

Oracle® Collections

Implementation Guide

Release 11*i*

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Oracle Collections Implementation Guide, 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.

- Did you find any errors?
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Preface

Audience for This Guide

Welcome to Release 11*i* of the Oracle Collections Implementation Guide.

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

- The principles and customary practices of your business area.
- Oracle Collections

If you have never used Oracle Collections, Oracle suggests you attend one or more of the Oracle Collections 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 guide contains the information you need to implement Oracle Collections.

- Chapter 1 provides an overview of the Oracle Sales family of products as well as an overview of Oracle Collections and application features.
- Chapter 2 gives an overview of the technology stack used by the application.
- Chapter 3 lists the mandatory and conditional dependencies of the application.

- Chapter 4 provides an overview of the implementation process and the sequence of tasks.
- Chapter 5 provides detail instructions for each implementation step and lists the steps in the order in which they should be performed.
- Chapter 6 discusses how to verify that your implementation is successful.

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/>.

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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 Collections.

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 Collections 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 Collections.

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 Collections (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

Many of the implementation tasks in this guide refer to other documents.

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

Multiple Reporting Currencies in Oracle Applications

If you use the Multiple Reporting Currencies feature to record transactions in more than one currency, use this manual before implementing Oracle Collections. This manual details additional steps and setup considerations for implementing Oracle Collections with this feature.

Multiple Organizations in Oracle Applications

This guide describes how to set up and use Oracle Collections with Oracle Applications' Multiple Organization support feature, so you can define and support different organization structures when running a single installation of Oracle Collections.

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 Collections 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 Collections 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 Collections 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 Oracle8i 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.

Introduction

This chapter provides an introduction to and overview of Oracle Collections and includes the following topics:

- [Oracle Sales Family Overview](#)
- [Oracle Collections Overview](#)

1.1 Oracle Sales Family Overview

Oracle Sales is a comprehensive family of tightly integrated applications to maximize sales, increase selling effectiveness, and align sales behavior to corporate objectives across all sales channels. Oracle Sales enables the field sales force, telesales teams, resellers, partners, and web storefronts to collaborate in closing more business together as one sales team. Oracle Sales enables companies to implement flexible, customer-centric processes, not only to sell effectively and increase revenue, but also to create and enhance long-term customer relationships.

The Oracle Sales Family includes:

- Sales Online
- Field Sales Laptop/Palm/Wireless
- TeleSales
- Incentive Compensation
- Partners Online
- Sales Intelligence
- Collections

1.2 Oracle Collections Overview

Collections agents and their managers can use Oracle Collections to plan and execute collections strategies that accomplish the following:

- Identify delinquent customers
- Obtain a snapshot of the customer's past payment history
- Support standard methods of payments that will quickly resolve the delinquent situation

1.2.1 Oracle Collections Features

The following features are available in Oracle Collections:

- Financial account and transaction management
- Historical views of past delinquencies, payments, disputes, and calls
- Processing of payments by credit card or electronic funds transfer
- Processing promises to pay
- Processing of payment disputes and payment reversals
- Integration with Oracle iPayment for real-time credit card and bank EFT authorization
- Automated customer scoring and dunning process
- Coordination of payments, debits, disputes, and reversals through Oracle iPayment and Oracle Accounts Receivable
- Tracking of delinquencies, dunning activities, and broken promises in Universal Work Queue
- Reports that track collection efforts

Technology, Requirements, and Performance

This chapter discusses the architectural requirements for Oracle Collections and includes the following topics:

- [Architectural Overview](#)

2.1 Architectural Overview

Oracle Collections is built on the following technology stack:

- Dataserver (EE + InterMedia all options + Spatial), version 8.1.6.1
- WorkFlow, version 2.5
- InterMedia, version 8.1.6
- Client side RSFs, version 8.0.6
- Forms, version 8.0.6
- Reports for use with Concurrent Mgr., version 6.0.8.8
- WebDB, version 2.2.1.1
- EWT, version 3.3.6
- Perspective for Java, version 1.1 build 325
- JInitiator, version 1.1.7.27
- MS Internet Explorer, version 5.5 or later. This is the recommended browser for all HTML-based applications.
- Netscape Navigator, version 4.5

Dependency Requirements and Verification

This chapter discusses the mandatory and conditional dependencies Oracle Collections has on other products and components and includes the following topics:

- [Mandatory Dependencies](#)
- [Conditional Dependencies](#)
- [Installation and Dependency Verification](#)

3.1 Mandatory Dependencies

Oracle Collections requires the following related products and components to be installed and implemented:

- Oracle Accounts Receivable
- Oracle CRM Foundation Components including Interaction History, Resource Manager, Territory Manager, Task Manager, Notes, Fulfillment
- Oracle Universal Work Queue
- Oracle TeleSales
- Oracle iPayment is required to process credit card or bank EFT payments

3.2 Conditional Dependencies

The following applications are optional dependencies:

- Oracle Marketing Online
- Oracle Advanced Inbound

- Oracle Advanced Outbound
- Oracle Scripting

3.3 Installation and Dependency Verification

Complete installation and implementation steps as outlined in the following documents:

- *Installing Oracle Applications*
- *Oracle Applications Supplemental CRM Installation Steps*
- *Oracle System Administrator's Guide*

Create users and assign Oracle Sales Administration Responsibility and System Administrator responsibility to one or more users. All of the Oracle Collections implementation tasks can be completed using these responsibilities.

Implementation Overview

This overview of the implementation process for Oracle Collections includes the following topics:

- [Process Description](#)
- [Implementation Task Sequence](#)

4.1 Process Description

The steps needed for implementing Oracle Collections are listed in the order in which they should be carried out. When the step includes steps performed in another application such as Oracle CRM Application Foundation the relevant implementation guide is referenced.

4.2 Implementation Task Sequence

The following steps outline the necessary steps required to successfully implement Oracle Collections.

1. Implementing Oracle ERP Applications
2. Creating Locations and Organizations
3. Creating Employees
4. Defining Resource Groups
5. Setting Up Employees as Users
6. Importing Employees and Assigning Them Roles and Resource Groups
7. Setting Up CRM Foundation Notes

- 8. Setting Up CRM Foundation Interaction History**
- 9. Setting Up CRM Foundation Tasks**
- 10. Setting Up CRM Foundation Calendar**
- 11. Setting Up CRM Foundation Fulfillment**
- 12. Setting Up CRM Foundation Territory Management**
- 13. Setting Up Oracle Universal Work Queue**
- 14. Setting Up Collections Campaigns in Oracle Marketing Online**
- 15. Setting Up Scripting**
- 16. Enabling Interaction Center**
- 17. Creating Scoring Component Types**
- 18. Creating New Scoring Engines**
- 19. Adding Components to Scoring Engines**
- 20. Setting Up Dunning Plans**
- 21. Configuring Scoring Engine Components**
- 22. Setting Up Collections Aging Buckets**
- 23. Setting Up Multiple Currencies**
- 24. Setting Up Campaign Assignment And Wrap-up Administration**
- 25. Setting Up Oracle Collections System Profiles**
- 26. Enabling Web Directory Assistance**
- 27. Running Concurrent Programs**

Implementation Tasks

This chapter discusses the mandatory and conditional dependencies Oracle Collections has on other products and components and includes the following topics:

- [Section 5.1, "Overview of Implementing Oracle ERP Applications"](#)
- [Section 5.2, "Overview of Creating Locations and Organizations"](#)
- [Section 5.3, "Overview of Creating Employees"](#)
- [Section 5.4, "Overview of Defining Resource Groups"](#)
- [Part 5.5, "Overview of Setting Up Employees as Users"](#)
- [Part 5.6, "Importing Employees and Assigning Them Roles and Resource Groups"](#)
- [Section 5.7, "Overview of Setting Up CRM Foundation Notes"](#)
- [Section 5.8, "Overview of Setting Up CRM Foundation Interaction History"](#)
- [Section 5.9, "Overview of Setting Up CRM Foundation Tasks"](#)
- [Section 5.10, "Overview of Setting Up CRM Foundation Calendar"](#)
- [Section 5.11, "Overview of Setting Up CRM Foundation Fulfillment"](#)
- [Section 5.12, "Overview of Setting Up CRM Foundation Territory Management"](#)
- [Section 5.13, "Overview of Setting Up Oracle Universal Work Queue"](#)
- [Section 5.14, "Overview of Setting Up Collections Campaigns in Oracle Marketing Online"](#)
- [Section 5.15, "Overview of Setting Up Scripting"](#)
- [Section 5.16, "Overview of Enabling Interaction Center"](#)

- [Section 5.17, "Overview of Creating Scoring Component Types"](#)
- [Section 5.18, "Overview of Creating New Scoring Engines"](#)
- [Section 5.19, "Overview of Adding Components to Scoring Engines"](#)
- [Section 5.20, "Overview of Setting Up Dunning Plans"](#)
- [Section 5.21, "Overview of Configuring Scoring Engine Components"](#)
- [Section 5.22, "Overview of Setting Up Collections Aging Buckets"](#)
- [Section 5.23, "Overview of Setting Up Multiple Currencies"](#)
- [Section 5.24, "Overview of Setting Up Campaign Assignment And Wrap-up Administration"](#)
- [Section 5.25, "Overview of Setting Up Oracle Collections System Profiles"](#)
- [Section 5.26, "Overview of Enabling Web Directory Assistance"](#)
- [Section 5.27, "Overview of Running Concurrent Programs"](#)

5.1 Overview of Implementing Oracle ERP Applications

Set up Oracle Receivables according to the steps outlined in *Oracle Receivables User Guide*. Oracle Collections requires the following items to be implemented:

- Banks
- Currencies
- Aging buckets
- Lockbox
- Payment methods

5.2 Overview of Creating Locations and Organizations

Set up organizations in Oracle HRMS to record the physical locations where your employees work and all the different departments and sections which make up your enterprise. A default business organization has been set up for you, so this step is not required for sales applications to be fully operational. However, you must set up organizations if you plan to use any financial ERP application in the future.

Organizations can also help you set up security for your sales applications. For example, you can attach responsibilities with different levels of security to the

different operating units you set up as organizations. Any individuals employed in those units automatically inherit that responsibility.

See the Organization Management chapter in *Using Oracle HRMS -- The Fundamentals* for detailed setup steps and *Multiple Organizations in Oracle Applications*.

5.3 Overview of Creating Employees

You must create the individuals who will be using the sales application you are implementing as employees before you can set them up as users.

Follow the steps found in *Managing People Using Oracle HRMS Release 11i*, Chapter 1 - Employee Management, Special Information Types, Entering and Maintaining a New Person. Make sure that you enter `EMPLOYEE` in the Category field.

The navigation paths for creating employees are different depending on whether you have a full license to Oracle HRMS or a shared license.

If you have the full installation of Oracle Human Resources, a module of Oracle HRMS, you must use HR and perform this step under the HRMS Manager responsibility.

5.3.1 With Full Oracle HRMS License

Responsibility: HRMS Manager

Navigation: People > Enter and Maintain

5.3.2 With Shared Oracle HRMS License

Responsibility: Collections Forms Administrator

Navigation: CRM Foundation > Resource Manager > Maintain Employees > Employees

Note: If you have the full installation of Oracle HRMS then you cannot create employees under the Collections Forms Administrator Responsibility using CRM Foundation > Resource Manager > Maintain Employees > Employees. You will receive an error message that you must use HRMS.

5.4 Overview of Defining Resource Groups

Use this procedure to set up resource groups. Resource groups:

- Determine how collections information is aggregated in reports.
- Are one of the factors that control the access by managers to collections information maintained by their subordinates.

If you want managers to access collections activities created by their subordinates, then you must set up a hierarchy of resource groups that mirrors your collections organization.

You can have multiple employees in one group. An employee in a group with the role of manager automatically becomes the manager of the other employees in that group and of the employees in the groups below in the hierarchy.

Note: You must not assign more than one employee with the role of Manager per group. Doing so will impact the reporting accuracy.

Login

Oracle Self Service Web Applications

Responsibility

Collections Forms Administrator

Prerequisites

You must have CRM Resource Manager responsibility.

You must be defined as a resource.

Steps

1. Navigate to **Resource Manager > Maintain Resources > Groups**.

The Define Groups window appears.

2. To find an existing resource group:
 - a. Click **Find** on the application toolbar to open the Find Group window.
 - b. Select a group name from the list of values in the Group Name field and click **Find**. The application populates the Results section with the group name search results.

- c. Select a group name in the Results table and click **OK**. The application populates the Define Groups window with the group information.
 3. To create a new group:
 - a. Enter a group name in the Group Name field.
 - b. Enter a brief description of the group in the Group Description field.
 - c. Enter the effective dates for the group in the **Start** and **End** fields.

Tip: To create a hierarchy of groups, start at the bottom or the top of the hierarchy. This will make it easier to link each group to the parent group or to its child groups.

4. For each group in the hierarchy:
 - a. Enter the group name.

Note: If the window is not blank you can create a new record by clicking **New** on the toolbar.

 - b. Enter an optional description.
 - c. On the Parent Groups tab, enter the group, if any, that is above the current group in the group hierarchy.

Note: You need not enter both parent and child groups. If you build your hierarchy by entering parent groups, then you need not enter child groups and vice versa. The missing groups are supplied by the application automatically.

- d. On the Child Groups tab, enter the groups that are below the current group in the group hierarchy.
 - e. On the Usages tab, use the LOV to enter **Collections**. You must make this entry for the group to be recognized by Oracle Collections.
 - f. Click **Save** on the toolbar.

Guidelines

- If a managers have their own delinquencies, then they should be part of their own groups.
- Use the Relations tab to relate Parent Groups

Reference

For more information on using Resource Manager see *Oracle CRM Foundation Components Concepts and Procedures, Release 11i, Using Resource Manager, Defining Resource Groups*.

5.5 Overview of Setting Up Employees as Users

Use this procedure to set up individual employees as users for your application.

Login

Oracle Self Service Web Applications

Responsibility

System Administrator

Prerequisites

None

Steps

1. Navigate to **Security > User > Define**.

The Users window appears.

2. Enter a user name and password. You are asked to reenter the password a second time.
3. Use the Person List of Values (LOV) to select the employee that will be using the user name and password.
4. Assign one or more responsibilities to the user. The available responsibilities are:
 - Collections Agent
This responsibility has access to eBusiness Center, Collections window, searches, processing payments, disputing invoices, and directory assistance.

- Collections Agent HTML
This responsibility has access to reports.
 - Collections Manager
This responsibility has access to all functions available to Collections Agent plus setting aging buckets, banks, lockbox, currency, Fulfillment templates, marketing campaigns, Interaction history, Discoverer workbooks, and territories.
 - Collections Manager HTML
This responsibility has access to reports, adding scores to components, adding components to scoring engines and weighting components, creating scoring engines, enabling or disabling scoring engines, creating dunning plans, and creating scoring engines.
 - Collections Forms Administrator
This responsibility has access to system profiles, concurrent requests, Setting up directory assistance, iPayment administration, Workflow, Advanced Outbound, tasks, territories and resources.
 - Collections Administrator HTML
This responsibility has access to reports, creating scoring component types, adding scores to components, adding components to scoring engines and weighting components, creating scoring engines, enabling or disabling scoring engines, and enabling web directory assistance.
5. Click **Save** in the toolbar.

Guidelines

Although the responsibilities have the same names as the roles you will assign in the next step, they perform a different function. Responsibilities are a general feature of all Oracle applications and control what features of the application a user can access. By contrast, the roles you set up in Resource manger control what collections information users can view and modify.

5.6 Importing Employees and Assigning Them Roles and Resource Groups

Use this procedure to import employees from Oracle HRMS.

Login

Oracle Self Service Web Applications

Responsibility

Collections Forms Administrator

Prerequisites

You must set up the employees in HRMS first.

Steps

1. Navigate to **CRM Foundation > Resource Manager > Maintain Resources > Import Resources**.
The Selection Criterion window appears.
2. Select Employee from the **Resource Category** drop-down list.
3. If you are importing a single employee, then use the List of Values in the Name field. For groups of employees, search by job title, competency, or other search criteria.
4. Click **Search**.
The employees that match your search criteria appear.
5. Select the check boxes for the employees you want to import as resources into your application. The next step will assign a single role to each of the selected resources.
6. Click **Create Resource**.
The Default Values window appears.
7. Use the Role LOV to select one of the available roles to assign to the resources. Assign a role with a role type of Collections. Available roles are Collections Agent and Collections Manager.
8. Click **OK**.
The Selected Resources window appears. This window displays the list of employees about to be assigned the role.
9. If there are any employees on the list you do not want to receive this role, then deselect their Select check box.
10. Click **Save Resource**.

The Save Resource button grays out indicating that you have successfully imported the resources.

11. If you want to add additional roles to any of the employees then:
 - a. Select the employee.
 - b. Click **Details**.

The Resource window displays information about the employee.
 - c. On the Role tab, use the Role Type LOV to select Collections.
 - d. Use the Role LOV to select the role.
 - e. Add any additional role for this employee by repeating the above two steps.
 - f. Click **Save** on the toolbar and close the Resource window.
12. Assign resource groups to each employee and select the roles they are going to have in each. For each employee:
 - a. Select the employee in the Selected Resource window.
 - b. Click **Details**.

The Resource window displays information about the employee.
 - c. In the Group region of the Groups tab, use the Name LOV to assign a group to the employee.
 - d. Use the Name LOV in the Group Member Role region to select one or more roles for this employee in the group.
 - e. Click **Save** on the toolbar.
 - f. Repeat the above three steps for each group to which you want to assign the employee.

Guidelines

- Role type must be Collections or user will not be able to log into Oracle Collections. Collections managers need to have Collections roles. Seeded roles include Collections Agent and Collections Manager. You can create additional collections roles, but Oracle recommends you use the seeded roles as these are tied to Oracle Collections functionality.

- You can assign a resource to multiple groups, but a group can have only one manager. Having multiple managers in a group will cause problems with forecasting rollups.
- Managers should be assigned to their own group if they manage their own delinquencies.
- If you are moving agents from one group to another, do not remove them from their original group. Instead, click **Move** and add them to the new group. This will automatically end date their previous group membership.

Reference: *Oracle CRM Foundation Components Concepts and Procedures, Using Resource Manager*.

5.7 Overview of Setting Up CRM Foundation Notes

Oracle Notes is a CRM Foundation component which comes with a set of predefined Collections note types. You can choose whether or not you want to use the predefined set of note types and create customized note types of your own.

Refer to the Implementing Notes section of the *Oracle CRM Application Foundation Implementation Guide* for additional information about setting up Oracle Notes.

Use the following procedure to set up note types.

Login

Oracle Self Service Web Applications

Responsibility

CRM Administrator

Prerequisites

None

Steps

1. Navigate to **Notes Setup > Note Type Setup**.
The Application Object Library: Note Types Lookups window appears.
2. Define the code, meaning, and description as desired. You are only required to define a tag for a new, customized note type.
3. **Save** the record when you are finished.

Deleting an Existing Note Type

Assign an end date to an existing note type to delete it.

Mapping Note Types to a Source

When you map a note type to a source object, you limit the visible note types for that source to the defined subset of note types.

Note Types

Collections uses the following note types:

- IEX_DUNNING Collections Dunning
- IEX_PAYMENT Collection Payment
- IEX_PROMISE Collections Promise to Pay
- IEX_DISPUTE Collections Dispute
- IEX_INVOICES Collections Invoices
- IEX_REVERSAL Collections Payment Reversal
- IEX_DELINQUENCY Collections Delinquency

Notes can be associated with any object, such as a payment, an organization, a dispute, or a promise to pay.

5.8 Overview of Setting Up CRM Foundation Interaction History

Refer to the Implementing Interaction History section of the *Oracle CRM Application Foundation Implementation Guide* for information about setting up Interaction History.

Collections records the following interaction actions for Interaction History:

Action	Action Item
Payment	Reversal
Payment	Credit Card
Payment	Bank Transfer
Payment	Promise to Pay
Payment	Purchase Card

Action	Action Item
Payment	Terms
Dispute	Invoice
Dispute	Debit Memo
Dispute	Send Copy
Directory Assistance	Dial New Number
Case	Create Case
Strategy	Create Strategy
Strategy	Modify Strategy
Dunning	Dunning

5.9 Overview of Setting Up CRM Foundation Tasks

Refer to the Implementing Task Manager section of the *Oracle CRM Application Foundation Implementation Guide*. Oracle Collections functionality is limited to the following:

1. Defining Task Status (Status Transition and Rules is not supported)
2. Defining Task Priorities
3. Defining Task Types (Resource Requirements and Workflow are not supported)
4. Defining Task Templates (Dependencies and recurrences are not supported).

5.10 Overview of Setting Up CRM Foundation Calendar

Refer to the Implementing Calendar section of the *Oracle CRM Application Foundation Implementation Guide* for information about setting up calendar functionality.

5.11 Overview of Setting Up CRM Foundation Fulfillment

You must implement fulfillment if you plan to deliver collateral via e-mail to customers. Refer to the Fulfillment section of the *Oracle CRM Application Foundation Implementation Guide* for information about setting up e-mail servers as well as the electronic collateral itself.

5.12 Overview of Setting Up CRM Foundation Territory Management

Refer to the Implementing Territory Manager section of the *Oracle CRM Application Foundation Implementation Guide* for information about setting up territory management.

No separate Collections territories are available. Set up and use sales territories.

5.13 Overview of Setting Up Oracle Universal Work Queue

Refer to the *Oracle Universal Work Queue Implementation Guide* for information about setting up the Universal Work Queue and creating new nodes.

Collections has three UWQ nodes to manage delinquencies, dunning items, and broken promises.

5.14 Overview of Setting Up Collections Campaigns in Oracle Marketing Online

Refer to *Oracle Marketing Online Implementation Guide* and *Oracle Marketing Online Concepts and Procedures* for information on how to set up marketing campaigns.

5.15 Overview of Setting Up Scripting

Follow the instructions in the *Oracle Scripting Implementation Guide* and *Oracle Scripting Concepts and Procedures* to set up scripts for your agents.

5.16 Overview of Enabling Interaction Center

Follow the instructions in *Oracle Advanced Outbound Implementation Guide* and *Oracle Advanced Inbound Implementation Guide*.

If advanced outbound is installed, then set OTS: Advanced Outbound Installation to *Yes*.

5.17 Overview of Creating Scoring Component Types

The score component type consists of a PL*SQL statement that is used to quantify existing database information about a customer. A scoring component type is a PL*SQL function or a select statement that returns one integer value. Use this procedure to create a scoring component type.

Login

Use your HTML login `jtflogin.jsp` page to log in to Self Service Administration.

Responsibility

Collections Administrator HTML

Prerequisites

You must know how to write PL*SQL statements and functions.

Steps

1. Navigate to **Administration > Collections > Score Components**.
A list of existing score component types appears.
2. Click **Create Type**.
The Create Component Type page appears.
3. Enter a descriptive name for the component type.
4. In the Score Component Value field, enter a PL*SQL expression.
5. Flag the component type as active or inactive.
6. Click **Create** to save the new component type.

The new component type is ready to be added to a scoring engine.

5.18 Overview of Creating New Scoring Engines

Active scoring engines are run by Concurrent Programs to identify and categorize customers by set criteria. Use this procedure to create a new scoring engine.

Login

Use your HTML login `jtflogin.jsp` page to log in to Self Service Administration.

Responsibility

Collections Administrator HTML or Collections Manager HTML

Prerequisites

None

Steps

1. Navigate to **Administration > Collections > Scoring Engine**.

A list of scoring engines appears. One engine is supplied with Oracle Collections that cannot be removed.

2. Click **Create Scoring Engine**.

The Create Scoring Engine page appears.

3. Enter a name for the engine.
4. Optionally, enter a description.
5. Flag the scoring engine as enabled or disabled.
6. Enter beginning and end dates for the scoring engine to be active.
7. Click **Create** to save the new scoring engine.

The scoring engine is ready to be given components.

5.19 Overview of Adding Components to Scoring Engines

A scoring engine uses the PL*SQL statements contained in the components to categorize customers. Use this procedure to add components to scoring engines.

Login

Use your HTML login `jtflogin.jsp` page to log in to Self Service Administration.

Responsibility

Collections Administrator HTML or Collections Manager HTML

Prerequisites

A scoring engine must exist.

Component types must exist.

Steps

1. Navigate to **Administration > Collections > Scoring Engine**.

A list of scoring engines appears. One engine is supplied with Oracle Collections that cannot be removed.

2. Click a Score ID link.

The details for the selected scoring engine appear.

3. Click **Add Component.**

A new component row appears.

4. Use the LOV to choose a component type. You can search in the LOV by component name.

5. Add weight to the components. All component weights for a scoring engine must add up to 1.0.

6. Set the enabled flag for the component.

7. Click **Update to save the component.**

The components are ready to be scored.

Guidelines

The following three scoring values are shipped with Oracle Collections:

- Total number of delinquencies in the past 12 months
- Total amount owed (sum of all open delinquencies)
- Total number of years the customer has been doing business with the collecting organization

5.20 Overview of Setting Up Dunning Plans

Dunning plans select a category of customers based upon the customer score and send those customers to Oracle Fulfillment to be sent a specified document. Use this procedure to create a dunning plan.

Login

Use your HTML login `jtflogin.jsp` page to log in to Self Service Administration.

Responsibility

Collections Manager HTML

Prerequisites

None

Steps

1. Navigate to **Administration > Collections > Dunning**.

The dunning page displays current dunning plans.

2. Click **Create Dunning Plan**.

The Create Dunning Plan page appears.

3. Select an aging bucket line.
4. Enter a range of scores to receive the dunning document.
5. Select whether or not you want the customers called after they receive the document, and enter the number of days to wait before callback.
6. Choose the Fulfillment method to use for sending the document.
7. Choose the Fulfillment document template to use.
8. Click **Create** to save your dunning plan.

The dunning plan is included the next time the Process Payments concurrent program set is run.

Guidelines

None

5.21 Overview of Configuring Scoring Engine Components

Each component of a scoring engine uses a PL*SQL statement to convert customer database information to a value, for example, total number of outstanding invoices. Use this procedure to set ranges of values and assign a score to each. To continue with the example, a user assigns a value range of -99999 to 0 a score of 0, a range of 1-5 a score of 25, a range of 6-20 a score of 50, and a range of 21 to 99999 a score of 75.

Login

Use your HTML login `jtlogin.jsp` page to log in to Self Service Administration.

Responsibility

Collections Administrator HTML or Collections Manager HTML

Prerequisites

A scoring engine must exist and must have components assigned to it.

Steps

1. Navigate to **Administration > Collections > Scoring Engine**.

A list of scoring engines appears. One engine is supplied with Oracle Collections that cannot be removed.

2. Click a Score ID link.

The details for the selected scoring engine appear.

3. Click the link for the score component ID.

The Score Component Details page appears.

4. Starting with the lowest range of values, enter your lowest and highest value for the first range. The range of values compares with the calculated values from the PL*SQL statement in the component type. The range must be contiguous and non-overlapping. Ranges must be from -99999 to 99999.

5. Enter an arbitrary value you want assigned to every customer that scores within the value range in step 4.

6. Click **Update** to save your scores.

Your scoring engine is available to perform calculations when run with the Create Delinquencies and Score Customers concurrent program set.

5.22 Overview of Setting Up Collections Aging Buckets

Follow the instructions in *Oracle Receivables User Guide* to set up aging buckets. A profile option specifies the aging bucket used by Oracle Collections.

5.23 Overview of Setting Up Multiple Currencies

Set up multiple currencies following the instructions in *Oracle General Ledger User Guide*.

5.24 Overview of Setting Up Campaign Assignment And Wrap-up Administration

See the instructions in the *Oracle TeleSales Implementation Guide* to set up the following:

- Assign campaigns to agents
- Create outcomes, results, and reasons for call wrapup
- Link outcomes to results and reasons
- Assign outcomes to campaigns

5.25 Overview of Setting Up Oracle Collections System Profiles

Oracle applications let you set up your applications according to your company's business requirements. System profiles define how an application behaves for users.

The procedure for setting up and changing profile options is the same for all Oracle applications. For a detailed description of the procedures, refer to the *Oracle Applications System Administrator's Guide*.

Login

Oracle Self Service Web Applications

Responsibility

Collections Forms Administrator

Prerequisites

None

Steps

1. Choose **Oracle Sales Setup > Profiles**.
The Find System Profile Values window appears.
2. Enter your search criteria in the Display region.
3. Click in the **Profile** Field. Enter a partial name of the profile using "%" as a wild card.
4. Click **Find**.

The found profiles are displayed in the System Profile Values window.

5. Click in the field of the profile you want to set or change.
6. Select a value from the List of Vales (LOV).
7. Click **Save** on the toolbar.

The following table lists the Oracle Collections profile names, descriptions, and applicable default values.

Table 5–1 Oracle Collections System Profile Options

User Profile Name	Affects	Description	Default
IEX: Queue: Delinquencies	Universal Work Queue	Choose yes to include delinquencies in Universal Work Queue.	
IEX: Queue: Dunning	Universal Work Queue	Choose yes to include dunning in Universal Work Queue.	
IEX: Queue: Promises	Universal Work Queue	Choose yes to include promises to pay in Universal Work Queue.	
IEX: Queue Order: Delinquencies	Universal Work Queue	Enter number 1, 2, or 3 to specify the order in which delinquencies appears in Universal Work Queue.	
IEX: Queue Order: Dunning	Universal Work Queue	Enter number 1, 2, or 3 to specify the order in which delinquencies appears in Universal Work Queue.	
IEX: Queue Order: Promises	Universal Work Queue	Enter number 1, 2, or 3 to specify the order in which delinquencies appears in Universal Work Queue.	
IEX: Auto Dialing of Calls	User level	Set to yes to enable the auto dialing function for the user.	No
IEX: Auto Fulfill	Fulfillment, Transactions	Set to yes to call Oracle Foundation Fulfillment upon completion of a transaction. Fulfillment automatically sends a confirming document to the customer upon transaction completion. If set to no, agent can use Collateral to send documents to the customer.	No
IEX: Automatically Populate Grids	Collections	Set to yes to automatically populate grids upon querying. Set to no to require the Populate button to be clicked to process the query. Use no if you have large amounts of data.	
IEX: Automatically Start Interactions	Interaction	Set to yes to automatically start interaction tracking if an action is started.	Yes

Table 5–1 Oracle Collections System Profile Options

User Profile Name	Affects	Description	Default
IEX: Automatically Get UWQ Work	Universal Work Queue	Set to yes to have dunning, broken promises, and delinquencies automatically feed work to the user upon completion of work item. Set to No to require the user to return to UWQ to obtain the next work item.	
IEX: Callback Days for Broken Promise	Concurrent programs	Enter the number of days to establish a grace period after the promise date before a callback is created.	
IEX: Collections Bucket	Collections	The name of the aging bucket created in AR that you want to use for Collections.	
IEX: Collections Rate Type	Collections	You create currency conversion rate types in Oracle GL. Choose the one to use for Collections.	
IEX: Default Date Range Span	Histories, Transactions, Notes	Enter the number of days from the current date for the earliest date to be included in a search or in displayed information.	
IEX: Default Exchange Rate Type	Collections	Enter the exchange rate type from AR to be used for Collections.	
IEX: Default Payment Method	Payment	Choose the type of payment tab to appear when the user opens the Process Payments window.	Credit Card
IEX: Default Tab in Collections	Collections	Choose the Collections window tab to appear when the user first opens the Collections window.	Coll Profile
IEX: Default Transaction Type	Transactions	Enter the transaction type to be the default that is displayed on the Pay Invoices tab of the Collections window.	
IEX: Dispute Confirmation Letter	Fulfillment	Select the Fulfillment template to be sent to customer as a confirmation when a dispute is recorded. For this to work, IEX: Auto Fulfill must also be set to yes.	
IEX: Electronic Funds Transfer Payment Remittance	Payment	Specify the payment method set in AR that corresponds to this remittance type.	
IEX: Credit Card Payment Remittance	Payment	Specify the payment method set in AR that corresponds to this remittance type.	
IEX: Enable Credit Card Payment	Payment	Choose yes or no to enable the credit card tab in Processing Payments.	
IEX: Enable Electronic Funds Payment	Payment	Choose yes or no to enable the electronic transfer tab in Processing Payments.	
IEX: Enable Promise to Pay	Promise to Pay	Choose yes or no to enable the promise to pay tab in Processing Payments.	

Table 5–1 Oracle Collections System Profile Options

User Profile Name	Affects	Description	Default
EX: Invoice Fulfillment Template	Fulfillment	Enter the template to be used to send a copy of the invoice from Transaction Details.	
IEX: iPayment Payee ID	Payments	Enter your account number with the payment processing vendor.	
IEX: Maximum Promise to Pay Range	Dunning	Set the maximum number of days to wait for a promise to pay to be processed before a followup task is created.	
IEX: Payment Confirmation Letter	Fulfillment	Select the Fulfillment template to be sent to customer as a confirmation when a payment is recorded. For this to work, IEX: Auto Fulfill must also be set to yes.	
IEX: Pay Reversal Confirmation Letter	Fulfillment	Select the Fulfillment template to be sent to customer as a confirmation when a payment reversal is recorded. For this to work, IEX: Auto Fulfill must also be set to yes.	
IEX: Promise to Pay Confirmation Letter	Fulfillment	Select the Fulfillment template to be sent to customer as a confirmation when a payment is recorded. For this to work, IEX: Auto Fulfill must also be set to yes.	
IEX: Use This Score	Scoring	Select the one scoring engine to be active.	
OTS: Interaction Auto Wrapup Enabled	Interaction	When this profile is set to No, the wrap-up window appears automatically prompting users to enter the outcomes and reasons for the activity. When this profile is set to Yes, then the interaction ends automatically without the users seeing the wrap-up window.	No
OTS: Interaction Default Action	Interactions	Users must perform at least one activity for the interaction to end. If user doesn't perform any activity but ends the interaction anyway, then the application uses the default action set in this profile and the default action item from the profile OTS: Interaction Default Action Item.	Action with action id = 1 (Item Added)
OTS: Interaction Default Action Item	Interactions	The application uses the default action item set in this profile together with the default action set in the profile OTS: Interaction Default Action whenever the user does not perform an action required to wrap up an interaction.	Action item with action item id = 1 (Account)

Table 5–1 Oracle Collections System Profile Options

User Profile Name	Affects	Description	Default
OTS: Interaction Default Outcome	Interactions	This profile determines the default value of the Outcome field in the wrap-up widow. This is also the value the application uses for outcomes of interactions that are ended automatically. The application uses this value if there is no outcome associated with the campaign schedule for this interaction. If there is a campaign associated with the interaction, then the application uses the outcome for that campaign schedule.	Outcome with outcome id = 1 (No Answer)
OTS: Max Interactions Displayed	eBusiness Center	Determines how many interactions to display in the overview tab.	
OTS: Interactions -Record Media Item ID	Interactions	Interactions track different types of communications with customers including e-mails and phone calls placed via Oracle inbound and outbound telephony applications. The record includes a unique identifier for the communication. This profile determines if that unique identifier is recorded or not. This identifier is never displayed for the user.	Yes
OTS: Telesales Interaction Enabled	Interactions	If set to Yes, TeleSales records interactions after the interaction is started. A setting of No limits agents to starting and ending interactions manually.	No
OTS: Telesales Interactions On Query Enabled	Interactions	A setting of Yes starts an interaction whenever the user displays a new record. A setting of No starts the interaction only when the user updates or deletes information in a record.	No
IEX: Activity Enabled in Dispute	Interactions	If set to Yes, an interaction is started when a dispute is created. If set to no, then disputes are not tracked.	No
IEX: Activity Enabled in Payment	Interactions	If set to Yes, an interaction is started when a payment is made. If set to no, then payments are not tracked.	No
IEX: Activity Enabled in Promises	Interactions	If set to Yes, an interaction is started when a promise to pay is created. If set to no, then promises are not tracked.	No
IEX: DEBUG LEVEL	Internal use	Do not change this profile.	

Guidelines

Profile options can be set at four different levels:

- **Site:** Indicates that the profile option is set at the site level. The site level setting affects the entire database. The Value is either **Yes** or **No**.
- **Application:** Indicates that the profile option is set at the application level. When a profile option is set at this level it overrides the site level setting. The Value is either **Yes** or **No**.
- **Responsibility:** Indicates that the profile option is set at the responsibility level. The responsibility level setting affects users of a given responsibility. When a profile option is set at this level it overrides site and application level settings. The Value is either **Yes** or **No**.
- **User:** This setting affects individual users. When set, it overrides values set at the site, application, and responsibility levels. The Value is either **Yes** or **No**.

The profile options which can be used for Oracle Collections have the following prefixes:

- **OTS:** (Oracle TeleSales)
See the *Oracle TeleSales Implementation Guide* for further explanation for the OTS profiles.
- **IEX:** (Oracle Collections)

5.26 Overview of Enabling Web Directory Assistance

You set parameters that the application uses to build the URL to automatically send a query to your chosen directory assistance web site. Use this procedure to set the parameters.

Login

Use your HTML login `jtflogin.jsp` page to log in to Self Service Administration.

Responsibility

Collections Administrator HTML

Prerequisites

None

Steps

1. Navigate to **Administration > Sales > Call Center > Web Assistance**.

The Web Assistance page appears.

2. Click **Create Web Assistance**.

The Create Web Assistance page appears.

3. Using another browser window, navigate to the web directory assistance service you want to use.
4. Perform a search for any individual. For example, for John Doe in California.

Keep the page with the results open. You will need to refer to it for the rest of this procedure.

For example, navigate to www.superpages.com, select the People Pages tab, and search for John Doe in California.

The search returns a page with the following URL:

```
http://wpg2.superpages.com/wp/results.phtml?SRC=&STYPE=WS&PS=15&PI=1&WF=John&WL=Doe&T=&S=CA&search=Find&pow=0&rtd=wpg1.superpages.com
```

5. In the Proxy Host field, enter the name of your organization's proxy server.
6. In the Port field, enter the port number for the proxy server.
7. In the Search URL field, enter the part of the URL before the question mark (?).

In the SuperPages.com example, you copy and paste the following:

```
http://wpg2.superpages.com/wp/results.phtml
```

8. In the Header Constant field, enter the part of the CGI portion of the URL header that remains constant when you perform different searches.

Note: You may need to perform additional searches to determine what portion of the URL remains constant.

In the SuperPages.com example this is: `SRC=&STYPE=WS&PS=15&PI=1.`

9. In the Trailer Constant field, enter the constant part of the URL after the search terms.

In the SuperPages.com example this is:

```
&search=Find&pow=0&rtd=wpg1.superpages.com.
```

10. Enter the switch separator. The switch separator is always the ampersand (&).
11. Enter the URL separator. The URL separator is always the question mark (?).

12. Click Update.

The Web Assistance page displays the web assistance you saved.

13. Click the ID number for the web assistance you created.

The Web Assistance Details page appears.

14. Click CGI Switches.

The CGI Switch Details page appears.

15. Create each switch to include in the search. The switches are the CGI script variables used for your search criteria. Each switch is followed by an equals (=) sign. In the SuperPages.com example these are: WF, WL, T, and S. For each switch:

a. Click Create CGI Switch.

The Create CGI Switch page appears.

b. Enter the switch in the Switch Code field. The entry is case sensitive.

c. Enter a number in the Sort Order field indicating the order this switch appears in the URL.

d. Enter plus (+) for the data separator.

e. Select Y next to the search criteria related to this switch. For SuperPages.com WF is used for first name, WL for last name, T for city, and S for state.

f. Set the Enable field to Y. Any disabled switch has a corresponding disabled field on the Directory Assistance page.

g. If user entry for this switch is required by the web assistance service, then select Y for the Required field. Look on the search web page to find out what fields are required. In the SuperPages.com example last name is the required field.

h. Click Update.

The Web Assistance Details page displays the new switch.

16. After testing your settings, set Enabled to Y.

Note: You can enable only one service at a time.

17. Select yes or no for the directory assistance flag. Only one web directory can be used for directory assistance.
18. Click **Update** to save your changes.

5.27 Overview of Running Concurrent Programs

Oracle Collections includes a number of programs that perform functions on groups of records in the database. These batch programs run on the server and are called concurrent programs.

For detailed instructions for running and maintaining concurrent programs, refer to the *Oracle Applications User's Guide* and the *Oracle Applications System Administrator's Guide*.

Set up the frequency for running the following Collections sets of concurrent programs:

- Create Delinquency and Score Customer
- Process Payments

Verifying the Implementation

This chapter discusses ways you can verify that your implementation of Oracle Collections was successful and includes the following topics:

- [Oracle Collections Implementation Verification Tasks](#)

6.1 Oracle Collections Implementation Verification Tasks

Following are some tasks you can perform to verify your application is implemented and working correctly.

1. Login to Forms, choose the Collections Agent responsibility, and go to the eBusiness Center. Is the Collections tab there and accessible?
2. As a Collections Agent, navigate to Universal Work Queue. Do you see nodes for Delinquencies, Broken Promises, and Dunning?
3. As a Collections Agent, navigate to the Collections window. Can you access each of the following tabs?
 - Profile
 - Histories
 - Pay Accounts
 - Pay Invoices
 - Notes
 - Tasks

