalf of an organization in a B2B scenario, then Dashboard Group A displays. If a caller calls on behalf of himself in a B2C scenario, then Dashboard Group B is displayed.

If you select the All customer type, the Person and Organization Customer Types are not used. The All customer type is designed for use when you do not want to target your customer base with respect to B2B and B2C.

6. You can enter dates in the Active From and Active To fields to limit the period that the dashboard group can be applied.

7. In the Categories section, select the categories for the Dashboard Category. To do this, move the categories you want to include in the dashboard from the Category column to the Dashboard Categories column.

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

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

8. Save your changes. If you do not save your changes, then your dashboard categories will not be available in the next step.

9. In the Category field in the Checks section, select the category for which group checks are to be defined. Use the right and left arrow buttons to move the profile checks between the columns labeled Profile Checks and Group Checks. Use the up arrow and down arrow buttons to move the selected group check up or down in the list. This sequence determines the display sequence on the Dashboard tab of the Contact Center.

10. Select the Display on Threshold check box if you want the check to be displayed only when the threshold level has been crossed. For example, if the upper limit of your threshold is 20 and this threshold is crossed, the profile check will appear in the dashboard. If you want to display a profile only when a threshold is crossed, you must have a threshold defined for this profile check.

11. Save your dashboard group.

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

See Also:

- Defining Profile Variables
- Defining Profile Checks

- Defining Profile Groups
- Defining Categories

2.1.9 Associating Profiles with Modules

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

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

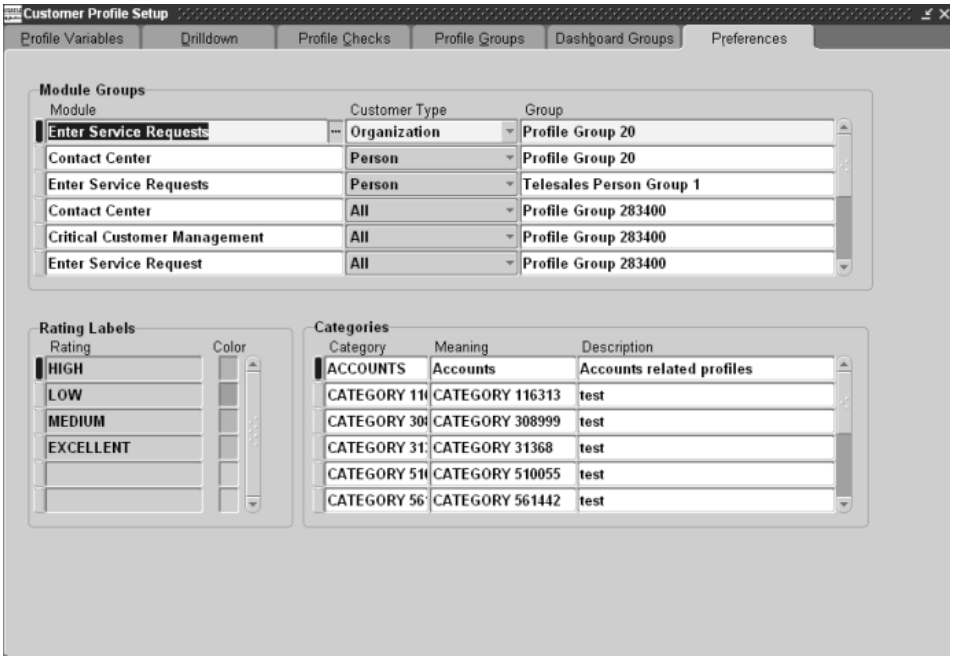
Prerequisite

None

To associate profiles with modules:

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

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



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

2.2 Running the Customer Profile Engine

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

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

The Customer Profile Engine should be run for the following purposes:

- Retrieve profile values for new customers.
- Retrieve the latest profile values for all customers.
- Reflect changes made to the profile setup.
- Retrieve values for new profiles.

The Customer Profile Engine can be run in two ways:

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

The parameters for running Customer Profile Engine are Party Name and Group Name and a list of values is available for both parameters. The Account parameter is no longer supported.

2.3 Setting Up Relationship Plans

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

Follow these steps to setup Relationship Plans:

- Prerequisite Steps
  - Define Plan Groups (optional step)
  - Define Actions
  - Define Process Definitions for Outcomes

- Define Messages

- Setting up Relationship Plans
  - Define Relationship Plans
  - Add or Modify Relationship Plan Condition Lines
  - Enable Relationship Plans
  - Run the Relationship Plan Assignment Engine

2.3.1 Defining Plan Groups

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

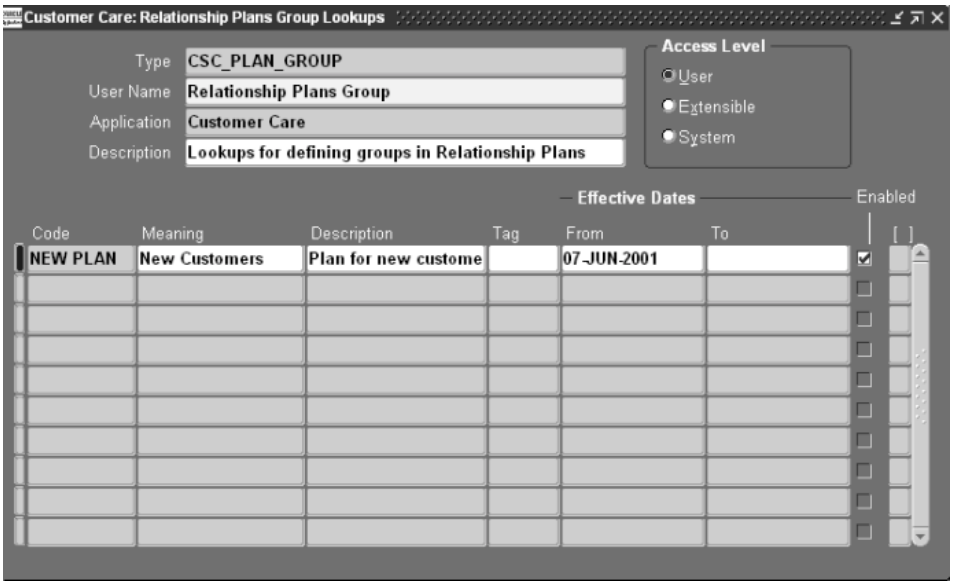
Prerequisite

None

To define Plan Groups:

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

   Setup > Relationship Plans > Define Plan Groups



2. Add a row. In the new row, enter a value in Code field.
3. Enter a value in the Meaning field.
4. Enter a value in the Description.
5. The Tag field is not used in Customer Care.
6. Optionally enter dates in the From and To fields.
7. Save your plan group.

See Also:

Defining Relationship Plans

2.3.2 Defining an Action

You must define an action before it can be used to define condition lines for a relationship plan. Customer Care provides one predefined action called Customer Care - Generic Action which includes attributes that represent all fields in the Contact Center header region. Refer to Appendix B for a detailed list of the attributes available for this predefined action.

When you define a condition line for a relationship plan, each condition must have a unique action attached to it.

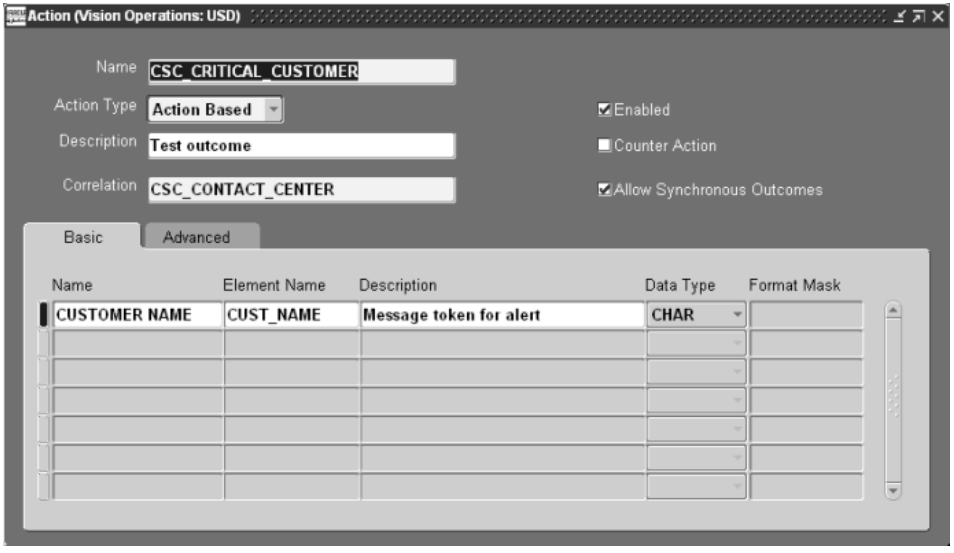
Prerequisite

None

To define an action:

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

   Setup > Relationship Plans > Events > Define Action



2. Enter the name of your action in the Name field.
3. Select only Action Based in the Action Type field. Date Based is not supported for this release.
4. Optionally enter a description of your action in the Description field.
5. Enter a value in the Correlation field that begins with 'CSC_' to correlate your action to Customer Care.
6. Select the Enabled check box to make this action available for use.

7. Select the Allow Synchronous Outcomes check box to allow a real-time alert or script to pop up in the Contact Center when the Relationship Plan is expiring, for example.
8. In the Basic tab, enter a name to describe the Element to be used in the action attribute.
9. There are several seeded action attributes that can be used as the Element Name in the Action. This same attribute name must be used in the Process Definition and the Message Definition. Refer to Appendix B for a complete list of the seeded action attributes.

Note: Do not modify seed data. Seed data is provided for you to use as it is delivered. If you want to modify the setup of seed data, make a copy of the seed data and modify your copy.

10. Optionally enter a description in the Description field.
11. Select a data type of CHAR, NUMBER, or DATE in the Data Type field.
12. Select a format mask, if appropriate.
13. Save your action.

See Also:

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

2.3.3 Defining Process Definitions for Outcomes

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

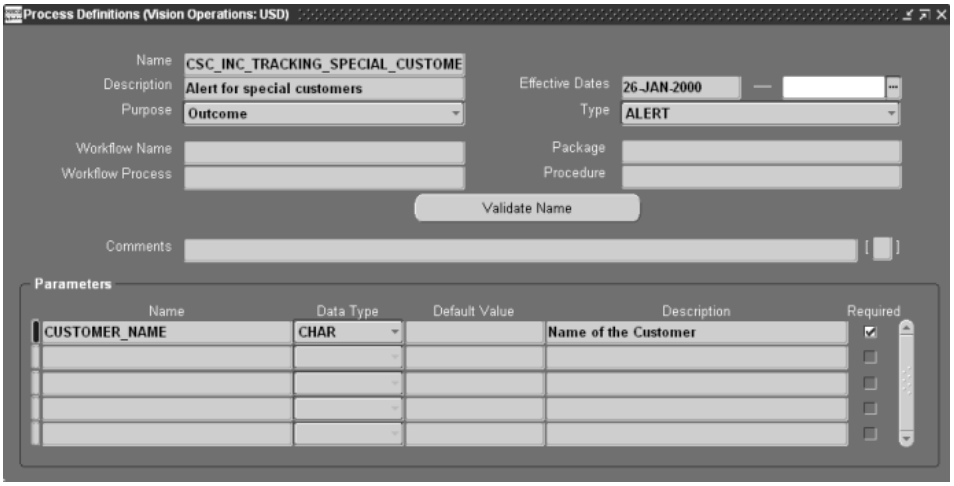
Prerequisite

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

To define process definitions:

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

Setup > Relationship Plans > Events > Define Process Definitions



2. Enter a name for the process in the Name field. If you are defining an Alert process, the name of the process must be the same as the Message Name. See Defining Messages for more information.
3. Optionally enter a description in the Description field.
4. Select a value of Outcome in the Purpose field. Selecting any other value has no significance for relationship plans.
5. Select either Alert, Script, PLSQL or Workflow in the Type field. If you select Workflow, enter the Workflow Name and Workflow Process. If you select PLSQL, enter the name of the Package and Procedure. If you select Alert, you must define a message and the message must have the same name as the Alert. See Defining Messages for more information.
6. Optionally enter comments in the Comments field.
7. You can validate the name of the Workflow process or the PLSQL package by clicking **Validate Name**.
8. In the Parameters section, enter a value in the Name field that is the same value you used as the Element Name in your Action definition.
9. The Data Type field defaults to the data type of the Element Name and Name mentioned in the previous step.

10. Optionally enter values in the Default Value and Description fields that are of the same data type as just entered in the Data Type field.

11. Save your process definition. For additional information about defining process definitions, refer to Understanding Events in *Oracle Contracts Core Concepts and Procedures*.

See Also:

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

2.3.4 Defining Messages

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

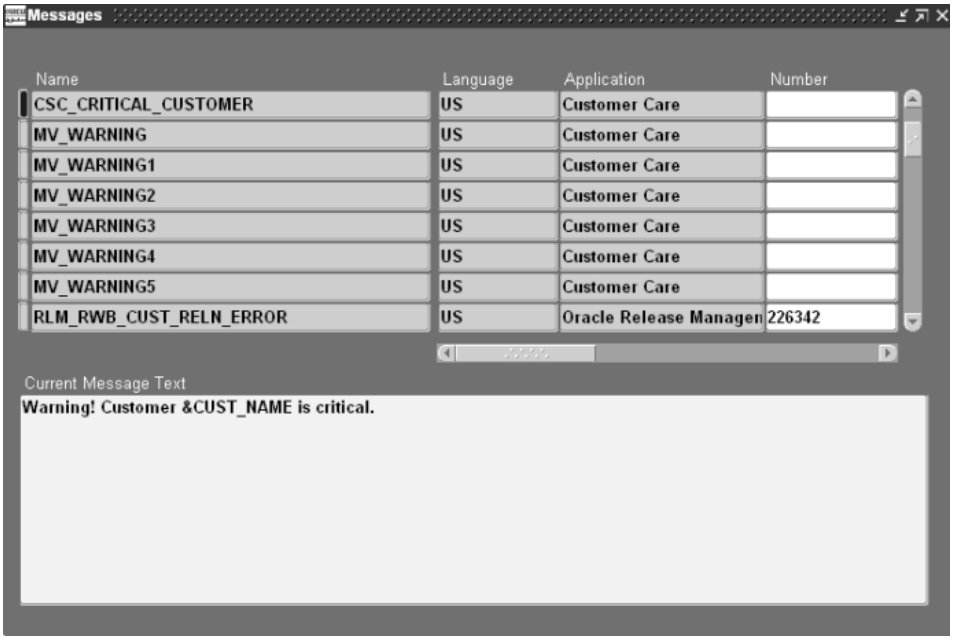
Prerequisite

None

To define messages:

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

   Application > Messages



2. Enter a name for your message in the Name field. If you are defining a message to be used with an Alert process, the name of the message must be the same as the name of the process.
3. Select a language from the Language list of values.
4. Select Customer Care from the Application list of values. If you select any other application, your message will not appear in the Contact Center.
5. The remaining fields, Number, Type, Maximum Length and Description, are optional fields.
6. In the Current Message Text field, enter the message that you wish to display as a real-time alert. If you want to use a token, such as Customer Name, in the message, the token name must be the same name as the parameter used in the Process Definition. This is the same name as the Element Name defined in the Action.
7. Save your message.

2.3.5 Defining Relationship Plans

Customer Care provides one predefined relationship plan. The plan name is Expiring Contracts and its function is to display an alert when querying a customer who has one or more contracts that will expire in the next 30 calendar days. This relationship plan uses the profile check called Expiring Contracts. Refer to Appendix B for more details about the predefined relationship plan.

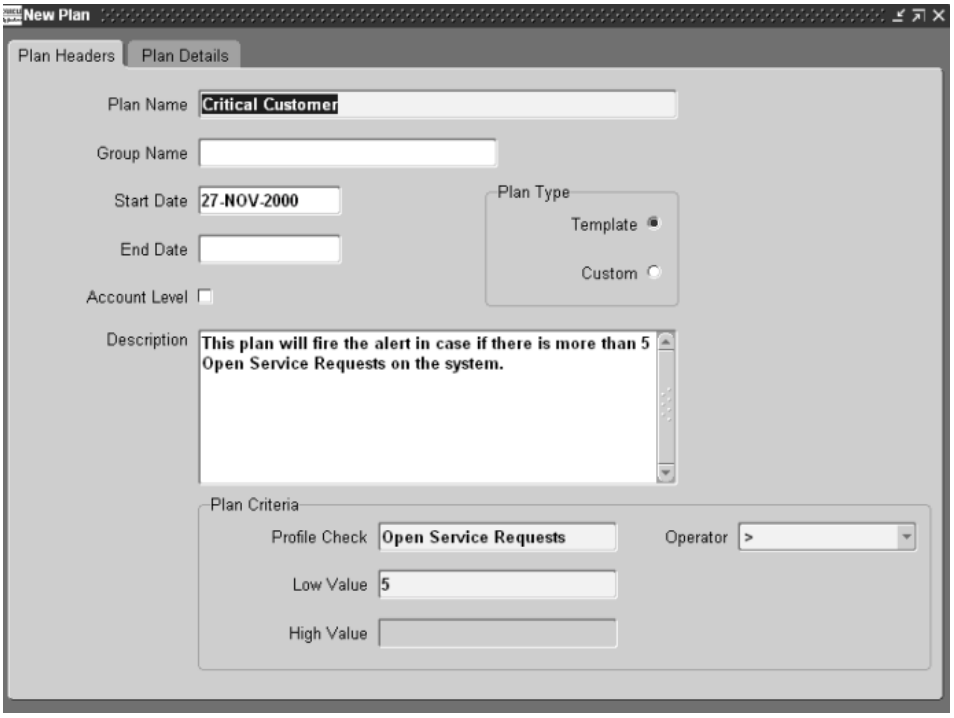
Prerequisites

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

To define relationship plans:

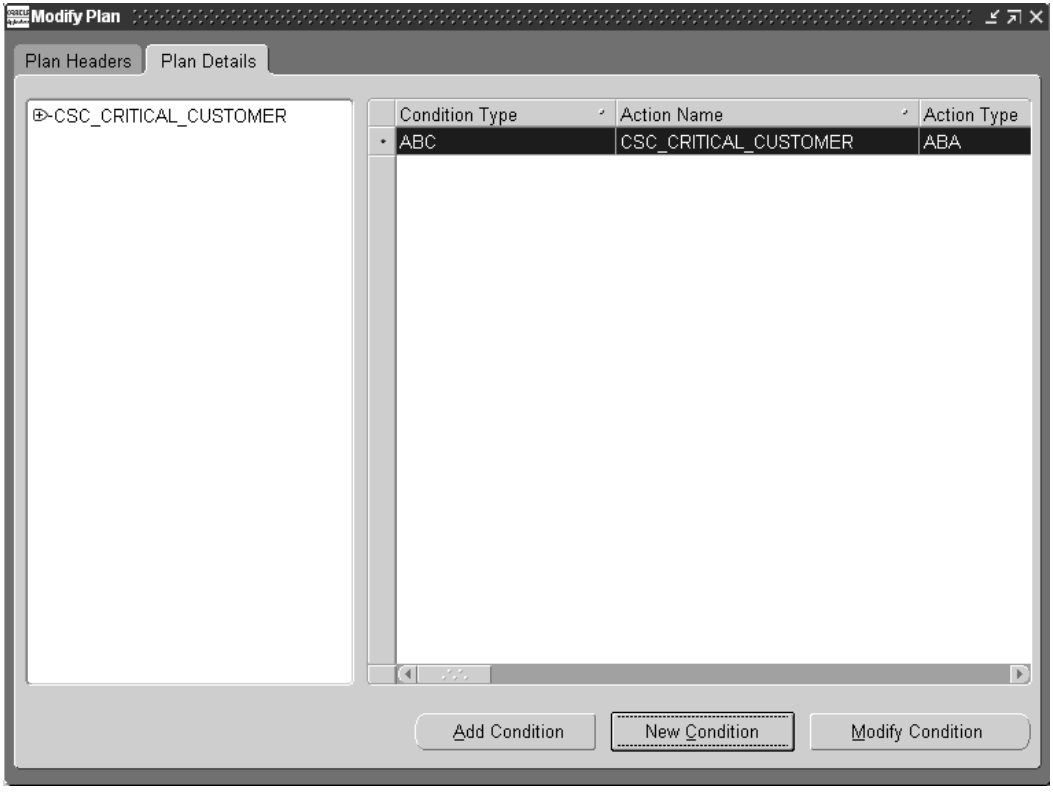
1. Open the New Plan window using the following navigation path:

   Setup > Relationship Plans > Define Relationship Plans

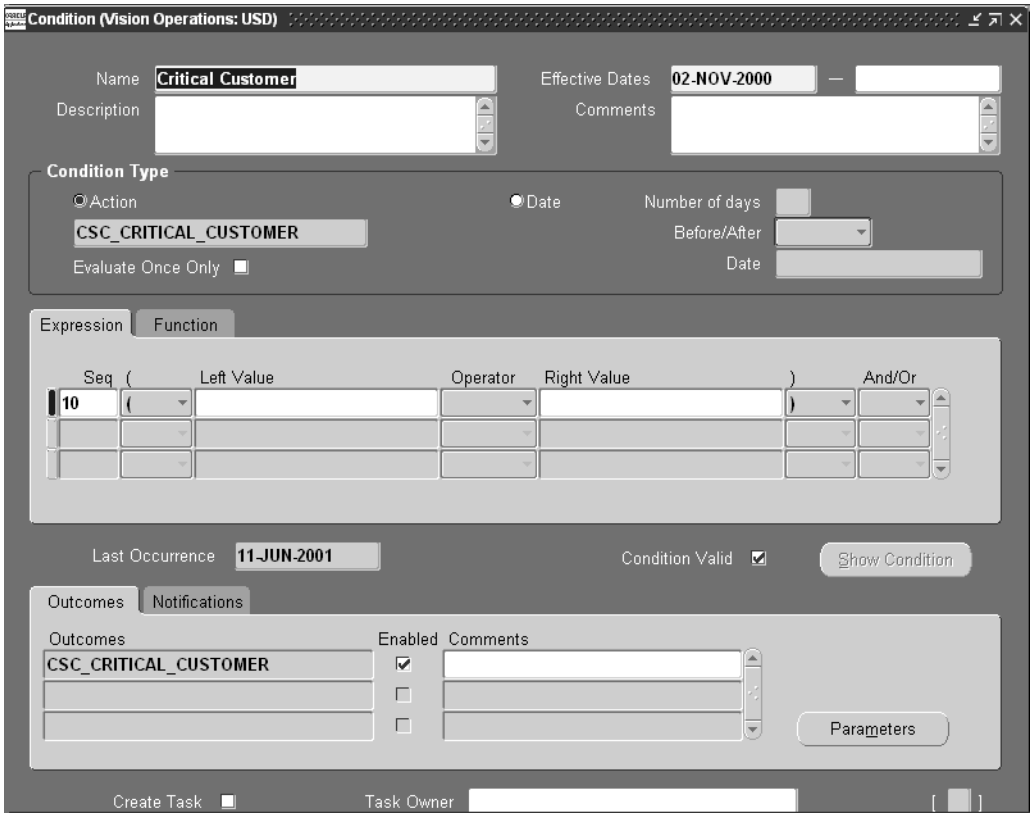


2. In the Plan Header tab, enter a name for the plan in the Name field.
3. Optionally select a group name from the Group Name list of values if you previously defined plan groups.
4. Optionally enter start and end dates for this relationship plan.
5. Select the Account Level check box if you want to create a plan that is valid at the account level. If you do not select the Account Level check box, the plan is targeted at the party level. An example of the usage of an account level relationship plan would be the creation of a specific relationship plan for a customer that generates a significant amount of revenue.
6. All relationship plans are initially created from a template, so the Template radio button is selected by default in the Plan Type section. The Custom radio button can be used only from the Inquiry tab when you customize a relationship plan for one specific customer.
7. Enter a description of the Relationship Plan in the Description field.

8. In the Plan Criteria section, you define the criteria to be used by the Relationship Plan Assignment Engine to determine associations between customers and relationship plans. Select a profile check from the Profile Check list of values. The values in the list are dependent on the profile checks you previously defined.
9. Select an operator from the Operator list of values. The choices are =, <, >, >=. <=, Between, and Not Between.
10. Enter a low value in the Low Value field.
11. Enter a high value if you previously selected an operator value of Between or Not Between.
12. Save your relationship plan.
13. Open the Plan Details tab.



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



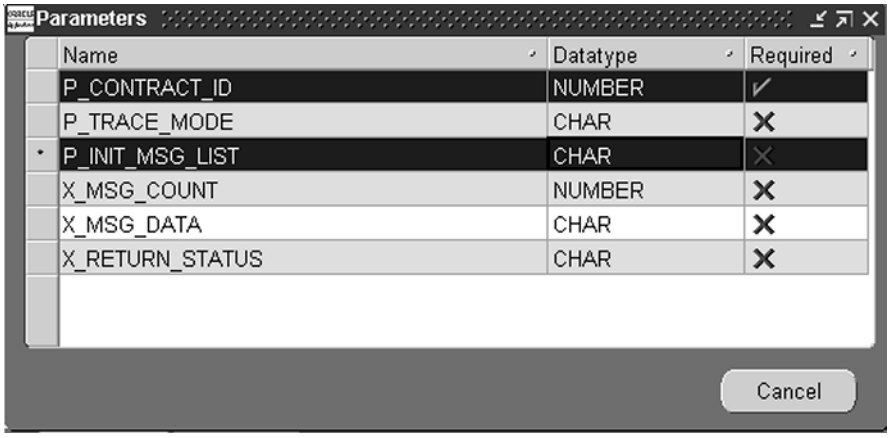
15. Enter the name for your condition in the Name field.
16. Optionally enter effective dates for your condition.
17. Optionally enter a description of your condition in the Description field.
18. Optionally enter comments about your condition in the Comments field.
19. In the Condition Type region,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

relationship plan. Only action attributes can be used to create condition lines.

21. The Evaluate Only Once check box is used if you want your condition to apply only once.

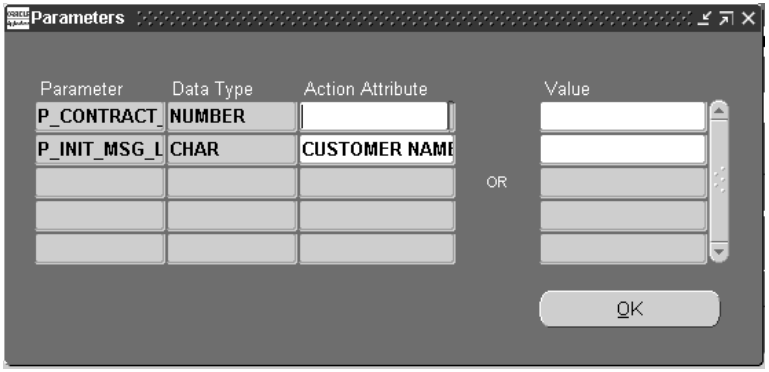
22. In the Outcomes region, select an outcome. Outcomes are defined as explained in the Defining Process Definitions for Outcomes section. Note that outcomes can be real time, such as alerts / scripts, or they can run in the background, such as tasks or workflow processes.

23. Click **Parameters** to open the Parameters window.



24. Select the appropriate parameter line. Right-click to open the canvas menu.

25. Choose the Populate selected rows in PARAMETERS option. The following screen should be displayed.



26. Select an action attribute from the Action Attribute list of values.
27. Click **OK**.
28. Save the conditions and close the Conditions window if you have no other conditions to enter.

See Also:

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

2.3.6 Adding or Modifying Relationship Plan Condition Lines

Prerequisites

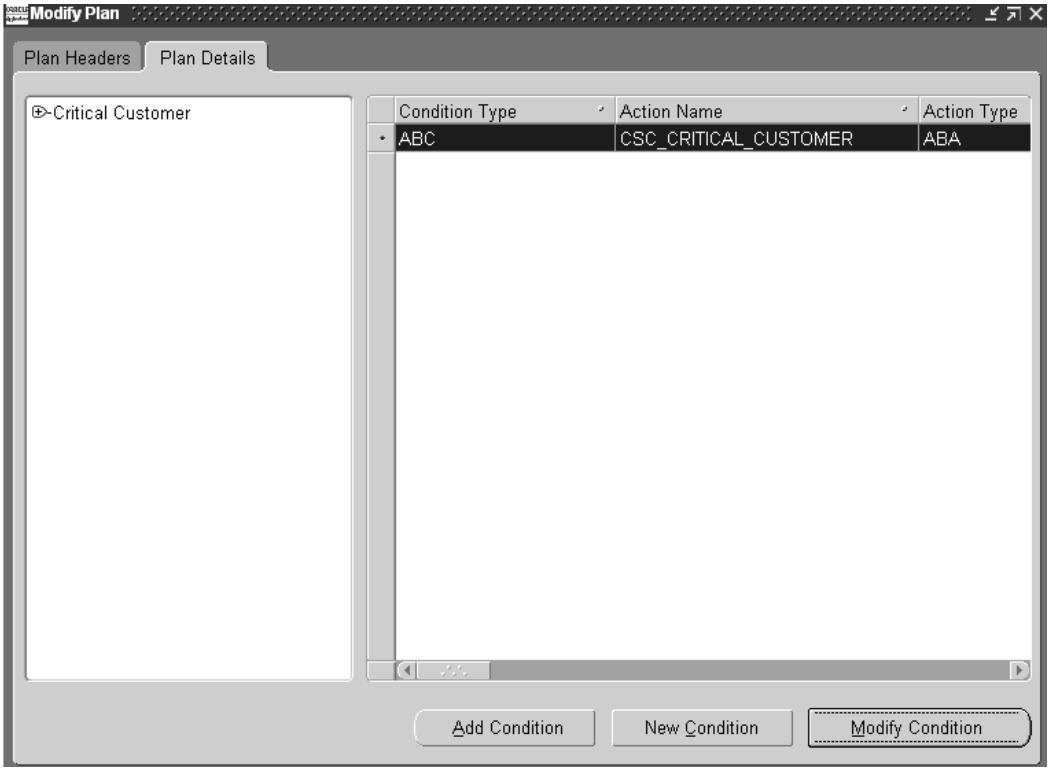
- You may optionally define Plan Groups.
- You must define Actions.
- You must define Process Definitions.
- You must define Messages if you want to use an Alert process.
- You must define a workflow if you want to use a Workflow process.

- You must define a PLSQL procedure if you want to use a PLSQL process.
- You must define a Script if you want to use a Script process.
- You must define Relationship Plan headers.

To add or modify condition lines on a relationship plan:

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

   Setup > Relationship Plans > Define Relationship Plans



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

6. Click **Modify Condition** in the Plan Details window.
7. Make the necessary changes to the condition line or outcome.
8. Save the modified condition line.

See Also:

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

2.3.7 Enabling Relationship Plans

Two forms are integrated with Relationship Plans - Contact Center and Enter Service Requests. The Contact Center and the Service Request forms are using the Custom1 trigger which fires on query. If you do not enable one or both of these forms in this step, the Relationship Plan Assignment Engine will ignore the form.

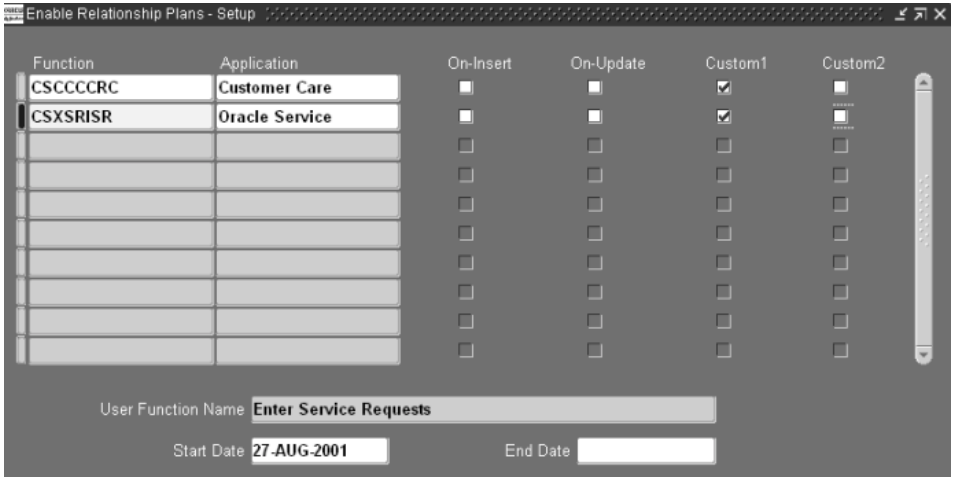
Prerequisite

None

To enable relationship plans:

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

   Setup > Relationship Plans > Enable Relationship Plans



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

   a. CSCCCCRC for the Contact Center form

   b. CSXSRIXSR for the Service Request form: fires on Custom1 trigger

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

3. The On-Insert trigger fires when a row is inserted. The On-Update trigger fires when a row is updated.

4. Optionally enter the Start and End dates.

5. Save the settings you have specified.

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

See Also:

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

- Adding or Modifying Relationship Plan Condition Lines

2.4 Running the Relationship Plan Assignment Engine

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

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

The following parameters are available for running the Relationship Plan Assignment Engine:

- Plan Name
- Check Name
- Party Name
- Account Name

Each parameter provides a list of values from which to choose. If a value is entered in the Party Name parameter, the Account Name list of values contains only those values for the selected Party Name. If no Party Name is selected, the Account Name list of values displays all accounts.

You can initiate the Relationship Plan Assignment Engine in two ways. First, you can run it as a concurrent program. Secondly, the program is run automatically whenever the customer profiles are updated by the Customer Profile Engine. Customer profiles can be updated by running the Customer Profile Engine as a concurrent program or by selecting the Refresh on the Dashboard tab.

2.5 Setting Up Quick Menu

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

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

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

You can also configure the Quick Menu to meet specific needs.

2.5.1 Viewing System Profile Values

To view the profile values:

1. Open the System Profile Values window from the navigator.
2. Query on the profile name called Start Menu in Quickmenu.
3. The default value is Quick Menu for Customer Support.

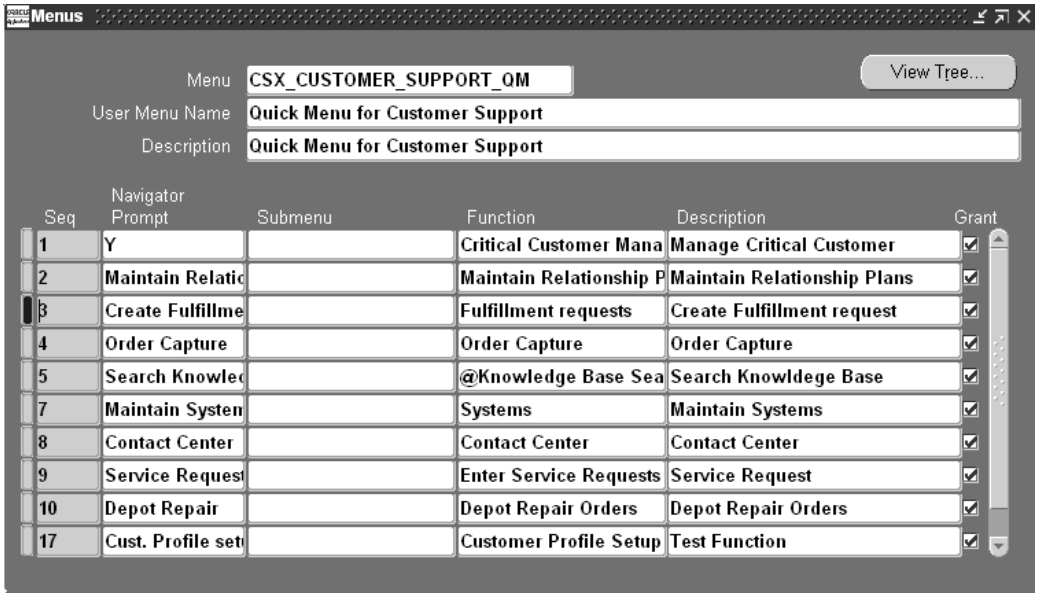
2.5.2 Verifying AOL Menu for Quick Menu

To verify an AOL menu for quick menu:

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

   Application—>Menu

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



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

2.5.3 Configuring the Quick Menu

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

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

2.6 Setting Up Address Flexfields

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

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

   Note: This was previously referred to as 'Remit Address'. For the new customer model, the flexfield has been changed to 'Remit Address HZ'.
4. Note the value in the Title field.
5. Close this window.
6. Navigate to the Segments form: Flexfields >Descriptive >Segments.
7. Query the record for the address flexfield by entering the value found in Step 4 for the Title field.
8. Uncheck the Freeze Flexfield Definition check box.
9. Create a new record in the Context Field Values to define an address style.
10. Enter a code, name and description for the style of address you want to define. For example, for United Kingdom, you can enter a Code of UK, a Name of UK, and a Description of United Kingdom.
11. Click **Segments** to open a new form for entering the different columns for that address style. For example, for UK you can specify the following columns: Address1, Address2, Address3, Town/City, County, Postal Code
12. You can click **Open** for each of these columns if you want to specify more attributes, for example whether the column is a required field or not.
13. Close this window.
14. In the Descriptive Flexfield Segments form check the Freeze Flexfield Definition check box.
15. Click **Compile** or **Save** to compile the flexfield definition and save your changes.
16. Close this window.
17. Navigate to the Applications > Lookups > Application Object Library form.

18. Query for the Lookup 'ADDRESS_STYLE' and ensure that the country you are adding exists as a lookup code for this lookup type.
19. If your country does not exist, then create an entry for the country you have included in the flexfield definition.
20. Close this window.
21. Change your responsibility to a Receivables responsibility.
22. Navigate to Setup > System > Countries
23. In this window, you can query for a country and specify the style of Address that you want this country to have. For example, you can query for United Kingdom in this form and in the Address Style, select the Address style that you previously defined for UK.

2.7 Defining Profile Options

System profile options help you control how Customer Care controls access to and processes data. During implementation, you set a value for each profile option at user, responsibility, application and site levels.

Site level profile settings apply to all users at an installation site. Application level profile settings apply to all the users of the specified application. Profile settings at application level override those set at site level. Responsibility level profile settings apply to all users who use the responsibility to sign on to the application. Responsibility level profile options override those set at site and application level. User level profile options apply to individual users identified by their application user names. User level profile options override all other profile options.

The following Customer Care system profile options must be set up unless otherwise noted. You must use the System Administrator responsibility to set up profile values. For a detailed explanation of system profile options and the procedures for setting them up, please refer to *Oracle Applications System Administrator's Guide*.

Customer Care: Critical Customer Check

This profile option sets the Profile Check used to determine criticality of customers.

Default Value: Critical Customers

Customer Care: Default Outcome for Interactions

See Linking Outcome, Result and Reason Codes for information about this profile option.

Customer Care: Default Party Type

This profile option sets the default value in the Caller Type field in the Contact Center.

Default Value: Organization

Customer Care: Default Reason for Interactions

See Linking Outcome, Result and Reason Codes for information about this profile option.

Customer Care: Default Relation for Person

This profile option sets the default value in the Relation field of the Caller Information window.

Default Value: Employee of

Customer Care: Default Result for Interactions

See Linking Outcome, Result and Reason Codes for information about this profile option.

Customer Care: Default Tab for Contact Center

This profile option sets the default navigation tab that is open when the Contact Center form is opened.

Dealt Value: Dashboard

Customer Care: Install Base Form Check

This profile option identifies which Install Base window opens when the Installed Base button is clicked in Contact Center. The choices are Customer Products or Comms Customer Products.

Default Value: Customer Products

Customer Care: Log Task Activities Flag

This profile option sets the flag to control logging of Interaction Activities for Tasks.

Default Value: Yes

Customer Care: Service Request Form Check

This profile option identifies which Service Request window opens when the Details button is clicked in the Service Request tabbed page of Contact Center. The choices are Enter Service Requests or Enter Comms Service Requests.

Default Value: Enter Service Requests

Customer Care: User Currency Code

This profile option sets the user currency code used for multi-currency conversions.

Default Value: US Dollar

ContactCenter: New Contact default Create Account

This profile option specifies whether the Create Account check box in the Caller Information window is selected by default.

Default Value: No

ContactCenter: New Contact default address type

This profile option specifies the address type that appears by default in the Address Type field of the Caller Information window. The values in the list of values are derived from address types that are defined in Oracle Receivables.

Default Value: Bill to

ContactCenter: New Contact default phone type

This profile option specifies the default value that appears in the (Phone) Type field in the Caller Information window. The values in the list of values are derived from phone types that are defined in Oracle Receivables.

Default Value: WORK

CSI: Display HTML UI

This profile option specifies whether you want to see the Installed Base HTML user interface, or the Installed Base Forms user interface, when you open Oracle Installed Base from the Contact Center.

If you select No, the Installed Base Forms user interface is displayed, and the form displayed is the one specified in the profile option Customer Care: Install Base Form Check.

If you select Yes, the Installed Base HTML user interface is displayed, and the form displayed is the one specified in the profile option Customer Care: Install Base Form Check.

Default Value: No

Note: The following two conditions must also be verified if you want the Installed Base HTML user interface to be displayed.

- Check to see if Installed Base Search Products exists in the CSX_CUSTOMER_SUPPORT menu.
- The user's login responsibility is Oracle Installed Base User.

Service: Default new Note Type in Workbench Tab

This value sets the default value for the note type in a service request

Valid value: Any Note Type

Default value: None

Task Manager: Default task Status

This value sets the default Task Status value when creating a task.

Valid values: Any Task Status

Default value: None

Task Manager: Default task Type

This value sets the default Task Type value when creating a task.

Valid values: Any Task Type

Default value: None

Task Manager: Default task Priority

This value sets the default Task Priority value when creating a task.

Valid values: Any Task Priority

Default value: None

Task Manager: Default task Owner

This value sets the default Task Owner value when creating a task.

Valid values: Any valid resource.

Default value: None

Obsolete Profile Options

The following profile options are obsolete in Release 11.5.6:

- Customer Care: Number of Interactions displayed in Contact Center
- Customer Care: Default Territory for Contact Center
- CSC: Oracle Scripting Three Tier Installation
- CSC: Port for Oracle Scripting Application
- CSC: SID of Oracle Scripting Database
- CSC: Server Machine for Oracle Scripting

Note: To use Scripting, please refer to the *Oracle Scripting Implementation Guide*. For more information about setting up Tasks and Notes, refer to the *Oracle CRM Foundation Implementation Guide*.

2.8 Linking Outcome, Result and Reason Codes for Interaction History

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

2.8.1 Steps to link Outcome, Result, and Reason Codes

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

1. Define values for the following profile options. These profile options are mandatory.

Customer Care: Default Outcome for Interactions

This profile option sets the default outcome for Interactions and Activities in the Contact Center.

Default Value: Incoming

Customer Care: Default Result for Interactions

This profile option sets the default result for Interactions and Activities in the Contact Center.

Default Value: Message not Sent

Customer Care: Default Reason for Interactions

This profile option sets the default reason for Interactions and Activities in the Contact Center.

Default Value: Too Busy

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

   Setup > Customer Management > Interaction History Administration

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

2.9 Setting Up Customer and Account Numbering

Customer numbers and Account numbers can be generated manually or automatically. Two steps are required to set up this numbering feature.

To setup automatic Account number generation

1. Select an Oracle Receivables responsibility and navigate to the System Options window using the following navigation path.

   System > System Options

2. Open the Trans and Customers tab.

3. Check the Automatic Customer Numbering check box if you want to generate customer account numbers automatically in Customer Care.

   Note: Although this number is referred to as Customer Number in Receivables, this number is referred to as Account Number in Customer Care.

To set up automatic Customer number generation

Define the value for the system profile option called HZ: Generate party number. If you want to generate customer party numbers automatically in Customer Care, this values must be set to Yes.

A

Enabling Relationship Plans

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

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

A.1 Overview of Enabling Relationship Plans

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

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

A.2 Technical Overview of Enabling Relationship Plans

A.2.1 List of forms used:

CSCUTILS.fmb - Setup Form and Outcomes Window

A.2.2 List of tables used:

CSC_PLAN_ENABLE_SETUP

OKC_PROCESS_DEFS_V

A.2.3 List of packages and procedures:

PACKAGE CSC_PLAN_OUTCOMES

PROCEDURE GET_OUTCOMES (

p_FUNCTION_ID	NUMBER,
p_TRIGGER_EVENT	VARCHAR2,
p_PARTY_ID	NUMBER,
p_CUST_ACCOUNT_ID	NUMBER,
p_APPLICATION_SHORT_NAME	VARCHAR2,
p_MSG_TBL	OKC_AQ_PVT.MSG_TAB_TYP)

Description of Parameters:

1. P_FUNCTION_ID - The integrating form function id from table FND_FORM_FUNCTIONS
2. P_TRIGGER_EVENT - The triggering event that calls the outcomes. The allowed values are INSERT, UPDATE, CUSTOM1 and CUSTOM2.
3. P_PARTY_ID - Party Id from HZ_PARTIES.
4. P_CUST_ACCOUNT_ID - Customer account Id from HZ_CUST_ACCOUNTS_ALL
5. P_APPLICATION_SHORT_NAME - The short name of the application from FND_APPLICATION.
6. P_MSG_TBL - The msg_tbl has the following structure:

a. ELEMENT_NAME VARCHAR2(4000)

b. ELEMENT_VALUE VARCHAR2(4000)

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

A.3 Prerequisites

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

A.4 Steps to Enable Modules in Relationship Plans

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

```
if (wnd='OUTCOMES') then
        cscutils_app_custom.close_windo('OUTCOMES');
        --move focus to required block/field. for eg:
        GO_BLOCK('target block');
end if;
```

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

```
execute_trigger('CUSTOM1');
```

A.5 Functionality of the Setup form - CSCUTILS

A.5.1 Enable Relationship Plans - Setup Window:

To enable a module for relationship plans, the module should register its form functions with the relationship plans registering table called CSC_PLAN_ ENABLE_SETUP. This can be done via the Enable Relationship Plans - Setup form.

The Function column specifies the integrating form function name.

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

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

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

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

A.5.2 Outcomes Window

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

Outcome Name if the name of the outcome.

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

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

The Execute button executes the outcome.

The Cancel button closes the Outcome window.

A.5.3 Defining an Alert

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

A.6 Limitations

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

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

B

Seed Data for Relationship Plans

A seeded relationship plan called Expiring Contracts is included with 11.5.6. This relationship plan is designed to display an alert when you query a customer who has one or more contracts that will expire during the next 30 days.

> **Note:** **DO NOT MODIFY SEED DATA.** Seed data is provided for you to use as it is delivered. If you want to modify the setup of seed data, make a copy of the seed data and modify your copy.

A detailed description of the seeded data related to this relationship plan follows.

- Relationship Plan Header
- Condition Header
- Condition Type
- Outcome
- Parameter
- Outcome Header
- Outcome Argument
- Message Definition
- Profile Definition
- Action Header
- Action Attributes

Relationship Plan Header

- Plan Name - Expiring Contracts
- Plan Type - Template
- Description - Plans that display an alert when querying a customer who has one or more contracts that will expire in the next 30 days
- Profile Check - Expiring Contracts
- Operator - >
- Low Value - 0

Condition Header

- Condition Name - Customer Care - Condition for Expired Contracts.
- Description - Seeded condition for Relationship Plans.

Condition Type

Action - Customer Care - Generic Action

Outcome

CSC_EXPIRING_CONTRACTS

Parameter

- Parameter - CUST_PARTY_NAME
- Description - Name of the customer who has one or more contracts that will expire in the next 30 days.
- Data Type - CHAR
- Action Attribute - CUST_PARTY_NAME

Outcome Header (Process Definition)

- Name - CSC_EXPIRING_CONTRACTS
- Application - Oracle Customer Care
- Description - Outcome that will be fired when a customer has one or more contracts that will expire within the next 30 days. An alert message will pop up warning the agent about this.
- Purpose - Outcome

- Type - Alert
- Comments - Outcome for a relationship plan that fires when a customer has one or more contracts that will expire in the next 30 days.

Outcome Argument

- Name - CUST_PARTY_NAME
- Data Type - Char
- Description - Name of the customer who has one or more contracts that will expire in the next 30 days.

Message Definition

Message Name - CSC_EXPIRING_CONTRACTS

Message Tokens - CUST_PARTY_NAME

Message Description - Message used as an outcome in a Relationship Plan that fires when a customer has one or more contracts that will expire in the next 30 days.

Message Text - Customer &CUST_PARTY_NAME has one or more contracts that will expire in the next 30 days.

Profile Definition

Block:

- Name - Expiring Contracts
- Code - EXPIRINGCONTRACTS
- Description - Number of contracts that will expire in the next 30 days.
- Application - Oracle Customer Care
- Select - count(*)
- From - OKS_ENT_HEADERS_V A
- Where - (a.party_id = :party_id and :cust_account_id is null) and a.end_date_active <= sysdate + 30

Check

- Name - Expiring Contracts
- Code - EXPIRINGCONTRACTS

- Description - Number of contracts that will expire in the next 30 days.
- Application - Oracle Customer Care
- Type - Variable
- Variable - Expiring Contracts

Action Header

Action Name - Customer Care - Generic Action

Action Type - Action Based

Description - Customer Care generic action that has all the attributes from the contact center header region as well as some from SR, that can be used as additional condition or as arguments to an outcome.

Correlation - CUSTOMER_CARE_ACTION

Application - Oracle Customer Care

Enable - Yes

Counter Action - No

Allow Synchronous Outcomes - Yes

Action Attributes

The following is a list of the Action Attribute Name, Element Name, Description and Data Type for the attributes provided with the seeded Action named Customer Care - Generic Action.

- Customer Party Id, CUST_PARTY_ID, Customer Party Id, NUMBER
- Customer Party Number, CUST_PARTY_NUMBER, Customer Party Number, CHAR
- Customer Name, CUST_PARTY_NAME, Customer Party Name, CHAR
- Customer Type, CUST_PARTY_TYPE, Customer Party Type, CHAR
- Customer Status, CUST_PARTY_STATUS, Customer Party Status, CHAR
- Customer Account Id, CUST_ACCOUNT_ID, Customer account Id, NUMBER
- Contact Party Id, CONT_PARTY_ID, Contact Party Id, NUMBER
- Contact Party Number, CONT_PARTY_NUMBER, Contact Party Number, CHAR

- Contact First Name, CONT_FIRST_NAME, Contact First Name, CHAR
- Contact Last Name, CONT_LAST_NAME, Contact Last Name, CHAR
- Area Code, AREA_CODE, Area Code, CHAR
- Phone Number, PHONE_NUMBER, Phone Number, CHAR
- Extension, EXTENSION, Extension, CHAR
- E-mail Address, EMAIL, E-mail Address, CHAR
- Address, ADDRESS, Address, CHAR
- City, CITY, City, CHAR
- State, STATE, State, CHAR
- Postal Code, POSTAL_CODE, Postal Code, CHAR
- Province, PROVINCE, Province, CHAR
- Country, COUNTRY, Country, CHAR
- Caller Type, CALLER_PARTY_TYPE, Caller Type, CHAR
- Caller Status, CALLER_PARTY_STATUS, Caller Status, CHAR
- Category Code, CATEGORY_CODE, Category Code, CHAR
- Country Code, COUNTRY_CODE, Country Code, CHAR
- Contact Relation, CONTACT_RELATION, Contact Relation, CHAR
- Contract Id, CONTRACT_ID, Contract Id, NUMBER
- Contract Line Id, CONTRACT_LINE_ID, Contract Line Id, NUMBER
- Critical Overidden Flag, CRIT_OVERRIDE_FLAG, Critical Overidden Flag, CHAR
- Relation Meaning, RELATION_MEANING, Relationship code meaning, CHAR
- Account Number, ACCOUNT_NUMBER, Account Number, CHAR
- Contract Number, CONTRACT_NUMBER, Contract Number, NUMBER
- Contract Line Number, CONTRACT_LINE_NUMBER, Contract Line Number, NUMBER

C

Frequently Asked Questions About Setting Up Relationship Plans

What does Plan Type mean?

Relationship Plans can be of two types:

- Template Plan - These types of plans can be associated to any customer.
- Customized Plan - This type of plan is created only for specific customers.

Can a customized plan be created when the Define Relationship Plan responsibility is invoked?

No, a customized plan can be created only when a plan already exists and is associated to a group of customers. This plan can then be customized for a specific sub-group of those customers. When a plan is customized, a new plan in created in the application.

What is the Account Level check box in the Define Plan form?

Plans can be associated to customers at two levels.

- Party Level, in which case this check box is left unchecked. Party Level plans can be associated to customers only at party level.This means the plan is associated to all the customer accounts as well.
- Account Level, in which case this check box is checked. Account Level plans can be associated to customers only at account level. This means the plan is associated to a specific account of the customer and not to all the accounts.

What is the Group Name field in the Define Plan form?

Plans can be grouped together to form a logical set of plans. This group of plans can then be associated to customers and the customer gets the benefits and

outcomes of all the plans in the group. This functionality is not yet implemented as of 11.5.6.

Sometimes the Low Value and High Value values cannot be modified. Why is this?

These fields define the Relationship Plan header criteria. For example, consider the following Plan definition:

Open Service Requests > 5

This plan will be associated to customers who have more than five open service requests. Assume that Customer A has eight open service requests. If you try to modify the plan criteria so the high value is 10 instead of 5, this will not be allowed because Customer A, who has eight open service requests is already associated to the plan and would not satisfy the new plan criteria.

This update is allowed in the following scenarios:

- The plan is not associated to any customers.
- The new plan criteria does not violate any of the existing customer-plan associations.

The Relationship Plan is setup and the customer is associated to the plan, but the plan does not execute.

Relationship Plans are currently integrated with the Contact Center and Service Request forms. No other form can execute plans. If the plan is failing to execute from these two forms, check the following:

Navigate to Customer Support > Setup > Relationship Plans > Enable Relationship Plans and verify if the following entries exist and that the Custom1 check box is checked:

Function	Application
CSCCCCRC	Oracle Customer Care
CSXSRISR	Oracle Service

How do I set up Relationship Plans to pop up an alert?

In this example, we are creating a new message called RV30 and specifying the message text that needs to pop up in the alert window.

1. Navigation Path: Application Developer > Messages

2. Define an action called RV30 with the following attributes:
   - Action Type = Action Based
   - Correlation = CUSTOMER_RV30
   - Check the Enabled and Allow Synchronous Outcomes check boxes.
   - Name = CUSTOMER NAME
   - Element = CUST_NAME
   - Navigation Path: Customer Support > Setup > Relationship Plans > Events > Define Actions
3. Define a Process Definition (Outcome) called RV30 with the following attributes using this navigation path:

   Customer Support: Setup > Relationship Plans > Events > Define Process Definition
   - Purpose = "OUTCOME"
   - Type = "ALERT"
   - Name = "CUST_NAME"

   The process definition name should be the same as the message name).
4. Define a relationship plan called RV30. The plan header criteria is 'Open Service Request > 10' . The navigation path is Customer Support: Setup > Relationship Plans > Define Relationship Plans
5. In the Plan Details tab, create a new condition called RV30 using the action called RV30 and outcome RV30.
6. Click Parameters. In the Parameters window, right click and select 'Populate selected rows in parameters'. Invoke the list of values to populate the value for the Action Attribute field.
7. Attach the plan to the customer. In the Relationship Plans Search Screen, search for the customer to which the plan is to be attached.
8. Click **OK** to invoke the Plans Summary window.
9. Click **Add/Remove** to invokes the Add / Remove Plans window. This window displays all the plans the customer can be associated to. Select RV30 to add the plan called RV30 to the customer.
10. Open the Contact Center window and query the Customer. The Plan's alert message should pop up.

What manuals are available that describe Relationship Plans?

- Oracle Customer Care Implementation Guide
- Oracle Customer Care Concepts and Procedures
- Oracle Contracts For Service Concepts and Procedures

Why do extra outcomes sometime fire?

The same action is being used in multiple conditions.