

Oracle[®] Customer Care

Concepts and Procedures

Release 11*i*

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Oracle Customer Care Concepts and Procedures, Release 11*i*

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Oracle Corporation welcomes your comments and suggestions on the quality and usefulness of this document. Your input is an important part of the information used for revision.

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Preface

Audience for This Guide

Welcome to Release 11*i* of Oracle Customer Care Concepts and Procedures.

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 process-oriented, task based procedures for using the Oracle Customer Care Contact Center to perform essential business tasks.

- Chapter 3 provides process-oriented, task based procedures for using the Oracle Customer Care critical customer management functionality.
- Chapter 4 provides process-oriented, task based procedures for using the Oracle Customer Care Relationship Plan functionality.

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 Implementation Guide

This guide provides information required for implementing and setting up 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.

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 6i 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 Oracle*8i* server, and your hardware and software environment.

OracleMetaLink

OracleMetaLink 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 *OracleMetaLink*, 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 *OracleMetaLink* 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.

Understanding Oracle Customer Care

This section provides an overview of Oracle Customer Care and its components. It explains the key concepts, features, and functions of Oracle Customer Care and how it uses other Oracle applications.

1.1 Overview of Oracle Customer Care

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.

In today's technology driven world, it is essential for business organizations to provide customers with multiple channels of interaction. Customers need the ability to contact the customer care agent easily, using a preferred channel of communication. Oracle Customer Care provides a complete solution through seamless integration with Universal Work Queue (UWQ), Oracle iSupport and Email Center which enables the customers to initiate a contact with the service organization directly over the phone, through email or by requesting a callback.

Oracle Customer Care is the key differentiator for companies in highly competitive industries. As products become commodities, companies attract and retain customers on the basis of customer care management. Given that it is more expensive to attract a new customer than to retain existing customers, companies are increasingly focusing on making customer interactions more efficient and effective.

Oracle 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. Oracle Customer Care is comprised of the following modules:

- Contact Center
- Relationship Plans
- Customer Profile / Dashboard
- Critical Customer Management

1.2 Business Process

1.2.1 The Customer Care Agent

Typically, a customer care agent accepts direct calls from customers on multiple issues. A customer care agent relies on intuitive systems and ready access to customer information to perform the job effectively.

The primary focus of the customer care agent is to understand the customer's issue and resolve it on the first call, if possible, thereby avoiding escalations and/or call transfers. Often, the agent must resolve the issue in an allotted time span.

The Contact Center is a one stop shop for all customer interactions and transactions. It empowers the agent with extensive knowledge about the customer and enables him to address the needs of the customer effectively.

1.2.2 Customer Information Management

Contact Center is the central place for managing all customer information. The agent can view detailed information about the organization, contact, addresses and relationships for the customer and update the information as required. Being telephony enabled, the Contact Center can identify and display customer information based on certain identifying parameters.

The agent can use the search tool to quickly identify the customer. The agent can also create new customers in the system. The agent can also view the history of recent interactions with the customer. For further detail, the agent can drill down to the document attached to an interaction activity. Integration with Customer Intelligence enables the agent to view the profitability, satisfaction and loyalty levels for the customer.

Customer management involves tracking important customer data, and making it easily accessible to the customer care agent. Oracle Customer Care leverages the customer model (Trading Community Architecture, or TCA) which supports the Business to Business (B2B) and Business to Consumer (B2C) model. This approach focuses on “Relationships” as being the key differentiator of a customer. For instance, Joe Smith is a caller who is calling in on behalf of the company AtoZ.com. He is the contact for the company and he is a Manager in the Sales Department. He is also a member of 24 Nautilus Fitness. He is the father of Mary Smith and is the spouse of Jennifer Smith. These are defined as relationships and they play a pivotal role in rendering personalized service to the customer.

1.2.3 Customer Interaction Management

There are several ways in which a customer can initiate an interaction with a company: media items consist of inbound phone calls, emails, or web callbacks while non-media items can be service requests or tasks. The customer care agent can view the work items assigned to him from the Universal Work Queue (UWQ) screen and decide what he wants to start on. Through the UWQ screen the agent selects a media or a non-media work item.

Integration with Oracle Telephony Manager (OTM), through UWQ, is designed to facilitate media interactions. OTM routes the call to the appropriate agent based upon availability. Once the agent accepts the call, the contact center is populated with the customer information. The customer is identified on the basis of the phone number, account number, or other call parameters that the caller enters in the Interactive Voice Recognition (IVR).

The Contact Center provides a single interface for managing all customer transactions. The agent can log a quick service request, search the knowledge base for solutions, assign tasks, and enter and view notes for the customer. Integration with Oracle Scripting allows the agent to use scripts for problem resolution and this can be automated through use of Relationship Plans.

The intuitive user interface of the Contact Center is designed to enable an agent to handle the customer interaction as effortlessly as possible in the minimum amount of time necessary to achieve the desired result.

1.2.4 Customer Profile and Dashboard

The Customer Profile displays relevant summarized information about the customer that is appropriate for the agent to know. It may contain key indicators such as the lifetime value of the customer, critical customer status and various

other attributes. These indicators, or profile checks, are flagged by appropriate ratings and colors which give instant visual clues to the agents and enable them to engage appropriately with the customer. The agents have the ability to drill down from a key indicator to the detail list and eventually to the original transaction to make a more comprehensive assessment of the customer's situation. Customer Profile is completely configurable and organizations can tailor it to their specific business needs.

Customer Care offers a set of predefined profile checks belonging to the following categories:

- Service Requests
- Tasks
- Orders
- Contracts
- Installed Base
- Intelligence Measures

Customer Dashboard is an extended version of the Customer Profile. It provides a panoramic view of customer transactions and, like the Customer Profile, allows the agent to drill down to the original transaction. Customer Dashboard can be configured to display any number of key indicators and organized into categories for more meaningful display.

1.2.5 Critical Customer Management

Oracle Customer Care allows organizations to define rules governing the criticality of their customer base. A critical customer is based on the criteria defined in the Critical Customer profile check. When a customer is flagged as critical, the agent can then initiate proper action to resolve the situation or escalate the resolution process.

The Critical Customer Management feature of Oracle Customer Care enables agents to manually override the criticality of the customer. For example, there are situations when the profile engine may not determine that a customer is critical based on the rules setup, but the customer still needs to be flagged as critical in order for customer data to be displayed in all the relevant Oracle Customer Care windows.

In Release 11.5.6, a seeded profile check called Expiring Contracts is provided.

1.2.6 Relationship Plans

The Relationship Plans module is designed to enable companies to automate their customer service practices and to provide proactive and consistent care for all their customers. It provides organizations with a complete tool to revamp their customer service and provide closed loop support.

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 these plans would improve real-time responses to customer concerns which would in turn promote customer loyalty and enhance profitability. Examples of Relationship Plans are:

- Expiring Contracts (predefined in 11.5.6)
- Critical Customer Plan
- Premium Customer Plan
- Account Plan
- Non-profitable Customer Plan
- Product Plans
- Product Recall Plans
- Preventive Maintenance Plans
- Customer Interactions
- Customer Retention Plans
- Customer Satisfaction Plans

1.2.7 Integration with Other Oracle Products

Customer Care is fully integrated with the following Oracle products: Customer Intelligence, Contracts, Install Base, Support, Interaction Center, (Telephony Manager, E-Business Center, Advanced Inbound, Mail Center and Scripting) and CRM Foundation.

By using the Quick Menu, Customer Care is integrated with Knowledge Management, Depot Repair, Resource Manager, and Order Quoting - Forms.

Using the Contact Center

This chapter provides process-oriented, task-based procedures for using the Oracle Customer Care Contact Center to perform essential business tasks. The Contact Center provides agents with instant access to customer information. The following tabs, presenting important information about the customer, are accessible from the Contact Center:

- [Dashboard](#)
- [Relationships](#)
- [Organization](#)
- [Contact](#)
- [Addresses](#)
- [Contact Points](#)
- [Interactions](#)
- [Service Request](#)
- [Notes](#)
- [Tasks](#)

The Contact Center allows the agent to perform the following Customer Management tasks:

- [Start the Contact Center.](#)
- [View, update and create customer information.](#)
- [View the customer profile and drilldown to the details.](#)
- [View the customer dashboard and drilldown to the details.](#)

- View, update and create party relationships.
- View, update and create organization information.
- View and update caller/contact information.
- View, update and create party address information.
- View, update and create contact points for a party and party site.
- View interaction history and drilldown to the associated document at the activity level.
- Create a quick service request.
- View and create customer notes.
- Manage tasks.
- Use the Quick Menu.
- Use Oracle Scripting.
- View Install Base information.
- Access Customer Intelligence.
- Access Call Information
- Activate an Agent on Break
- Invoke Soft Phone
- Invoke Universal Work Queue
- Wrap up a call.
- End an interaction

2.1 Starting the Contact Center

The Contact Center can be started in two. You can open the Contact Center manually by navigating to it or automatically from the integration with Oracle Telephony Manager. If you are integrated with Oracle Telephony Manager, when a call comes in, the Contact Center opens and displays customer information based on certain parameters such as:

- Customer ID
- Customer Party Number

- Account Code
- Contact Number
- ANI / Email Address if the above parameters are not entered

For additional information about Oracle Telephony Manager, refer to *Oracle Interaction Center Implementation Guide* and *Oracle Interaction Center Concepts and Procedures*.

Use the following procedure to open the Contact Center window manually.

To start the Contact Center manually:

1. Select the Customer Support Responsibility.
The Customer Support Navigator window appears.
2. Use the following navigation path to open the Contact Center window:
Customer Management > Contact Center

The screenshot displays the Oracle Contact Center interface. At the top, there are tabs for 'Caller Information' and 'Profile'. The 'Caller Information' section includes fields for Organization (Business World), Title, First, Last, Middle, Phone (650 876-0987), Account (1000), Address (8476 Elk Grove Road), City (New York), State (NY), and Country (United States). The 'Profile' section shows 'Cancelled Contracts' (0) and 'Customer Opportunities' (0). Below the caller information, there is a navigation bar with tabs for Dashboard, Relationships, Organization, Contact, Address, Contact Points, Interaction, Service Request, Notes, and Task. The main area is divided into two sections: 'Tasks' and 'Contracts'. The 'Tasks' section shows a summary of tasks with counts and priority levels. The 'Contracts' section shows a summary of contracts with counts and priority levels. At the bottom, there is a navigation bar with buttons for Cust Intelligence, Call Information, Call Wrap Up, Eng Interaction, and Agent On Break.

Tasks		
Open Tasks	259	High
Approved Tasks	0	Low
Cancelled Tasks	7	Low
Rejected Tasks	0	Low
Accepted Tasks	5	Low
On-Hold Tasks	0	Low
Orders		
Booked Orders	604	High
Cancelled Orders	49	High

Contracts		
Active Contracts	109	High
Cancelled Contracts	0	Low
Expired Contracts	1	Low
Entered Contracts	13	Medium
On-Hold Contracts	0	Low
Terminated Contracts	0	Low
Installed Base		
Install Base Size	6738	High
Profitability	0	Low

2.2 Viewing, Updating and Creating Customer Information

To view customer information:

You may view caller details from the search window or by using the list of values available in the Contact Center window.

1. To search for customer information, use the following steps:
 - a. Click the Find button on the toolbar to open the Search window for querying customer details. Select Person or Organization as the Caller Type. Organization is the default entry if no choice is made.

The screenshot shows the 'Customer Search' window. At the top, there is a dropdown menu set to 'Organization'. Below it are two tabs: 'Basic' and 'Advanced'. The 'Basic' tab is active, showing search criteria: Customer Name (Business World), Customer Number (1000), Account Name, Account Number, Phone Type (General), Phone, and Address. There are 'Clear' and 'Search' buttons. Below the search criteria is a 'Results' section with a table of search results.

Customer Name	Customer ...	Account N...	Account N...	Phone	Email	Area Code	Extension
Business World	1000		1118	987-3452	andre@bw.com	408	
Business World	1000		1118	506.0098	andre@bw.com	650	
Business World	1000		1118	506.7000	andre@bw.com	650	
Business World	1000		1118	98.9876.23	andre@bw.com	543	
Business World	1000		1118	9612233	andre@bw.com	408	
Business World	1000		1000	987-3452	andre@bw.com	408	
Business World	1000		1000	506.0098	andre@bw.com	650	
Business World	1000		1000	506.7000	andre@bw.com	650	

At the bottom of the window are 'OK' and 'Cancel' buttons.

- b. Enter the name of the organization, or choose the name from the list of values. Any field in the Basic tab can be used to find the customer, such as contact, phone number, account number, address.
- c. You can also use the advanced search by opening the Advanced tab.

- d. Click **Search** to display the results of the search.
- e. Highlight the line displaying your customer in the Results region and click **OK**.

The Contact Center window displaying the relevant customer information opens.

2. To find caller information using the list of values in the Contact Center window, do the following:
 - a. Choose a caller type of Person or Organization to identify whether the customer is B2B or B2C.
 - b. Enter a value in the name, phone, account or name fields to choose a caller or company from the list of values.
 - c. All additional information such as relationship, address, party number are automatically displayed. In addition, all the tabs on the Contact Center window will also display the appropriate information.
3. If you need to update customer information that appears in the Caller Information region, you must do so in the appropriate tab, such as the Contact Points tab, Contact tab or the Addresses tab.

See Also

- [Using the Caller Information Region](#)

To create a new customer and an account:

1. Open the Contact Center window. For information on opening the Contact Center window, see [Starting the Contact Center](#).
2. Click **New**. The Caller Information window appears.

The screenshot shows the 'Caller Information' dialog box. At the top, the title bar reads 'Caller Information'. The main area contains several input fields and dropdown menus. 'Caller Type' is set to 'Organization'. 'Company' is an empty text field. 'Phone' is 'US' followed by two empty boxes. 'Ext' is an empty text field. 'Type' is 'Work'. 'Relation' is an empty text field. 'Account' is an empty text field. 'Party Num' is an empty text field. 'Party' is an empty text field. 'Account Role' is an empty text field. 'Email' is an empty text field. Below these fields is a checkbox labeled 'Create Account' which is checked. To the right of this checkbox is a small icon in square brackets. Below this is a section titled 'Address' with a rounded border. Inside this section, 'Address Type' is 'Bill To' with a checked 'Primary' checkbox. 'Country' is 'United States'. 'Address' is an empty text field. 'Effective From' is '01-NOV-2000' and 'Effective To' is an empty text field. At the bottom right are 'OK' and 'Cancel' buttons.

3. Choose a caller type in the Caller Type field.
 - To create an organization for a B2B customer, select Organization as the caller type.
 - To create a person for a B2C customer, select Person as the caller type.
 - To create a contact for a B2B customer, select Caller as the caller type.

The fields available to you depend on your selection in the Caller Type field. All selections result in the display of Phone, Party, Account Name and Email fields. If you select Organization as the Caller Type, the Organization and Relation fields are displayed. If you select Person or Contact, the fields related to the caller's name are displayed.

4. If you are creating a new caller for a customer, enter a relation. Also choose the party you want to associate with the caller. If you forget to enter the relationship during the creation step, the party relationship will not get created and you must create the relationship from the Relationship tab.
5. Optionally enter an email address in the Email field.
6. Select the Account check box if you want to create an account for this caller.
7. The Address field is a Flexible Address format. When you click on the field, a context value box appears where you must enter an address style. Then the address flexfield window appears where the user can enter all the address attributes such as Address Lines, City, State, Zipcode. The address flexfield attributes are based on what you define in the setup for each country. The default for the New window is US. Refer to the *Oracle Customer Care Implementation Guide* for setup of address flexfield.
8. Optionally enter effective dates in the Effective From and Effective To fields.
9. Click **OK** to save the information to the customer master.
10. The system can automatically generate and assign a Party Number to the caller. If the Account check box is selected, an account is created for the party. You can optionally choose to create a Party Number and Account Number manually, depending the value defined in the Receivables profile option called HZ: Generate Party Number and the Receivables system option called Automatic Customer Numbering. Refer to the *Oracle Customer Care Implementation Guide* for more information about these options.

Note: If you leave a field empty when you are creating a new organization, contact or caller, you must requery the record and navigate to the appropriate tab in order to update one of the empty fields. For example, if the primary contact point or

address is null, you must requery the record and then navigate to the Contact Point or Addresses tab to enter the information. You cannot update a null field in the header region. After you create the primary information in the tab, you must requery the record to see the new information in the Contact Center header.

Using the Caller Information region of the Contact Center:

1. Query for the customer information you want to update.
2. As soon as the query completes, you are in update mode. You can update the party name and all existing information displayed in the caller region.
3. The header region displays only the identifying address of the party. The query considers the following hierarchy when retrieving the identifying address, phone number and email address to display in the header region:
 - The query first looks at the subject, which is the caller.
 - If there is no primary address, phone number or email address at the subject level, then the object, or customer, is checked for a primary address, phone number or email address.
 - If there is no primary address, phone number or email address at the object level, then the relationship is checked.
4. If, during the creation of the party organization, person, or relationship, you forgot to enter the address, phone number or email address, then the field will be displayed as null. To update a null field, you must navigate to the appropriate tab as described below:
 - To update an address use the Addresses tab.
 - To update an email address or phone number use the Contact Points tab.
 - To update additional organization information use the Organization tab. This is applicable only if the Caller Type is equal to Organization.
 - To update information about the caller use the Contacts tab.

When you requery the customer, you will see your changes.

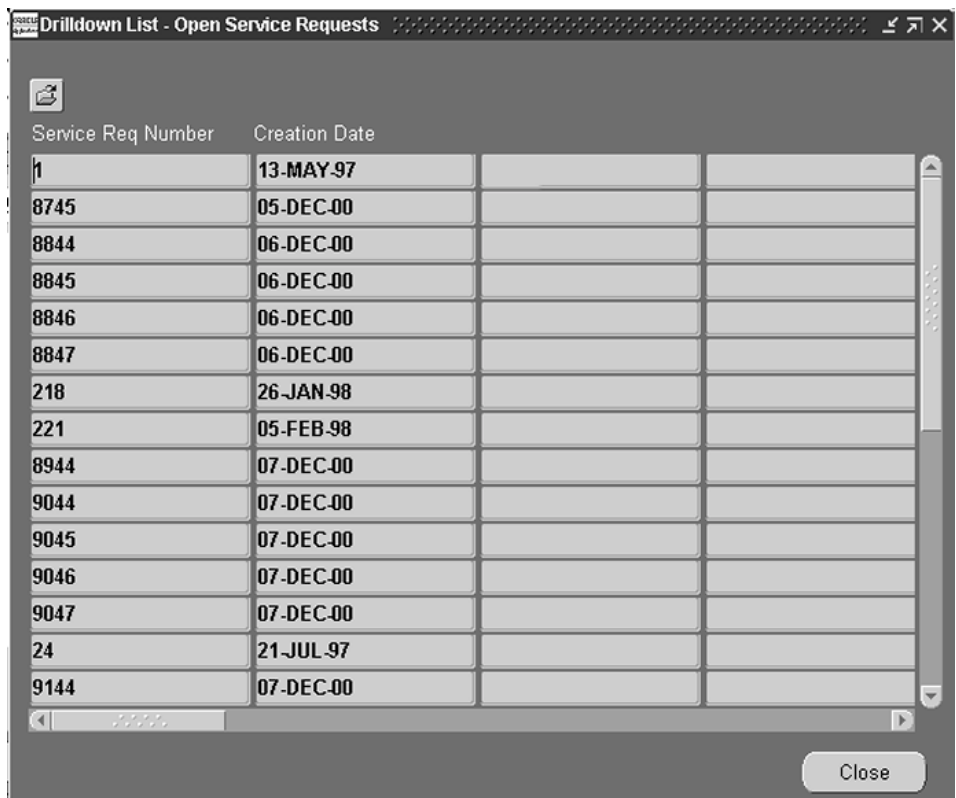
2.3 Viewing the Customer Profile and Drilling Down to the Details

The Customer Profile summarizes customer information and also indicates if a customer is critical. The profile entries appearing in the customer profile are typically set up by a system administrator, and contain a set of predefined checks. These checks are configurable, as are the actual range values and value definitions.

The check results are displayed by utilizing the Customer Profile Engine, which is a concurrent program.

To view the customer profile and drill down to the details:

1. The Customer Profile information is displayed in the upper right hand corner of the Contact Center window.
2. Click **Refresh** in the Profile window to view the latest information for the customer.
3. Double-click on a key indicator to view a summary list. For example, double-clicking on Open Service Requests (a key indicator) displays the drill down list showing all open service requests for the selected customer type. This list can display information such as the service request number, incident date, problem code and resolution code, depending on the setup.



The screenshot shows a window titled "Drilldown List - Open Service Requests". It contains a table with two columns: "Service Req Number" and "Creation Date". The table lists 17 service requests. The first row is highlighted. A "Close" button is visible in the bottom right corner of the window.

Service Req Number	Creation Date
1	13-MAY-97
8745	05-DEC-00
8844	06-DEC-00
8845	06-DEC-00
8846	06-DEC-00
8847	06-DEC-00
218	26-JAN-98
221	05-FEB-98
8944	07-DEC-00
9044	07-DEC-00
9045	07-DEC-00
9046	07-DEC-00
9047	07-DEC-00
24	21-JUL-97
9144	07-DEC-00

4. Double click on any line to view details of that transaction. The Service Request window containing details of the service request opens.

Note: The drill down feature is available only if it has been correctly defined. Please refer to Defining Drilldowns in the *Oracle Customer Care Implementation Guide*.

2.4 Viewing the Dashboard and Drilling Down to the Details

The Dashboard tab of the Contact Center window is an extension of the Customer Profile. It provides a comprehensive view of critical customer data, which familiarizes the agent with the customer. It displays concise customer information pertaining to tasks, contracts, orders, service, installed base as well as customer intelligence. You can also tell at a glance whether a customer is critical.

Information on the Dashboard tab helps to categorize profile checks. For example, all orders-related profile checks may be grouped together under the Orders category.

To view the dashboard:

1. Open the Dashboard tab from the Contact Center.

The screenshot displays the Contact Center software interface. At the top, there are tabs for 'Caller Information' and 'Profile'. The 'Caller Information' section includes fields for 'Organization' (Business World), 'Phone' (650 876-0987), 'Address' (8476 Elk Grove Road), and 'City' (New York). The 'Profile' section shows 'Cancelled Contracts' (0), 'Customer Opportunities' (0), and 'Number of Employees' (5051). Below these sections is a navigation bar with tabs for 'Dashboard', 'Relationships', 'Organization', 'Contact', 'Address', 'Contact Points', 'Interaction', 'Service Request', 'Notes', and 'Task'. A 'Last Refresh Date' of '05-SEP-2001 11:10:33' is shown, along with a 'Refresh' button and a 'View Details' button. The main area contains several performance indicators:

Category	Indicator	Value	Priority
Tasks	Open Tasks	259	High
	Approved Tasks	0	Low
	Cancelled Tasks	7	Low
	Rejected Tasks	0	Low
	Accepted Tasks	5	Low
	On-Hold Tasks	0	Low
Orders	Booked Orders	604	High
	Cancelled Orders	49	High
Contracts	Active Contracts	109	High
	Cancelled Contracts	0	Low
	Expired Contracts	1	Low
	Entered Contracts	13	Medium
	On-Hold Contracts	0	Low
Installed Base	Install Base Size	6738	High
	Profitability	0	Low

At the bottom of the interface, there are buttons for 'Cust Intelligence', 'Call Information', 'Call Wrap Up', 'End Interaction', and 'Agent On Break'.

2. Select to view the information for an organization, person, relationship or caller in the View By dropdown box.
3. You can view further details on any of the indicators by two methods:
 - Select an indicator and then click **View Details**.
 - Double-click on the indicator.

For example, to view a list of all accepted tasks, select the Accepted Tasks indicator and then click **View Details**. A window listing summary information on all the accepted tasks appears. Double-click on any given record to view further information about a specific task.

4. Click **Refresh** to refresh the indicator values. This runs the Customer Profile Engine for the current customer and displays the latest transactional information.
5. The Last Refresh date shows the last time the profile engine was run for this customer.

Note: Order Management Forms are used for the drilldown for profiles relating to orders. For Depot Repair, queries are available for profiles but not drilldowns.

2.5 Viewing, Creating and Updating Party Relationships

The Relationships tab in the Contact Center window displays party relationships that have been defined for the customer selected in the Caller Information region.

You can create new relationships from this tab and inactivate existing relationships by end-dating them. Since the Relationship tab is a folder block, you can use the folder functionality to personalize the appearance such as hide fields, move the position of the fields. A comment field has been added to the folder, so you can modify your folder to display the Comment field.

To create a new party relationship:

1. Open the Relationship tab in the Contact Center.

The screenshot shows the Contact Center interface with the Relationships tab selected. The Caller Information section is populated with the following data:

- Caller Type: Organization
- Organization: Business World
- Title: First
- Phone: 650 876 0987 Ext
- Account: 1000
- Address: 8476 Elk Grove Road
- Province:
- Last:
- Type: Cell
- Cust Num: 1000
- City: New York
- Postal Code: 10292
- Middle:
- Email: abeulie@bwo
- Relation:
- State: NY
- Country: United States

The Relationships table is displayed below, showing a list of active relationships:

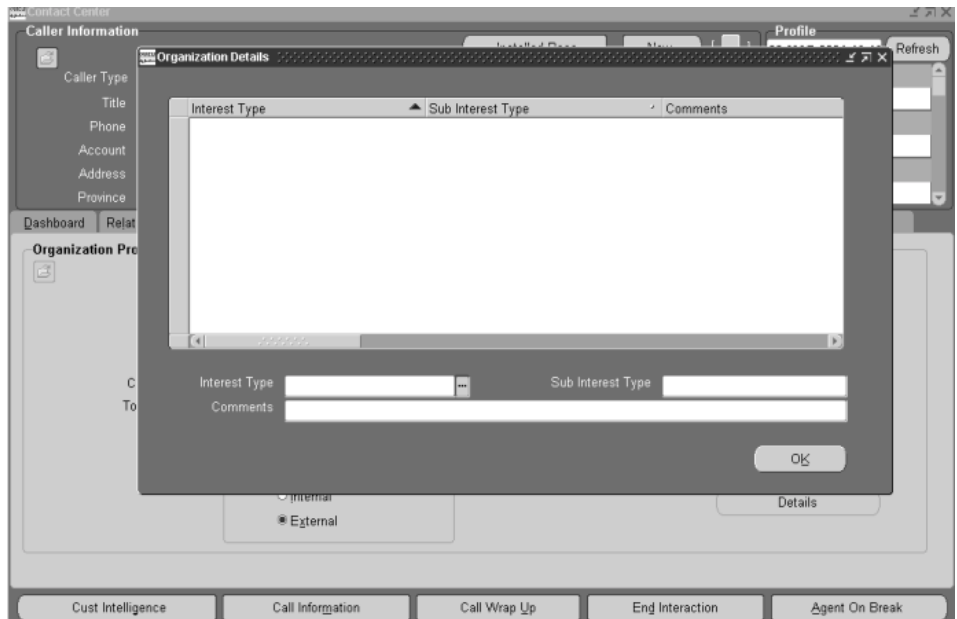
Status	Subject	Relation	Object	Title	Start Date
Active	Business World	Affiliate To	Department of Defense		15.AUG-2001
Active	Business World	Broker	Jay Kenslow		30.AUG-2001
Active	Business World	Contact	Erika Janson	Accounting Manager	07.AUG-1997
Active	Business World	Contact	Kirk Jensen	Accounts Payable Clerk	23.FEB-1997
Active	Business World	Contact	Jolene Smith-Kelly	Accounts Payable Super	21.FEB-1997
Active	Business World	Contact	Pierre Suave	Accounts Payable Super	23.FEB-1997
Active	Business World	Contact	Bob Feline	Accounts Payable Super	07.MAY-1997
Active	Business World	Contact	Joachim Schulze	Accounts Payable Super	06.OCT-1999

2. Click the New icon in the toolbar.
3. From the View By dropdown list, select one of the following:
 - a. Organization to display all relationships for the organization. This is available only if the Caller Type is equal to Organization as in a B2B scenario.

The screenshot displays the Oracle Contact Center interface for viewing and updating organization information. The main window is titled "Contact Center" and contains several sections:

- Caller Information:** Includes fields for Caller Type (Organization), Title, Phone (650 506.7000), Account (1000), Address (2391 L Street), and Province.
- Organization:** Includes fields for Organization (Business World), Last, Middle, Type, Cust Num (1000), City (San Jose), Postal Code (95053), Email (andre@bw.co), Relation, State (CA), and Country (United States).
- Profile:** Includes a date field (25 JUN 2001 00:00), a Refresh button, and a Large Company field (279447).
- Organization Profile:** A detailed form with fields for SIC (222), Alias, Long Name (Business World), Customer Since (1995), Total Employees (1200), Business Line, Customer Category (Utilities), Current Revenue, Projected Revenue, Analysis Year, Fiscal Year End, Tax Reference Num, Duns Number, and Fiscal Code. It also includes a checkbox for "Public Sector Agency" and radio buttons for "Internal" and "External" organization types.
- Navigation:** A menu bar at the top includes Dashboard, Relationships, Organization, Contact, Address, Contact Points, Interaction, Service Request, Notes, and Task.
- Footer:** Includes buttons for Cust Intelligence, Call Information, Call Wrap Up, Eng Interaction, and Agent On Break, along with a Record: 1/1 indicator.

You can use the Details button to open a window for entering the interests of the organization.



2.7 Viewing and Updating Caller/Contact Information

The Contact tab of the Contact Center window displays information about the caller selected in the caller information region. Information presented in this tab includes pronunciation of the contact's name, nickname, native language, salutation, department the contact works for, and job title.

The Contact Restrictions region may be used as a guideline when initiating a callback to the contact. For example, it may indicate that the customer cannot be reached for a certain time period when he is out on vacation.

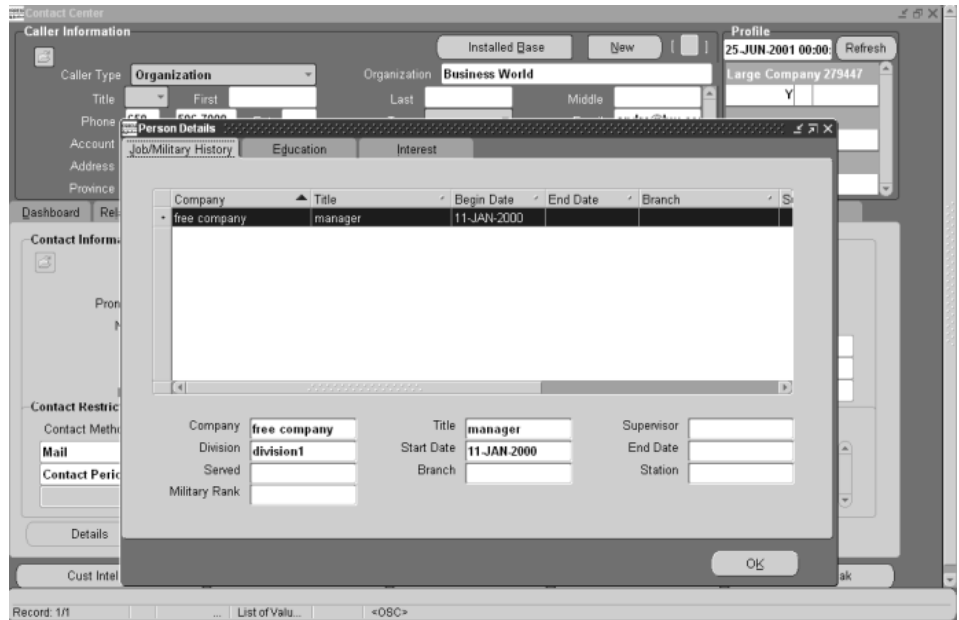
To view or update contact information:

1. Open the Contact tab in the Contact Center.
2. Update the necessary fields.
3. Save your changes.

The screenshot displays the 'Contact Center' application window. The 'Caller Information' section includes fields for Caller Type (Organization), Title, Phone (650 506.7000), Account (1000), Address (2391 L Street), and Organization (Business World). The 'Contact Information' section includes Pronunciation (milandar), Nickname (mil), Suffix, 2nd Title, Mail Stop, Dept Code, Department, Job Title Code (Controller), and Job Title (Controller). The 'Contact Restrictions' section contains a table with columns for Contact Method, From, To, and Reason.

Contact Method	From	To	Reason
Mail	24-FEB-1997		Relocation
Contact Period	22-MAY-2001		

4. To create a contact restriction, add a new record in the Contact Restrictions region. From the list of values, select a contact method.
5. In the From and To fields, enter the date range that the restriction pertains to.
6. Select a reason for the contact restriction from the Reason list of values.
7. To see further details, click **Details**.
8. The Details window contains detailed contact information in the Job/Military History, Education and Interest tabs.



2.8 Viewing, Updating and Creating Party Address Information

The Addresses tab in the Contact Center window displays the addresses and site usages associated with the customer.

You can view, update and create address information and site usages from the Addresses tab for a customer, caller or relationship by selecting the appropriate option from the View By dropdown list. You can create a new address for a party by choosing from available locations or you can create a new address. This allows the reuse of existing addresses.

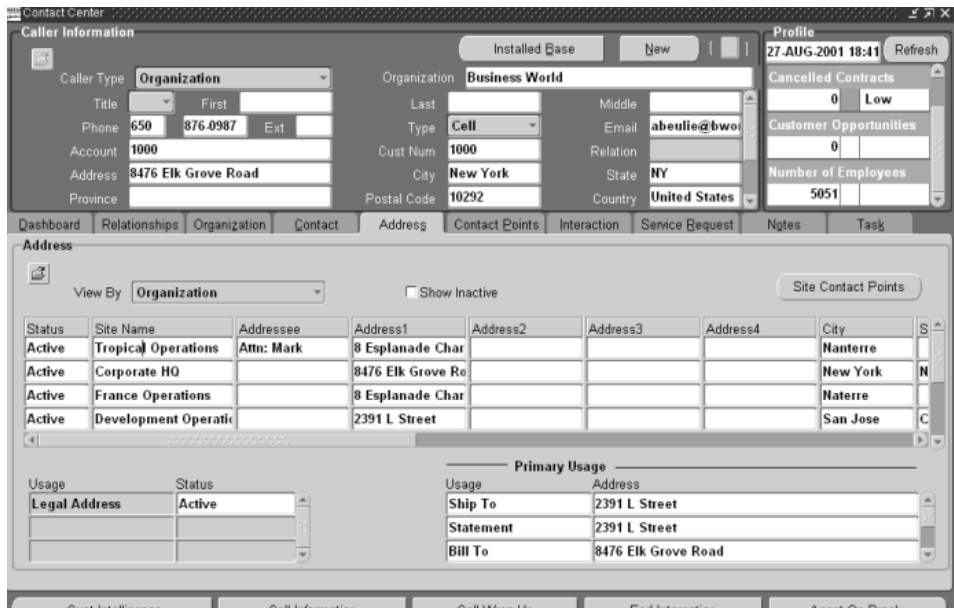
The party's identifying address is displayed in the Contact Center header region. The identifying address is derived from the first address you enter when you create the party. If you want to assign a different identifying address, you must first create the address in the Addresses tab and then select the new address from the Address list of values while in the Contact Center header. You can have one identifying address for each party.

The Addresses tab is a folder block, so you can use folder functionality to personalize the appearance, such as hiding fields and moving the position of fields. The Addresses tab consists of three regions.

The Party Site region of the Addresses tab displays a list of party sites along with address information. The Usage region displays the details of the usages for party site selected in the Party Site region. The Primary Usage region displays all primary sites for each usage type for the party. You can view, update and create multiple usages for each party site. You can assign one address as primary for each usage.

To create a new party address:

1. Open the Addresses tab in the Contact Center.



2. Click the New Record icon in the toolbar.
3. Select the appropriate option from the View By dropdown box. The choices are Organization, Person, Caller and Relationship.
4. Select a status of Active.

5. Enter a descriptive name to describe the location for the party in the Site Name field. An example of site name is 'HQ' as the site name for the address representing Oracle's headquarters.
6. Optionally enter a mailing name in the Addressee field. An example of an addressee is 'Attention: Accounts Payable'.
7. You can select an existing address in the Address1 list of values or you can create a new address. This list of values contains all addresses in HZ_ LOCATIONS. If you select an existing address, the remaining address fields are automatically populated. If the location is not available from the list of values, you can create a new location by entering the appropriate values in the remaining applicable address fields.
8. Save your changes.
9. You can create a usage for each address, such as Bill to or Ship to. Select a usage from the Usage list of values and a status from the Status list of values.
10. Save your changes.
11. In the Primary Usage region, you can assign an address as primary for each usage. Select a usage from the Usage list of values and then select the address you want to be primary for this usage from the Address list of values.

To create a site contact point for a party site:

1. While in the Addresses tab, you can associate a contact point with an address site. Click **Site Contact Points** to open the Site Contact Points window.

Do not	Contact Method	Type	Value	Extension	Best Time From	Best Time To
<input checked="" type="checkbox"/>	Pager		800-777-1234			
<input type="checkbox"/>						
<input type="checkbox"/>						
<input type="checkbox"/>						

2. The party address is displayed by default. Select a contact method from the Contact Method list of values. All contact methods are seeded values. The valid contact methods are Phone, Web and Email, EDI, and Telex.

3. The next fields vary depending on the contact method you select:
 - a. If you select Phone as the contact method, select a value from the Type list of values. Enter values in the Country Code, Area Code, Value and Ext fields, if applicable. The Value field is for the main phone number and the Ext field is for the phone extension.
 - b. If you select Web as the contact method, the form takes you to the Value field for entry of a URL.
 - c. If you select Email as the contact method, the form takes you to the Value field for entry of an email address.
 - d. If you select EDI, enter the appropriate value in the Value field.
 - e. If you select Telex, enter the appropriate value in the Value field.
4. Optionally enter values in the Best Time From and Best Time To.
5. If you do not want a contact method to be used, check the Do Not check box.
6. Save your work to return to the Addresses tab.

To view and update party addresses:

1. Open the Addresses tab in the Contact Center.
2. Select the appropriate option from the View By dropdown box. The choices are Organization, Person, Caller and Relationship.
3. All active address information is displayed. To see inactive address information, click the Show Inactive check box.
4. If you need to update an address because it was entered incorrectly, you can update any field in the Addresses tab. If an address is no longer being used, you can inactivate the address by updating the Status to Inactive and then adding a new address.

2.9 Viewing, Updating and Creating Contact Points for a Party and Party Site

A contact point is a means of contacting a party, such as phone number, fax number or email address. The Contact Points tab in the Contact Center window allows you to view, update and create contact point information for the party organization, party person or party relationship. You can also set a primary contact point for each contact method and define restrictions that apply to a certain contact point.

To create a contact point:

1. Open the Contact Points tab from the Contact Center.

The screenshot shows the 'Contact Center' application window. The 'Caller Information' section is filled with data for an organization named 'Business World'. The 'Contact Points' section is active, showing a table of contact methods. The 'View By' dropdown is set to 'Organization'. The table lists three contact methods: Phone, Web, and E-mail. The 'Phone' method is selected as the primary contact point.

Do not	Contact Method	Type	Value	Extension	Best Time From	Best Time To
<input type="checkbox"/>	Phone	General	408 987-3452			
<input type="checkbox"/>	Web		www.oracle.com			
<input type="checkbox"/>	E-mail		abeulle@bworld.com			
<input type="checkbox"/>	Phone	General	1 650 876-0987			

Primary Contact Points			
Contact Method	Country Code	Area code	Value
Web			www.oracle.com
E-mail			abeulle@bworld.com
Phone	1	650	876-0987

2. Click the New icon in the toolbar.
3. Select the appropriate value from the View By dropdown list. The choices are Organization, Person, Caller or Relationship.
4. If you do not want a contact method to be used, check the Do Not check box.
5. Select the contact method from the list of values. All contact methods are seeded values.
6. The next fields vary depending on the contact method you select:
 - a. If you select Phone as the contact method, select a value from the Type list of values. Enter values in the Country Code, Area Code, Value and Ext fields, if applicable. The Value field is for the main phone number and the Ext field is for the phone extension.
 - b. If you select Web as the contact method, the form takes you to the Value field for entry of a URL.

- c. If you select Email as the contact method, the form takes you to the Value field for entry of an email address.
- d. If you select EDI, enter the appropriate value in the Value field.
- e. If you select Telex, enter the appropriate value in the Value field.
7. Optionally enter values in the Best Time From and Best Time To.
8. In the Primary Contact Points region, you can select a primary contact point for each contact method. Select the Contact Method from the list of values, then select a contact point value from the list of values.
9. Save your work.

2.10 Viewing Interaction History and Drilling Down to an Associated Document

The Interactions tab displays recent interactions history for the selected customer party. The interactions appear in the spreadsheet above and the associated activities appear below. Profile options determine the default reason, result and outcome for interactions. You can override these in the Call Wrap Up window. See [Wrapping up a Call](#) for additional information.

An interaction can have multiple activities associated to it. For example, a call from a customer would be displayed as an inbound call. If the agent then performed a number of tasks such as logging a service request and creating a callback task, the service request and task would be logged as activities for that interaction. The profile option called Customer Care: Log Task Activities Flag must be set to 'Yes' for this to work correctly.

Besides viewing details of recent customer interactions, you may drill down to view activities to which documents are associated.

To search for a specific interaction:

1. In the Contact Center window, select the caller whose interaction history is to be viewed.
2. Open the Interactions tab.

The screenshot displays the Contact Center interface. At the top, there are tabs for 'Caller Information', 'Profile', and 'Service Request'. The 'Caller Information' section includes fields for Organization (Business World), Title, Phone (650 506.7000), Account (1000), Address (2391 L Street), and City (San Jose). The 'Profile' section shows the date and time (25 JUN 2001 00:00) and a Refresh button. Below these are navigation tabs: Dashboard, Relationships, Organization, Contact, Address, Contact Points, Interaction, Service Request, Notes, and Task.

The main area is titled 'Interaction-Activities' and contains a table with columns: Interaction Id, Customer Name, Date, Start Time, Reason, Result, and Outcome. The table lists three interactions for 'Business World' on '25-JUN-2001'. Below this is the 'Activity Details' section, which shows a table with columns: Start Time, End Time, Media, Activities, Document, Reason, Result, and Outcome. It lists two activities for 'A task is created Service Requ...' with document numbers '92345'.

At the bottom, there are buttons for 'Cust Intelligence', 'Call Information', 'Call Wrap Up', 'End Interaction', and 'Agent On Break'. The status bar at the very bottom shows 'Record: 1/1' and '<OSC>'.

3. Click the **All Interactions** button.

The Customer Interaction History window opens. From this window, you can search for all interactions or activities for this party.

4. If you want to restrict the view to only the account specified in the Contact Center header, check the View By Account check box.
5. Enter appropriate search criteria, such as a range of dates, and click **Search**.

To drilldown to an associated document from an activity:

1. Follow the steps [To search for a specific interaction](#) above.
2. Find the activity you want to drill down to in the Activity Details region of the window.
3. Double-click on the document number. For example, if you are drilling down to a service request, then double-click on the service request number. The Service Request window displaying the details opens.

2.11 Creating Quick Service Requests

The Service Request tab in the Contact Center allows you to create a quick service request for the customer party. The service request may or may not be related to a problem with a product. If the problem is product related, you can validate it against the Installed Base for the customer.

From the Service Request tab, you can access Knowledge Base, a rich repository of solution sets, to resolve the customer problem during the very first customer interaction. The embedded knowledge management module, leveraging the Oracle Inter-Media technology, enables you to search, capture, and manage problem resolution information from existing service requests. It offers multiple search capabilities which allow you to find information easily.

Contract entitlements of the customer can also be viewed from the Service Request tab. Based on the contracts in effect, you can render the appropriate level of customer support.

To log complex service requests, use the Service Request window. To open this window, click **Details** from the Service Request tab. Refer to *Oracle Support Concepts and Procedures* for more information about complex service requests.

To create a quick service request:

1. From the Contact Center window, open the Service Request tab.

Caller Information

Organization: Business World
 Title: Andrew
 Phone: 408 987-3452
 Account: 1000
 Address: 2391 L Street
 Province: [blank]

Profile

07-MAR-2001 13:46 Refresh

Booked Orders: 385 HIGH
 Cancelled Orders: 6 LOW
 Open Orders: 399 HIGH

Service Request

Request: 30544
 Account: 1000
 Owner: Smith, Ms. Susa
 Type: Customer Call
 Urgency: Inoperable
 Severity: High
 Status: Open
 Date: 08-MAR-2001 10:00
 Product: AS18947
 Serial Number: SM100000
 Summary: Product does not work
 Problem: [blank]
 Resolution: [blank]
 Respond by: 09-MAR-2001
 Contract: 10080

Notes

Type: Symptom
 Status: Internal
 Note: Hard disk crash.

Contracts

Contract	Service	Description	Warranty	Start Date	End Date
<input checked="" type="checkbox"/> 10080	WR18533	Extended Desktop PC Service Program	<input type="checkbox"/>	17-OCT-2000	16-OCT-2001
<input type="checkbox"/> 10360	WR43990	Extended Notebook PC Parts Only Service Program	<input type="checkbox"/>	01-OCT-2000	16-OCT-2001

Active Contracts: All Contracts: Get Contracts

Details Submit

Cust Intelligence Call Information Call Wrap Up Eng Interaction Agent On Break

2. The Owner, Type, Severity, Urgency, Status, and Date fields default from profile options. You may change these values, if needed.
3. Select the Installed Base check box if the issue is about a customer product. If this check box is selected, the Product list of values displays only the products installed at the customer site, otherwise it displays all inventory items.
4. Optionally select a product and a serial number for the product. If you selected the Installed Base check box, then you can select a serial number from a list of values. If not, serial number is a user enterable text field.
5. If you selected the Installed Base check box, then you must select a reference number from the list of values. This field is mandatory if Installed Base is checked.
6. Enter a brief description of the problem in the Summary field. This field is mandatory.
7. Optionally choose a problem type in the Problem field.
8. The Resolution field can be populated when the service request is resolved.

9. Optionally select the time frame for the resolution of the problem in the Resolution By field.
10. Optionally enter a note. To enter a note, do the following:
 - a. Choose a note type and note status.
 - b. Enter a note.
 - c. In the Related to field, select the context to which the note is to be associated.
 - d. In the Value field, optionally select the value for the context you have selected.

For example, you can associate a note to another service request. Assuming that the service request number is 10152, you would select Service Request in the Related to field and 10152 in the Value field.

11. To check if there is a contract available, click **Get Contracts**. You can choose to see either Active Contracts or All Contracts by using the radio buttons.
12. The contracts area shows the various contracts for the customer. Double-click the contract number to view coverage information for a specific contract. Select the contract that applies to this service request.

The date in the Respond By field is defaulted based on the contract selected.
13. Click **Submit**. The system generates a service request number and displays it in the Request field. You can give this number to the customer as reference.
14. You can perform a search of the knowledge base by clicking the button next to Details at the bottom of the window. The summary, product, contact and symptom are passed to the knowledge base. Refer to *Oracle iSupport Concepts and Procedures* for more information about searching the knowledge base.

2.12 Viewing and Creating Customer Notes

The Notes tab of the Contact Center window helps you create notes about the current customer interaction. You can also access existing notes from this tab. You can only create new notes in the Notes tab; you cannot update existing notes. Notes are created for customer parties.

To view customer notes:

1. From the Contact Center window, open the Notes tab. Notes from previous interactions with the customer are displayed in the spreadsheet in the Notes tab.

The screenshot displays the Contact Center interface. At the top, there are tabs for 'Caller Information', 'Profile', and 'Refresh'. Below these, there are fields for 'Organization' (Frozen Foods International), 'Cust Num' (1195), 'City' (San Jose), and 'Country' (United States). A 'Notes' section is visible, containing a table with columns 'Note' and 'Type'. The table has three rows: 'Need to dispatch a field engineer immediately' (Activity), 'Call to repair disk drive was not resolved.' (Interaction), and 'This is a critical customer' (DISCOVER). To the right of the table, there are fields for 'Type' (Activity) and 'Status' (Internal). Below the table, there are 'New' and 'Detail' buttons. At the bottom of the interface, there are buttons for 'Cust Intelligence', 'Call Information', 'Call Wrap Up', 'End Interaction', and 'Agent On Break'. The status bar at the very bottom shows 'Record: 1/1' and '<OSC>'.

2. To view details of a note, select the note from the spreadsheet. The contents of the note appear on the right.
3. If the Details field indicates that the Note has associated details, you can click **Details** to view additional lengthy descriptions.

To create a customer note:

1. From the Contact Center window, open the Notes tab. Notes from previous interactions with the customer are displayed in the spreadsheet in the Notes tab.
2. Click **New** to create a new note for the current customer interaction.
3. Select the type of note you want to create in the Type field.
4. Select the status for the note in the Status field. The choices are Private, Public and Publish. If you use the Private status, this note can be viewed only by the support agent who created the note. Public notes can be viewed by all internal employees. Publish notes can be viewed by all internal employees as well as external customers via Oracle iSupport.
5. Type in a summary of your customer interaction in the Note text box.

6. If you want to enter more details about the note, click **Detail** to open the Note Detail window. You can type in additional description in this window.
7. Select a value in the Related to field if you want to associate this note to a another document. Enter the appropriate value in the Value field.
8. Click **OK** to return to the Notes tab.
9. Save the note you have created.

2.13 Managing Tasks

A task, defined in the simplest terms, is a work item. Tasks typically describe the actions required of personnel to resolve a service request. You can create a task for yourself or assign tasks to other resources. For example, you can create a task to call back a customer or a task to dispatch a service engineer to make a repair at a customer site.

You can manage customer party tasks from the Tasks tab of the Contact Center window. In the Tasks tab, you can create, update, assign and view previous tasks associated to the customer party. You can access Task Manager and launch a task related workflow. You can also associate a note to a task.

Previous tasks for the customer are listed in the spreadsheet at the top of the tab, while details of the selected task are displayed in the fields below it. You can create a task directly from the Task tab by entering all the relevant information or by using a template.

See Also:

- [Creating a Task Manually](#)
- [Creating a Task Using Task Template](#)
- [Entering Task Details](#)
- [Defining Resource Requirements](#)
- [Setting Task Dependencies](#)
- [Linking Tasks to Source Documentation](#)
- [Setting Recurrence Schedule](#)
- [Viewing Audit History for the Task](#)

2.13.1 Creating a Task Manually

To create a task manually:

1. Open the Task tab in the Contact Center window.

The screenshot shows the 'Contact Center' application window with the 'Task' tab selected. The 'Caller Information' section is populated with data for 'Business World' organization, including phone number 650-876-0987 and address 8476 Elk Grove Road. Below this is a table of tasks:

Date	Number	Type	Status	Priority	Owner	Name	Description	Public
10-OCT-20...	10493	Callback	Open	Medium	Daugherty,...	Call customer	Get the manager to call the cus...	✓
06-JUN-20...	10920	Follow up ...	Open	Medium	Abbott, M...	task	testing	✓
	10452	Callback	Open	Medium	Daugherty,...	Call customer	Call customer with the sol in on...	✓

The 'Task' form below the table has the following values:

- Num: 10493
- Status: Open
- Escalation: (empty)
- Restrict Closure:
- Type: Callback
- Priority: Medium
- Owner Type: Employee Res
- Assignee Type: Employee Res
- Name: Call customer
- Parent: (empty)
- Owner: Daugherty, Mr.
- Assignee: Daugherty, Mr.
- Desc: Get the manager to call the customer ASAP about the product service.
- Private: Publish:
- Dates: Start 10-OCT-2000 09:00, Actual (empty), Duration 0 Day
- Buttons: Task, Notes, Use Template, Launch Workflow, More...

2. Values in fields such as Status, Type, Priority, Owner Type, Assignee Type, and Owner are displayed by default based on profile options. You can use the list of values associated with these fields to change the default values.
3. Enter a name for the task in the Name field.
4. In the Desc. field, enter a brief description about the task.
5. If needed, in the Parent field, select a task to which this task is to be linked. Normally, you would select a parent task if the task you are creating is a follow up on another task.
6. Optionally select the Restrict Closure flag. A task with restricted closure means that if this task is related to a service request, the service request cannot be closed until this task is closed.

7. You may use the default values in the Assignee and Owner fields or change them by selecting from the list of values. You can also change these fields by using the Assignment Manager. To access the Assignment Manager, click the Assignment Manager button next to the fields. The Assignment Manager looks up the Calendar, Territory Management and Resource Management modules to assign an appropriate resource for the job based on skill set, availability and assigned territory. For additional information about the Assignment Engine, refer to *Oracle CRM Foundation Concepts and Procedures*.
8. Select the Planned Start and End Dates.
9. Optionally enter a value in the descriptive flexfield. A descriptive flexfield was added in Release 11.5.6.
10. Save the task. When saving the task, a system generated task number is displayed in the Num field.
11. To manually launch workflow, click **Launch Workflow** if there is a workflow process associated with this task type. You should receive a message indicating that workflow was successfully launched.
12. To access the Task Manager, click **Task**.
13. To create notes for this task, click **Notes**.
14. Click **More** to open the Task Details window to enter details such as resource assignments, dependencies, references, and contacts.

2.13.2 Creating a Task Using the Task Template

To create a task using the task template:

1. Open the Task tab in the Contact Center window.
2. Click **Use Template**.



3. The Create Tasks from Template Group window opens.
4. In the Template Group field, select the template group based on the task which is to be created. Values in the Source Document, Source Value, Owner Type and Owner fields are defaulted. You may change these values, if needed.
5. Click **Create Tasks**.
6. To manually launch workflow, click **Launch Workflow** if there is a workflow process associated with this task type. You should receive a message indicating that workflow was successfully launched.
7. Click **More** to open the Task Details window to enter details such as resource assignments, dependencies, references, and contacts.

2.13.3 Entering Task Details

The Task Details window helps you enter details such as resource assignments, dependencies, references, and contacts for the current task. To open the Task Details window, click **More** in the Task tab of the Contact Center window.

See Also:

- [Defining Resource Requirements](#)
- [Setting Task Dependencies](#)
- [Linking Tasks to Source Documents](#)
- [Setting Recurrence Schedules](#)
- [Viewing Task Audit History](#)

2.13.3.1 Defining Resource Requirements

Define resources as the tools and/or personnel needed to complete a task. The task owner assigns and schedules the required resources after choosing the best available options.

To define resource Requirements:

1. Open the Task Detail window by clicking **More** in the Task tab. The Resource tab opens by default.
2. In the Resource Type field, select the resource type needed to solve the customer issue.
3. In the Unit field, enter a numeric value. This value determines the numbered amount of a particular resource, for example, three hours.
4. Select the enabled check box if it is not already checked by default.
5. In the Assignments region, select from the list of values in the Type and Name fields.
6. Select the status of the task in the Status field.
7. If you want to schedule a resource, select the Schedule check box. To complete scheduling:
 - a. Enter scheduled distance and duration values, and select a unit of measure.
 - b. If you want to update actual schedule information, enter the actual Start and End dates.
 - c. You may use the Assignment Manager to select and schedule the resource. To open the Assignment Manager, click the Assignment Manager button.
8. Click **Save** to save your work.

2.13.3.2 Setting Task Dependencies

Task dependencies store the desired order among tasks. Dependencies are not enforced within CRM applications and dependency information is provided for exporting data to third party applications.

Prerequisite

You must create a task before you can set dependencies for it.

To set task dependencies:

1. From the Task Detail window, open the Dependencies tab.
2. Select the dependent task number from the list of values in the Task Number field. The task name is automatically displayed.
3. Enter a numerical value in the Offset field. This value determines the time that separates the action of initial tasks from subsequent tasks. Use this feature to organize tasks with time sensitive restrictions.
4. Select a unit of measure in the UOM field.
5. Click OK.

2.13.3.3 Linking Tasks to Source Documentation

Creating references to a source document allows you to reference pertinent background information. Source documentation could be the original request document that resulted in the creation of a task.

To link a task to its reference document:

1. From the Task Detail window, open the References tab.
2. Select from the list of values in the Document Type field.
3. Enter the identification number of the source document in the Number field.
4. Click OK.

2.13.3.4 Setting Recurrence Schedules

If the task is to be performed on a regular basis, you may specify a daily, weekly, monthly, or yearly schedule.

To set a recurrence schedule for a task:

1. From the Task Detail window, open the Recurrences tab.
2. Select the frequency for the recurrence of the task by selecting the Daily, Weekly, Monthly, or Yearly button. Your selection determines the fields available in the Recurrences tab.
3. In the Start field, select the date after which the task is to be repeated.
4. Optionally, in the End field, select the date that the task terminates.
5. Set the recurrence schedule.

6. Click OK.

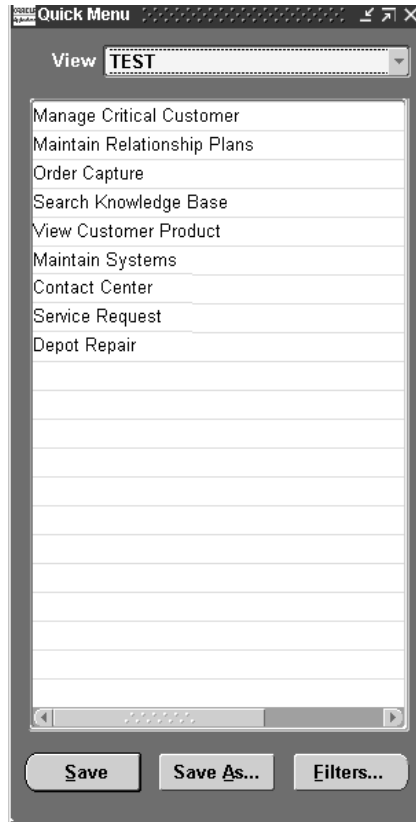
2.13.3.5 Viewing Audit History for the Task

The Audit tab presents historical information on the changes that have been made to the task.

2.14 Using the Quick Menu

The Quick Menu enables you to easily navigate to other windows and pass customer data from the current window. For example, if you query on a customer called Business World in the Contact Center, you can navigate to the Manage Critical Customer window through the Quick Menu and in information about Business World defaults in the new window.

Using Quick Menu, you can store frequently used criteria and open windows more quickly than by manually entering the search criteria and then searching for records. The use of Quick Menu improves the efficiency of your business flows. To invoke Quick Menu, select the Quick Menu icon on the tool bar from the Contact Center.



The following functions can be accessed from the Quick Menu:

- Manage Critical Customer
- Maintain Relationship Plans
- Order Capture (Order Quoting - Forms)
- Search Knowledge Base
- View Customer Product
- Maintain Systems
- Contact Center
- Service Request

- Depot Repair

For the quick menu functions to work properly, you must save the folder the first time you access the quick menu. Click **Save As** and enter the appropriate folder name and save your changes. After you save your folder, select your folder name the next time you use Quick Menu. To navigate to one of the functions, double-click on the function name.

If you do not need to use some of the form functions available from the quick menu, you can remove it from the Quick Menu menu at the responsibility level. See *Oracle Customer Care Implementation Guide* for more information.

You can add additional form functions 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.

2.15 Using Oracle Scripting

Oracle Scripting provides scripted presentations designed to guide support agents through their conversations with customers. A script consists of a series of questions. When you run the script, the questions are displayed in panels. Based on the responses from the customers, the script can branch into a different series of questions. As the customer interacts with you by providing responses or by inquiring about products and services, you move to appropriate text screens providing the information needed to respond fully and accurately.

The script is typically designed to complete many of the fields required for a service request. Scripts can be integrated with forms and can also call database APIs.

Scripting can be invoked from the Tools menu or the Script Icon from the toolbar. When Scripting is invoked, a small window opens which displays a list of all the scripts that have been deployed in the database. You can select any script from the list of values and then click **Start Scripting** to run the script.

You must have Oracle Scripting installed and the script deployed in the database using the scripting Author tool before you can run scripts from the Script window. Oracle Customer Support provides a seeded script "cseccqsr" to gather the information required to create a service request.

To run the script:

1. From the Contact Center window, click on the Scripting icon on the tool bar or choose it from the Tools menu.



2. Select a script from the drop down menu for the script field.
3. Click **Start Scripting** to run the script.

The script opens a panel. The parameters that are being passed to Scripting are as follows:

- Organization Party Id
- Customer Account Id
- Organization Party Number
- First Name, if party type is Person, or Name, if party type is Organization
- Party type from header
- Caller Party Id
- Contact Point Id from header
- Interaction Id (new for 11.5.6)
- ANI number
- DNIS number

You can read the panel to the customer and record the customer response. The script then opens other panels based on the customer response recorded by you. This process continues until the last panel is reached and the script ends.

2.16 Viewing Install Base Information

Oracle Install Base is a repository of product information, location, status, party relationships, configuration, ownership, accounts, and change history for a customer product, an asset, or a software license. It offers life-cycle tracking of an item from the time that it is received, in inventory, in WIP, in projects, at customer sites, or during repair. Install Base also records a history of changes to tracked items and does so independently of their ownership, physical location, or accounting classification.

Install Base is specifically designed to track serialized and non-serialized item instances for the following:

- Tangible products
- Tangible assets
- Software
- Communications and utility services

To view installed base information:

1. Click **Installed Base** in the caller information block of the Contact Center window.
2. If no products are found, the Find Product window opens. Enter your search criteria and click **Find**.
3. The Product Summary and Details window opens, which lists all the products owned by the customer.

Open a tab to view information about the product selected in the spreadsheet at the top of the window.

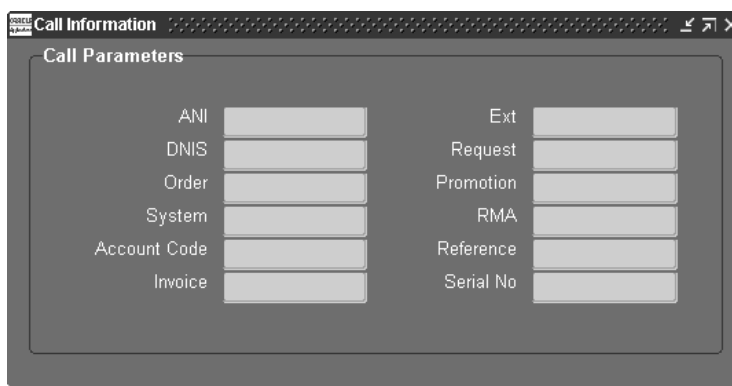
Refer to *Oracle Install Base Concepts and Procedures* for additional information.

2.17 Accessing Customer Intelligence

To access Oracle Customer Intelligence, click **Cust Intelligence** in the Contact Center. After selecting this button, a browser page opens. From this browser page, you can access business intelligence reports and graphs on the customer's loyalty, profitability, retention, etc.

2.18 Accessing Call Information:

Click **Call Information** in the Contact Center window to open the Call Information window where you can view Interactive Voice Recognition (IVR) parameters such as ANI, DNIS, Order, System, Account Code, and Service Request Number. The customer enters this information while calling for customer support.



The screenshot shows a window titled "Call Information" with a "Call Parameters" section. The parameters are arranged in two columns, each with a corresponding text input field:

Parameter	Input Field
ANI	<input type="text"/>
DNIS	<input type="text"/>
Order	<input type="text"/>
System	<input type="text"/>
Account Code	<input type="text"/>
Invoice	<input type="text"/>
Ext	<input type="text"/>
Request	<input type="text"/>
Promotion	<input type="text"/>
RMA	<input type="text"/>
Reference	<input type="text"/>
Serial No	<input type="text"/>

2.19 Activating Agent on Break

Click **Agent on Break** from the Contact Center window to signal that you are on a break and are not available to accept calls. The button label then changes to **Agent Off Break**. When you are ready to accept new calls, press **Agent Off Break** to signal that you are back from the break. If you plan to take a break, you must click **Agent on Break** before you click **End Interaction**, because clicking **End Interaction** allows new calls to reach you.

2.20 Invoking Soft Phone

If you are using Telephony Manager and Advanced Inbound, which are part of Interaction Center, you can invoke Soft Phone from the Tools menu or an icon on the Tool bar. This would be used in place of the telephone handset.

2.21 Invoking Universal Work Queue

If you are using Universal Work Queue (UWQ), you can invoke UWQ from the Tools menu or from an icon on the Tool bar. like the soft phone, this is also available as an icon on the toolbar also the Tools menu.

2.22 Wrapping up a Call

To wrap up a call, you can use the Call Wrap Up or End Interaction buttons, depending on the situation.

Use the Call Wrap Up button to open the Call Wrap Up window where you can enter additional information about the interaction with the customer. A default value is provided for outcome, result, and reason, which you can override if required. You can optionally enter additional information about the call in the Notes field, which is a new field in Release 11.5.6.

Each customer interaction results in two activities, which are displayed by default when you open the Call Wrap Up window. The first activity is the result of querying the customer. The second activity is the result of saving everything that was updated during the customer interaction.

If you want to create additional activities, click the Add New Record icon in the toolbar. Enter the details in the Outcome, Result and Reason fields and then save your work. The values in these field are defaulted from profile options and you can override them if needed.

The interaction is ended when you click **OK**. The Call Wrap and End Interaction buttons are then disabled. Pressing Call Wrap Up to end the present interaction signals that you are ready to accept new calls.

Call Wrap Up

Interaction

First Name Last Name Middle Name

Party **Business World**

Outcome **Not Available** Result ... Reason

Notes

Activities

Action	Action Item	Doc Type	Doc Number	Outcome	Result
Inquired about Item	Customer	CC	1000	Busy	Message not Sent
Updated the Item	Customer	CC	1000	Busy	Message not Sent

OK Cancel

2.23 Ending an Interaction:

Use the End Interaction button to terminate the customer interaction if there is no wrap up to be done for the call. If you click **End Interaction**, the Call Wrap Up and End Interaction buttons are disabled. Pressing End Interaction to end the present interaction signals that you are ready to accept new calls.

Ending an Interaction:

Managing Critical Customers

Oracle Customer Care allows organizations to define rules governing the criticality of their customer base. Customer Care includes a predefined profile check which flags a customer as critical. This profile check, called Critical Customers, can be modified to meet your specific needs. The agent can then initiate proper action to resolve the situation or escalate the resolution process.

The Critical Customer Management feature of Oracle Customer Care has the following functions:

- Customers can automatically become critical based on the criteria defined in the Critical Customer profile check.
- You can manually override the criticality of a customer to change a non-critical customer to a critical customer.
- You can manually override the criticality of a customer to change a critical customer to a non-critical customer.
- You can view the audit history of manual override activity for customer criticality.

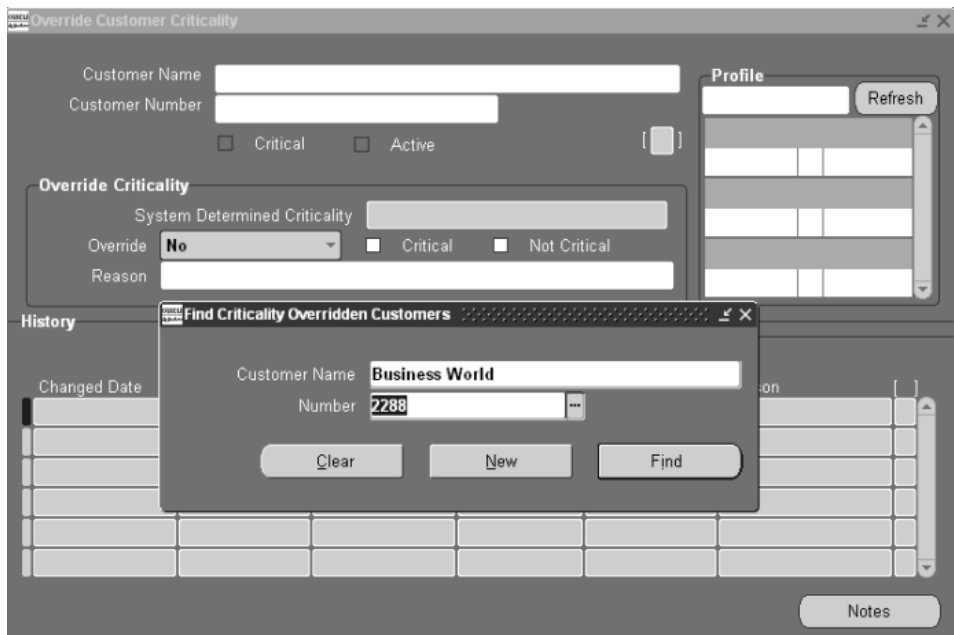
Topics discussed in this chapter are:

- [Finding Critical Customers](#)
- [Overriding the Criticality of a Customer](#)
- [Viewing Customer Criticality History](#)

3.1 Finding Critical Customers

To find a critical customer:

1. From the Customer Support responsibility, open the Find Criticality Overridden Customers window using the following navigation path:
Customer Management > Critical Customer Management



2. Enter either the customer name or number.
3. Click **Find**.
4. If the customer is flagged as being critical, details are displayed in the Override Customer Criticality window. If the customer is not flagged as being critical, the query returns no rows.

3.2 Overriding the Criticality of a Customer

You may have situations when the profile engine does not determine a customer as being critical based on the rules setup, but the customer still needs to be flagged as

critical. You can override the system-determined criticality in order to deal with temporary or exceptional situations.

To override the criticality of a customer:

1. From the Customer Support responsibility, open the Find Criticality Overridden Customers window using the following navigation path:
Customer Management > Critical Customer Management
2. If a customer has not previously been considered to be critical, click **New** to open the Override Customer Criticality window. Otherwise, query the customer.

Customer Name: Business World
Customer Number: 2288

Critical Active

Override Criticality
System Determined Criticality: Not Critical
Override: Yes Critical Not Critical
Reason: Crucial Implementation

History		Changed by		Criticality	
Changed Date	User Name	Full Name	System Determined	Manually Set	Reason

Notes

3. In the Override Criticality section, select Yes in the Override field to update a non-critical customer to a critical customer. Select No in the Override field to update a critical customer to a non-critical status.
4. Select an appropriate reason from the list of values in the Reason field.
5. Enter additional notes about this override in the Notes window. To open the Notes window, click **Notes**.

6. Enter the text of the note to further describe the customer situation.
7. Optionally select a note type from the Type list of values.
8. Select a status of Internal, External or Private.
9. Close the Notes window.
10. Save the changes you made. The changes you have made are recorded in the History region of the window.

3.3 Viewing Customer Criticality History

Use the Override Customer Criticality window to view historical audit information about whether the system determined criticality was overridden. You can view the reason for the override, the user name of the person who changed the criticality, the date when it was changed and the original system determined criticality. The history region displays only manual overrides of criticality.

Override Customer Criticality (Business World) - 1000

Customer Name: **Business World**
 Customer Number: **1000**
 Critical Active

Profile
 25-JUN-2001 00:00: Refresh
 Large Company 279447
 Y

Override Criticality
 System Determined Criticality: **Not Critical**
 Override: **Yes** Critical Not Critical
 Reason: **Crucial Implementation**

History

Changed Date	User Name	Full Name	Criticality		Reason
			System Determined	Manually Set	
22-MAR-2001 19:5	SYSADMIN	Abbott, Ms. Rache	Critical	Critical	Crucial Implementati
22-MAR-2001 19:5	SYSADMIN	Abbott, Ms. Rache	Critical	Not Critical	Crucial Implementati
22-MAR-2001 19:5	SYSADMIN	Abbott, Ms. Rache	Critical	Critical	Delicate Situation
22-MAR-2001 19:5	SYSADMIN	Abbott, Ms. Rache	Critical	Not Critical	Delicate Situation
22-MAR-2001 19:5	SYSADMIN	Abbott, Ms. Rache	Critical	Critical	Delicate Situation
22-MAR-2001 19:5	SYSADMIN	Abbott, Ms. Rache	Critical	Not Critical	Delicate Situation

Notes

Using Relationship Plans

The Relationship Plans module is used for taking proactive and reactive care of your customers. This module enhances real-time responses to customer concerns with a view to improving customer loyalty, retention and profitability.

The Relationship Plans module leverages the Events module to define complex conditions for relationship plans. It associates the outcome to real-time processes such as displaying alerts for the user, launching scripts, and running background processes for launching workflow.

Relationship plans can be defined at the customer party or account level to target the customers with greater efficiency.

Relationship plans are automatically assigned to different customers based on the plan criteria, which leverages the Customer Profile module. Customers who fulfill the plan criteria are automatically assigned the appropriate plan.

The Relationship Plan Assignment Engine handles all automatic plan assignment to the customer's plan portfolio. This engine checks all the plans that are part of the customer's plan portfolio. The engine adds new plans if they are valid for the customer. If a plan is invalid, the engine removes it from the customer portfolio. If a relationship plan is manually assigned to a customer, the Relationship Plan Assignment Engine ignores this assignment. For information about how to run the Relationship Plan Assignment Engine, refer to the *Oracle Customer Care Implementation Guide*.

Topics discussed in this chapter are:

- [Finding Relationship Plans for a Customer](#)
- [Working with Relationship Plans](#)
- [Adding and Removing Relationship Plans](#)
- [Creating a Relationship Plan](#)

- [Viewing Relationship Plan Audit History](#)
- [Viewing and Modifying a Relationship Plan](#)
- [Finding All Customers Assigned to a Relationship Plan](#)
- [Disabling a Relationship Plan](#)
- [Customizing a Relationship Plan for a Specific Customer](#)

4.1 Finding Relationship Plans for a Customer

You can perform a search to identify the relationship plans assigned to a customer's plan portfolio.

To find relationship plans:

1. From the Customer Support responsibility, open the Relationship Plans Search window using the following navigation path:

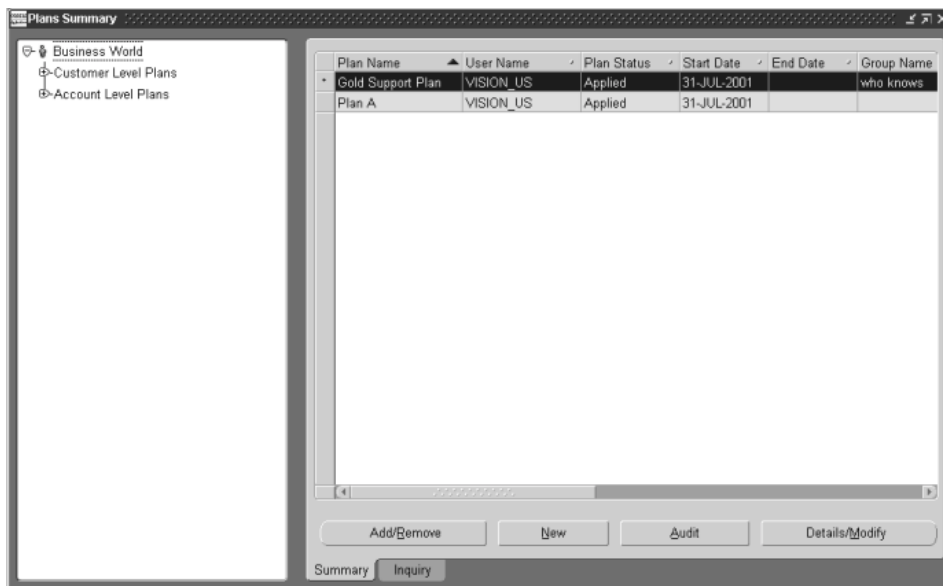
Customer Management > Relationship Plans Management

Customer Number	Customer Name	Account Number	Account Name	Plan Name
1000	World of Business123			DIRECT
1000	World of Business123	ACCT1000		&TEMPLATE
1000	World of Business123	10002	Wells Fargo	&TEMPLATE
1000	World of Business123	ACCT1000		AT&T BW
1000	World of Business123	10000	Bank of America	AT&T Plan
1000	World of Business123	10000	Bank of America	Account LeVel F
1000	World of Business123	1000	CitiBank	Account LeVel F
1000	World of Business123			Account LeVel F

2. Enter search criteria. Customer Name, Customer Number, Account Number, Account Name, Plan Name, etc. may be used as the search criteria.

If you search by Party Number, the party and all of its accounts are retrieved, with or without plans associations. If you search by Account Number, the specific account is retrieved.

3. Click **Search**.
4. Search results are displayed in the spreadsheet at the bottom of the Relationship Plans Search window.
5. Select a plan from the spreadsheet and click **OK** to view the details of the plan in the Plans Summary tab.



4.2 Working with Relationship Plans

By default, the Plans Summary tab displays the customer's plan portfolio. Customer and account level plans are depicted in the hierarchy tree in the left panel. You can expand the hierarchy to view a summary of all the plans for the customer. Select a plan from the hierarchy to view its details in the spreadsheet. To view details of all the plans for the customer, select the relationship plan from the hierarchy tree. Click on the Inquiry tab to view all the customers to whom the current plan has been assigned.

From the Plans Summary tab, you can:

- [Add or remove plans](#)
- [Create a relationship plan](#)
- [View the audit history for a plan](#)
- [View and modify details of a plan](#)

From the Plans Inquiry tab, you can:

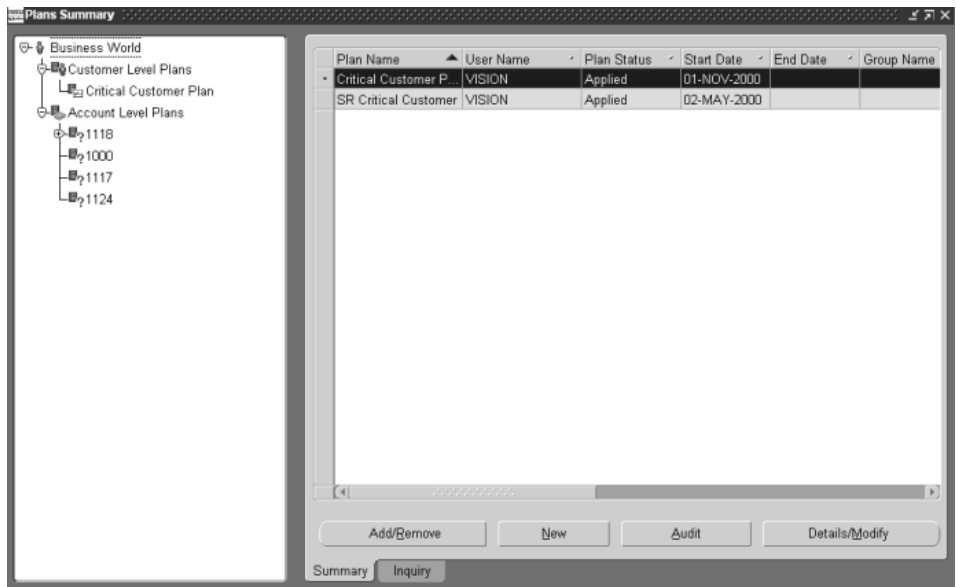
- [Find all customers to whom a current plan has been assigned.](#)

- [Disable a relationship plan](#)
- [Customize a relationship plan](#)

4.2.1 Adding and Removing Relationship Plans

To add/remove relationship plans:

1. Open the Plans Summary tab for the customer. See [Finding Relationship Plans for a Customer](#) for details.
2. Click **Add/Remove**. The Add/Remove Plans window opens.



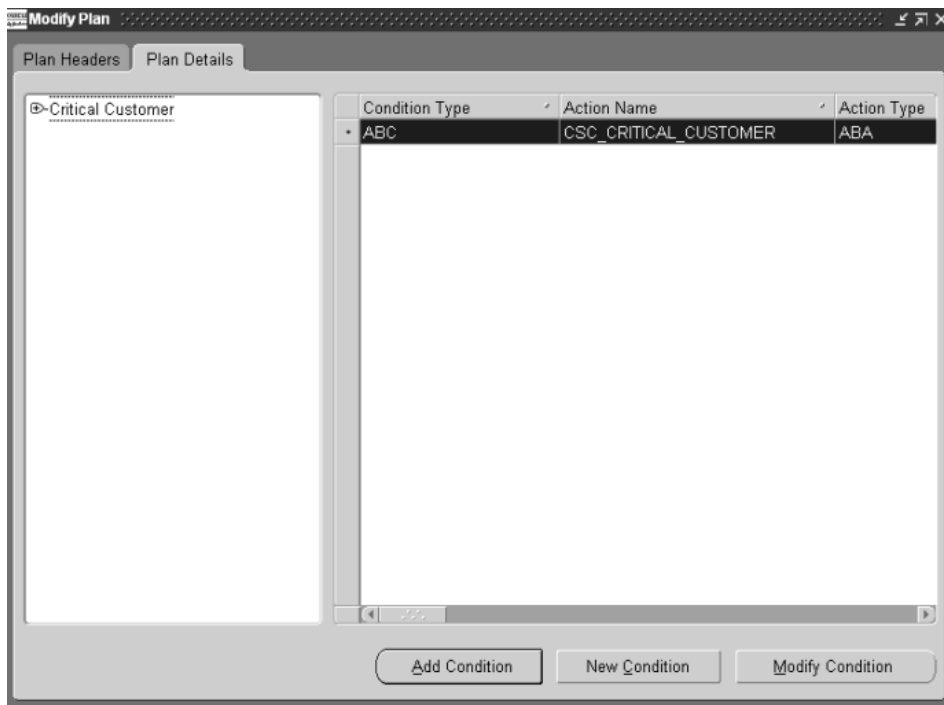
3. Click on the appropriate node on the hierarchy tree to view a list of available plans. For example, to list all customer level plans, select the Customer Level Plans node.
Plans currently assigned to the customer are listed below the selected node. Plans available to be assigned to the customer are listed in the spreadsheet.
4. To assign a plan to the customer:
 - a. From the spreadsheet, select the plan you want to assign to the customer.

The screenshot shows a window titled "New Plan" with two tabs: "Plan Headers" and "Plan Details". The "Plan Details" tab is active. The form contains the following fields and controls:

- Plan Name: Text input field.
- Group Name: Text input field.
- Start Date: Text input field.
- End Date: Text input field.
- Account Level: Check box.
- Description: Large text area with a vertical scrollbar.
- Plan Type: Radio button group with "Template" (selected) and "Custom".
- Plan Criteria: A section containing:
 - Profile Check: Text input field.
 - Low Value: Text input field.
 - High Value: Text input field.
 - Operator: Dropdown menu showing "=".

3. In the Plan Header tab, enter a name for the plan in the Name field.
4. Optionally select a group name from the Group Name list of values if you previously defined plan groups.
5. Optionally enter start and end dates for this relationship plan.
6. 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.
7. All relationship plans are initially created as a template, so the Template check box is selected by default in the Plan Type section.
8. Enter a description of the Relationship Plan in the Description field.

9. In the Plan Criteria region, 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.
10. Select an operator from the Operator list of values. The choices are =, <, >, >=, <=, Between, and Not Between.
11. Enter a low value in the Low Value field.
12. Enter a high value if you previously selected an operator value of Between or Not Between.
13. Save your relationship plan.
14. Open the Plan Details tab.



15. Click **New Condition**. The Condition window opens.

Condition (Vision Operations: USD)

Name: **Critical Customer** Effective Dates: **02-NOV-2000**

Description: [] Comments: []

Condition Type

Action Date Number of days: []

CSC_CRITICAL_CUSTOMER Before/After: []

Evaluate Once Only: Date: []

Expression Function

Seq	(Left Value	Operator	Right Value)	And/Or
10	{	[]	[]	[]	}	[]
[]	[]	[]	[]	[]	[]	[]
[]	[]	[]	[]	[]	[]	[]

Last Occurrence: **25-JUN-2001** Condition Valid: Show Condition

Outcomes Notifications

Outcomes	Enabled	Comments
CSC_CRITICAL_CUSTOMER	<input checked="" type="checkbox"/>	[]
[]	<input type="checkbox"/>	[]
[]	<input type="checkbox"/>	[]

Parameters

16. Create the appropriate condition for the relationship plan you are defining.
17. Save the conditions and close the Condition window.
18. Save the relationship plan you have created.

4.2.3 Viewing Relationship Plan Audit History

The Audit History window presents audit information for all relationship plans. It indicates when a plan was added or removed for the customer.

To view audit history:

1. Open the Plans Summary tab. See [Finding Relationship Plans for a Customer](#) for details.
2. Click **Audit**.

Plan Name	Customer Nu...	Customer Name	Account Number	Account N...	Plan...	Date
Critical Customer...	1000	Business World			Applied	02-NOV-2
Critical Customer...	1000	Business World			Removed	09-MAY-2
Critical Customer...	1000	Business World			Applied	09-MAY-2
Critical Customer...	1002	Imaging Innovations, ...			Applied	23-MAR-2
Critical Customer...	1004	Hilman and Associates			Applied	23-MAR-2
Critical Customer...	1005	AT&T Universal Card2			Applied	18-JAN-20
Critical Customer...	1648	One World Inc.			Applied	23-MAR-2
Critical Customer...	1754	Oracle CS			Applied	23-MAR-2
Critical Customer...	2068	AT&T			Applied	23-MAR-2
Critical Customer...	2068	AT&T			Removed	29-MAY-2
Critical Customer...	2088	AT & T			Applied	08-MAY-2
Critical Customer...	3212	NLS TEST 2			Applied	23-MAR-2
Critical Customer...	5976	GoodOrg			Applied	19-APR-20
Critical Customer...	7336	NEWORG11			Applied	22-MAY-2
Critical Customer...	7576	neworg2			Applied	22-MAY-2
Critical Customer...	7576	neworg2			Disabled	25-JUN-20

4.2.4 Viewing and Modifying a Relationship Plan

Plans are not customer specific. Any changes you make to a plan will be reflected for all the customers to whom the plan is assigned.

To view and modify a relationship plan:

1. Open the Plans Summary tab. See [Finding Relationship Plans for a Customer](#) for details.
2. Select the plan whose details you want to view or modify.
3. Click **Details/Modify**.
4. The Modify Plan window opens. This window displays current plan details.

The screenshot shows the 'Modify Plan' dialog box with the 'Plan Details' tab selected. The form contains the following fields and values:

- Plan Name: Critical Customer Plan
- Group Name: (empty)
- Start Date: 01-NOV-2000
- End Date: (empty)
- Account Level:
- Description: To test outcomes
- Plan Type: Template (selected), Custom (unselected)
- Plan Criteria:
 - Profile Check: Open Service Requests
 - Operator: >=
 - Low Value: 5
 - High Value: (empty)

5. If necessary, modify the information, such as the Profile Check, in the Plan Headers tab. Note that you cannot change the name of the plan.
6. If needed, open the Plan Details tab.
7. If needed, add a new condition or modify existing condition(s).
8. Save the changes you have made.

Note: If you want to stop using a relationship plan, you must inactive it by entering a date in the End Date field. You are not allowed to delete relationship plans.

4.2.5 Finding All Customers Assigned to a Relationship Plan

Use the Relationship Plans Inquiry tab to find all customers who are assigned to a relationship plan.

To find all customers assigned to a relationship plan:

1. Open the Plans Summary tab. See [Finding Relationship Plans for Customer](#) for details.
2. Click on a specific relationship plan.
3. Open the Inquiry tab. All customers assigned to this relationship plan are displayed.

Customer Nu...	Customer Name	Account Number	Account Name	Customer ID
1000	Business World			ORGANIZA
1002	Imaging Innovations, Inc.			ORGANIZA
1004	Hilman and Associates			ORGANIZA
1005	AT&T Universal Card2			ORGANIZA
1648	One World Inc.			ORGANIZA
1754	Oracle CS			ORGANIZA
2088	AT & T			ORGANIZA
3212	NLS TEST 2			ORGANIZA
5976	GoodOrg			ORGANIZA
7336	NEWORG11			ORGANIZA
7576	neworg2			ORGANIZA

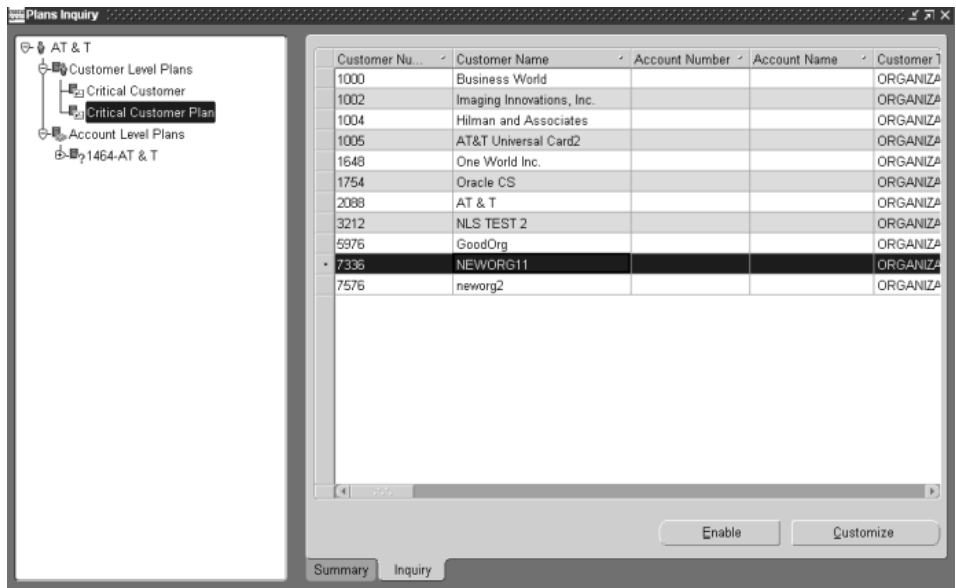
4. In the Inquiry tab, you can click **Disable** to unassign a relationship plan from a customer. See [Disabling a Relationship Plan](#).
5. In the Inquiry tab, you can click **Customize** to modify a relationship plan for a specific customer. See [Customizing a Relationship Plan for a Specific Customer](#).

4.2.6 Disabling a Relationship Plan

Disabling a relationship plan from the Plan Inquiry tab has the same effect as removing a relationship plan from a customer's plan portfolio.

To disable a relationship plan.

1. Open the Plans Summary tab. See [Finding Relationship Plans for a Customer](#) for details.
2. Click on a specific relationship plan.
3. Open the Inquiry tab. All customers assigned to this relationship plan are displayed.
4. Click on the customer name for whom you want to disable the relationship plan.
5. Click **Disable** to disable this relationship plan for the selected customer. The Status of this relationship plan for this customer changes from Assigned to Disabled. This action will appear in the Relationship Audit History.
6. If you click on this customer name again, the Disable button changes to Enable.

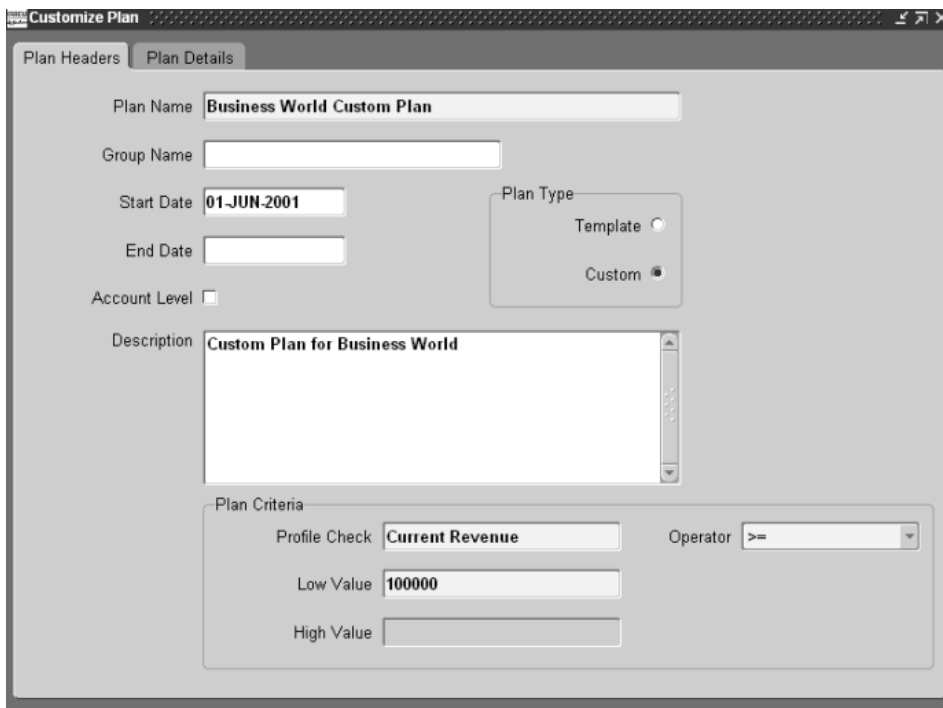


4.2.7 Customizing a Relationship Plan for a Specific Customer

Typically, when you modify a relationship plan, your changes affect all customers that have been assigned to that relationship. If you need to modify a relationship plan for a specific customer, follow this procedure.

To customize a relationship plan for a specific customer:

1. Open the Plans Summary tab. See [Finding Relationship Plans for a Customer](#) for details.
2. Click on a specific relationship plan.
3. Open the Inquiry tab. All customers assigned to this relationship plan are displayed.
4. Click on the customer name for which you want to customize the relationship plan.
5. Click **Customize**.
6. The Customize Plan window opens.



The screenshot shows the 'Customize Plan' window with the following fields and values:

- Plan Name: Business World Custom Plan
- Group Name: (empty)
- Start Date: 01-JUN-2001
- End Date: (empty)
- Account Level:
- Plan Type: Template Custom
- Description: Custom Plan for Business World
- Plan Criteria:
 - Profile Check: Current Revenue
 - Operator: >=
 - Low Value: 100000
 - High Value: (empty)

7. You must enter a unique name in the Plan Name field.
8. In the Plan Type region, the Custom radio button is enabled.

9. Make your changes in the Plan Headers or Plan Details tab as needed. Any changes you make apply only to the relationship plan for this customer. Refer to [Viewing/Modifying a Relationship Plan](#) for an explanation of how to use the Plan Headers and Plan Details tabs.

