Oracle® Sales for Communications

Concepts and Procedures

Release 11*i*

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Oracle Sales for Communications Concepts and Procedures, Release 11*i*.

Part No. A92137-01

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Oracle Sales for Communications Concepts and Procedures, Release 11*i*

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Preface

Audience for This Guide

Welcome to Release 11*i* of the Oracle Sales for Communications Concepts and Procedures.

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

- The principles and customary practices of your business area.
- Oracle Sales for Communications

  If you have never used Oracle Sales for Communications, Oracle suggests you attend one or more of the Oracle Sales for Communications 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 Sales for Communications.

This manual contains the following four chapters:

Chapter 1, "Oracle Sales for Communications: An Overview"

This chapter provides an overview of Oracle Sales for Communications and its features.

Chapter 2, "Basics of Oracle Sales for Communications"

This chapter explains the fundamentals of Oracle Sales for Communications.

Chapter 3, "Managing Customers"

This chapter explains the procedures for using Oracle Sales for Communications to manage customer information.

Chapter 4, "Working with Quotes and Orders"

This chapter explains how Oracle Sales for Communications handles quotes and orders. It also presents detailed procedures for creating and managing quotes and orders.

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.

Accessibility of Links to External Web Sites in Documentation

This documentation may contain links to Web sites of other companies or organizations that Oracle Corporation does not own or control. Oracle Corporation neither evaluates nor makes any representations regarding the accessibility of these Web sites.

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 Sales for Communications.

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 Sales for Communications 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 Sales for Communications.

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 Sales for Communications (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 TeleSales Concepts and Procedures

This guide describes how to utilize the Oracle TeleSales functionalities available as a part of Oracle Sales for Communications.

Oracle Configurator User's Guide

This guide describes how to use the capabilities of Oracle Configurator to reconfigure product bundles.

Oracle Bills of Material User's Guide

This guide describes how to create various bills of materials to facilitate the ordering of products and services by customers.

Oracle Order Management User's Guide

This guide describes how to create price lists and discounts for orders.

Installation and System Administration

Oracle Applications Concepts

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

Installing Oracle Applications

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

Oracle Applications Supplemental CRM Installation Steps

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

Upgrading Oracle Applications

Refer to this guide if you are upgrading your Oracle Applications Release 10.7 or Release 11.0 products to Release 11*i*. This guide describes the upgrade process and lists database and product-specific upgrade tasks. You must be either at Release 10.7 (NCA, SmartClient, or character mode) or Release 11.0, to upgrade to Release 11*i*. You cannot upgrade to Release 11*i* directly from releases prior to 10.7.

Maintaining Oracle Applications

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

Oracle Applications System Administrator's Guide

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

Oracle Alert User's Guide

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

Oracle Applications Developer's Guide

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

Oracle Applications User Interface Standards for Forms-Based Products

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

Other Implementation Documentation

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 Sales for Communications. This manual details additional steps and setup considerations for implementing Oracle Sales for Communications with this feature.

Multiple Organizations in Oracle Applications

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

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 Sales for Communications 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 Sales for Communications 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 Sales for Communications working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8*i* server, and your hardware and software environment.

Oracl*eMetaLink*

Oracl*eMetaLink* 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 Oracl*eMetaLin*k, 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 Oracl*eMetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

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

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

About Oracle

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

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

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

1

Oracle Sales for Communications: An Overview

This chapter provides an overview of Oracle Sales for Communications and its features. This chapter covers the following topics:

- Overview of Oracle Sales for Communications
- Key Features
- Business Process Overview
- Subscription Based Selling
- Oracle Sales for Communications and Oracle TeleSales
- iStore for Communications and iStore

1.1 Overview of Oracle Sales for Communications

Oracle Sales for Communications is an integrated solution that allows communications product/service providers to streamline the sales process from lead creation to order generation. It provides a comprehensive solution for sharing information across sales channels to effectively manage and track the customer sales cycle and capitalize on up-selling and cross-selling opportunities.

Oracle Sales for Communications provides:

- Flexible telecom-specific product and service catalog.
- Comprehensive Order Management functionality, including provisioning and fulfillment.
- Seamless integration with Oracle's CRM and ERP applications through a single schema.

1.2 Key Features

This section discusses the key features of Oracle Sales for Communications.

Centralized Customer and Account Management

Customer contacts take place over the telephone, email, and the world wide web. Oracle Sales for Communications helps you manage your enterprise eBusiness Center. The eBusiness Center helps you to centralize information from all contact points and interactions by handling all inbound and outbound customer contacts.

Note: Oracle Sales for Communication extends the Oracle TeleSales application. In addition to the features discussed in this section, Oracle Sales for Communication supports all the features supported by Oracle TeleSales.

Product and Services Catalog

Products and services are defined as items in the catalog. A distinction must be drawn between hard goods (physical items) and services that need to be activated or provisioned. For example, a communications provider may sell wireless phones as well as wireless phone service. The wireless phone (the handset) is a hard good while the wireless service is not. Service providers in the communications industry sells both these product types; Oracle Sales for Communications allows you to seamlessly handle both.

Flexible Item Pricing

A product or service is initially defined as an Inventory item. You can then assign an item to a price list. This allows the item to be priced in different ways. For example, the same item may be sold to business customers and residential customers at different prices. Each price list is in a single currency.

Charge Types Specific to the Communications Industry

The products and services offered by the Communications industry can be charged on a recurring (subscription) or non-recurring (one time) basis. A recurring charge is billed periodically (for example, a wireless phone service billed on a monthly basis). A non-recurring charge is billed only once (for example, installation charges for a DSL connection).

Intuitive Interface to Handle Quotes and Orders

The Order Workbench component of Oracle Sales for Communications provides an intuitive interface to work with quotes and book them as orders. The Order Workbench may be integrated with APIs, messages and workflows to provide network reservations and resource assignments during the quote creation process.

1.3 Subscription Based Selling

In Oracle Sales for Communications, a subscription refers to the grouping of products and services with a single common termination point. Oracle Sales for Communications uses subscription keys to logically group subscription items together. A subscription key can be temporary or resolved depending on the stage within the subscription management process. During the quote creation process, a temporary subscription key allows items to be grouped together. The temporary subscription key must be resolved before booking the order.

Each subscription will have one subscription defining item and one or more subscription requiring items. A subscription requiring item must be associated with a subscription defining item in an existing quote, an open order, or in the Install Base.

Oracle Sales for Communications performs item validations within a subscription to ensure that prerequisite and conflict relationships are not violated. A prerequisite check performed during quote creation ensures that the prerequisite items are available in the current quote, an open order, or in the Install Base.

Items within a subscription may conflict. Oracle Sales for Communications uses conflict checks to avoid conflicts. Conflict checks are made against items in the current quote, open orders, and the Install Base.

1.4 Business Process Overview

The main business processes supported by Oracle Sales for Communications can effectively be categorized as being related to the following:

- Product Catalog
- Customer Contact Management
- Quote Creation
- Order Creation
- Order Management

Oracle Sales for Communications is setup and maintained by users with Administrative privileges (super users). CSRs (Customer Support Representatives) use the functionalities of Oracle Sales for Communications to support the business processes.

In a communication industry environment, the super users may be product managers, or marketing experts. They are not to be confused with the system administrator, or the database administrator.

Typically, during an interaction with a customer, the CSR has access to existing customer data. This data helps the CSR understand the products currently available at the customer's site (as well as the service contracts currently in effect). The CSR also has the option of capturing customer data with a view to creating a new customer or updating existing customer information (such as new addresses, account details, etc.).

The CSR understands and captures customer product requirements. At this time, the CSR has the opportunity to up-sell/cross-sell products, and explain about the additional mandatory items that will have to be included on the quote.

The CSR prepares a quote for the product(s) and requests the customer's approval. On receiving the approval, the quote is booked to generate an order. At this time the Order Management system takes over the process and runs a workflow that is specific to Oracle Sales for Communications.

1.4.1 Product Catalog

The Product Catalog contains all the products and services offered to customers. Products and services are first defined as Inventory items.

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

1.4.2 Customer Contact Management

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

Using Oracle Sales for Communications, CSRs can:

- Create or update customer and account information
- Add new products or services (Quotes and Orders) to a customer's account
- Change or remove existing products and services from the customer's Install Base
- Create or update a sales lead
- Qualify a sales lead into an opportunity

1.4.3 Quote Creation

Oracle Sales for Communications provides the CSR the ability to create quotes using the information on the product catalog. It indicates item relationships, and enforces the rules for creating an orderable quote.

1.4.4 Order Creation

Oracle Sales for Communications converts an orderable quote to an order. It uses specialized Order Management workflows for fulfilling an order. Oracle Sales for Communications uses Oracle Service Fulfillment Manager to provide the capability of fulfilling orders for provisionable goods. You can also integrate external provisioning systems to handle the provisioning of services. Oracle Order Management handles the shipping of physical goods.

1.4.5 Order Management

Oracle Sales for Communications enables standard order management business processes such as the following:

- Status tracking
- Cancelling orders
- Cancelling order lines
- Suspend and resume orders

1.5 Oracle Sales for Communications and Oracle TeleSales

Oracle Sales for Communications extends the Oracle TeleSales application. Hence, all the functions and features of Oracle TeleSales are also available through Oracle Sales for Communications. For detailed information on using these functions, please refer to *Oracle TeleSales Concepts and Procedures*.

The Implementation procedures for Oracle Sales for Communications closely mirror those for Oracle TeleSales. For more information on implementing Oracle TeleSales, please refer to *Oracle TeleSales Implementation Guide*.

Oracle TeleSales implements quote and order creation process using Oracle Quoting — Forms business objects. Oracle Sales for Communications enhances these business objects for the needs of the communications industry.

The features of Oracle Sales for Communications include:

- Management of subscription items: on existing quotes, in open orders, and in the Install Base.
- Handling of additional order actions: add, change, remove and reconfigure.
- Differentiation of charge types: recurring and nonrecurring.

1.6 *i*Store for Communications and *i*Store

Oracle Sales for Communications is also available as a web self-service component that extends Oracle *i*Store. *i*Store for Communications presents an interface where customers can order products and services in a self-service environment.

2 Basics of Oracle Sales for Communications

This section explains the fundamentals of Oracle Sales for Communications. Specifically, this section covers the following topics:

- Accessing Oracle Sales for Communications
- The eBusiness Center

2.1 Accessing Oracle Sales for Communications

You need to have a valid user name and password to log on to Oracle Sales for Communications. The system administrator sets up user names and passwords to ensure the security of your application environment. The user name and password are provided by your system administrator, who will also inform you of the responsibility you should select to access Oracle Sales for Communications.

2.1.1 From the Navigator

All the major functions that can be performed in Oracle Sales for Communications are accessible from the navigator. To open the eBusiness Center, choose eBusiness Center from the navigator.

2.1.2 From the Universal Work Queue

The Universal Work Queue (UWQ) provides you, the Customer Support Representative, a unified and common view of your work by simplifying multi-media access. It channels all the work items assigned to you by your supervisor and reduces the complexity of working across business channels and tasks.

All work assigned to you can be accessed and viewed through the UWQ. Media items include inbound and outbound calls, and e-mail. When you accesses the UWQ, all work items are indicated in My Work, which is the portal for selecting work. The total number of work items for each work type is shown in the Count column. When you select a work item, UWQ launches the appropriate window for the media or task. The Get Work button allows you to work within the same work type by gathering the next item to be worked on.

To access work through UWQ:

1. Log into Oracle Sales for Communications.
2. Select Universal Work Queue from the Navigator.
3. Select the work type to handle from My Work. The associated work items are shown in the right pane of UWQ.
4. Select a work item.
5. Select the Get Work button.

Note: UWQ can be accessed from the eBusiness center also. To access the UWQ from the eBusiness Center, choose the Universal Work Queue option from the Tools menu.

2.2 The eBusiness Center

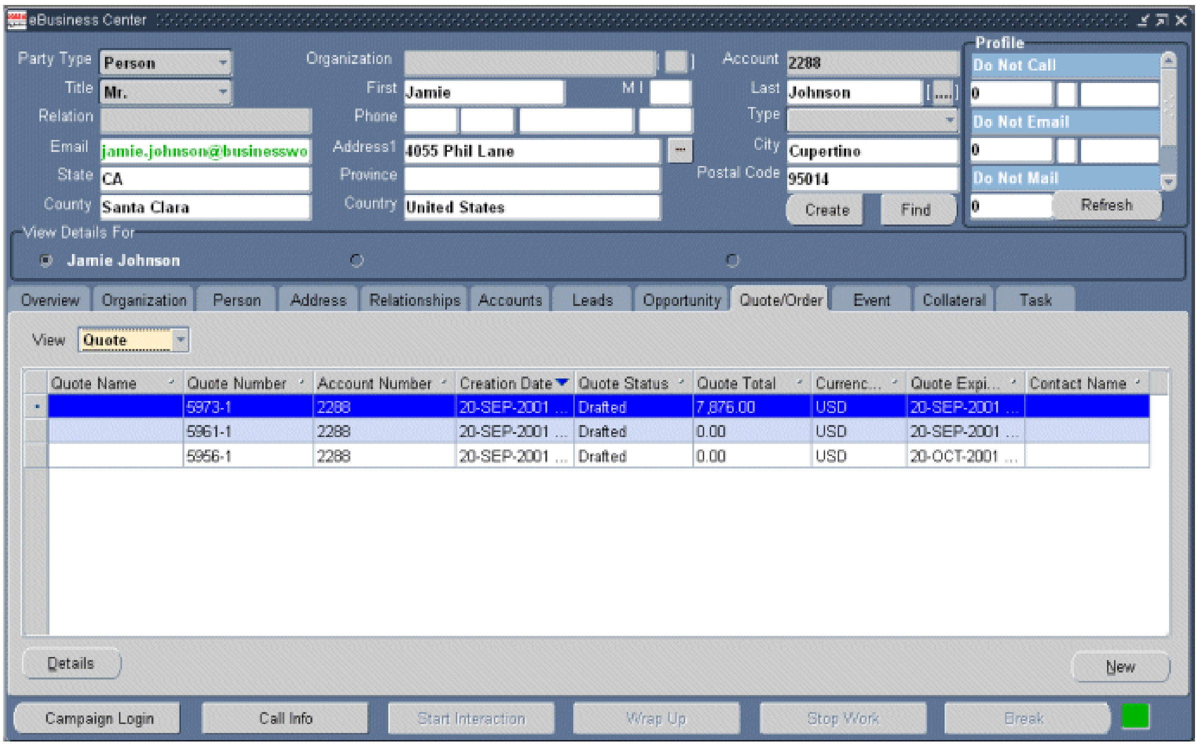
The eBusiness Center is a dynamic workspace containing a versatile set of tools for creating and managing contacts and account information for organizations and people. It is the central reaction point for a CSR who needs to respond to a customer request.

The eBusiness Center serves as a central place for creating and managing leads and opportunities as well as for collateral fulfillment and event management. Notes can be entered and viewed in the eBusiness Center for all interactions, leads, opportunities, events; and can be assigned to an organization or customer. The eBusiness Center allows a company to manage all inbound and outbound customer contacts and centralize information from all contact points and interactions.

The eBusiness Center is constructed based on the TCA 11i Customer Model, utilizing the party concept, which enables all business entities to be handled in the same way. All entities reside within the same physical table in the database. Although the entities are treated equally, each has its own distinct party type and party ID.

For example, Sam as an employee of XYZ would represent three parties: Sam the person, Sam the organization (contact for XYZ), and Sam the party relationship (sam@xyz).

An account represents a business relationship for a party. It is possible for a party to have more than one account. For more information please refer to *Oracle TeleSales Concepts and Procedures* guide.



The eBusiness Center consists of a Header region and a series of tabs. The Header region displays demographic information for the selected person, organization or party relationship. The Header region remains the same irrespective of the function you are performing.

Radio buttons that indicate the relationship of the contact to the organization are featured in the View Details For area. The data displayed in the eBusiness Center reflects the selected view. A number of tabs are available immediately below the Header region. These tabs help you access various functions.

2.2.1 Business Functions Supported by the eBusiness Center

You can complete a large number of sales related operations from the eBusiness Center. These include:

- Creating and updating customer and account information
- Adding new products or services (quotes and orders) to a customer's account
- Changing or removing existing products and services from the customer's Install Base
- Creating, saving and retrieving quotes
- Placing an order using a previously saved quote
- Checking the status of an existing order

The step-by step procedures for performing these functions are described later in this document.

2.2.2 Tabs in the eBusiness Center

A total of 12 tabs are displayed below the Header region of the eBusiness Center. Each tab opens the corresponding page where you can perform a function or view data. Click a tab to open the page. For example, the Quote/Order tab opens the Quote/Order page where all the quotes and orders that have been generated for the selected party type are listed. You can double click a quote or order to view its details.

The control region does not change as you switch between tabs. However, the data may be updated based on the function you are performing.

The tabs available from the eBusiness Center are briefly explained in the following paragraphs:

Overview tab

This tab allows you to view campaign information, launch scripts, notes, and interactions that pertain to the organization or contact. From this tab, you may add new notes for the party during an interaction.

Organization tab

This tab helps you enter and view profile information and contact points. An organization can vary in terms of business function. For example, it could be an enterprise or a not-for-profit agency.

Each organization must have a name and a primary address. It can have multiple addresses and multiple contacts associated to each address. Each time a contact for the organization is added with a new business address/phone number, that address or phone number automatically becomes a new address or phone number for the organization.

Person tab

This tab helps you view and enter a person or contact. A person or contact can be directly related to an organization or separate from an organization. It can also be used to specify contact restrictions and methods.

Address tab

This tab helps you enter additional customer address, email, phone numbers, and restrictions regarding their use.

Relationships tab

This tab helps you establish the relationship between parties. It is useful when working with a complex organization or in consumer situations, where understanding the relationship between parties is helpful in managing the customer.

Both subject and object relationships can be established using parameters such as: Object Type, Subject Type, Object Name, and Subject Name. These relationships can be between a person and an organization, a person and another person, and between an organization and a person.

Accounts tab

This tab helps you view account details and create new accounts. Account details are used to bill the customer for the products and services that are purchased.

Leads tab

This tab lets you view and manage leads. Leads are designed to capture the initial contacts with potential customers. This tab helps you gather enough information to tell a sales organization if a lead merits more sales resources, should be set aside for a later date, or abandoned entirely.

Opportunity tab

This tab helps you view and manage sales opportunities. An opportunity takes a potential sale from a qualified lead through the negotiation stage. When a qualified lead is turned into an opportunity, all of the information is automatically carried over.

Quote/Order tab

This tab helps you view, create, and update quotes and orders. Oracle Sales for Communications uses this tab extensively to generate quotes and orders.

Event tab

This tab helps you manage and coordinate events. From this tab, you can register attendees for an event, confirm or cancel registrations, enter payment information, view event history, enter contacts, search events, view related items, perform mass event registration, and access the shopping cart.

Collateral tab

This tab helps you fulfill collateral requests and manage collateral fulfillment activities to include the association of collateral to campaigns, collateral fulfillment, searching of collaterals, mass collateral requests and fulfillment, review requests, viewing of collateral history, entering of shipping information, and collateral availability.

Task tab

This tab allows you to assign tasks to leads, opportunities, contacts, and organizations. Each task is handled by the Task Manager.

Please note that the eBusiness Center, except for the Quotes/Orders tab, is common to both Oracle TeleSales and Oracle Sales for Communications. This means that these applications, for the most part, share the same set of processes and procedures. The Quotes and Order procedures in Oracle Sales for Communications are fine tuned to suit the specific requirements of the Communications Industry.

For a more detailed discussion of these tabs, and the procedures they support, please refer to the *Oracle TeleSales Concepts and Procedures Guide*.

2.2.3 Buttons in the eBusiness Center

The eBusiness Center presents a number of buttons that provide you access to frequently performed operations irrespective of the tab you are working on. Not all these buttons are available at all times since they are activated when you are using CTI. The availability of these buttons is governed by the activity you are performing.

Campaign Login

Select this button to open the Campaign Login window where you can view details of the campaigns assigned to you.

Call Info

Select this button to open the Call Information window where you can view call (IVR) parameters such as ANI, DNIS, Order, System, Account Code, Service Request Number, etc., which the customer enters while calling up for customer support.

Start Interaction

Select this button to start recording your interaction with the customer.

Wrap Up

Select this button to open the Call Wrap Up window where you can enter information about the outcome of the interaction. This will automatically end your current customer interaction.

Stop Work

Select this button to indicate that you will not be accepting any more calls (for example, due to a technical problem) though you are not on a break.

Break

Select this button to signal that you are on a break and are not available to accept calls. To resume work, press this button again.

2.2.4 Understanding the Customer Profile

Customer Profile information is displayed in the upper right hand corner of the Contact Center window. It 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 super user or system administrator, and contain a set of predefined checks. These checks are configurable, as are the actual range of values and value definitions. The check results are displayed by utilizing the Customer Profile Engine, which is a concurrent program.

The Customer Profile Engine, a part of the Customer Profile module, runs periodically to check and store changes to customer profiles. The engine is a server-side PL/SQL program which may be run as a concurrent program or by clicking the Refresh button on the Profile region of the eBusiness Center.

Double-click on a key indicator to view a summary list of that profile check. For example, double-clicking on Open Service Request (a key indicator) displays the Drilldown List showing all open service requests for the selected customer. This list displays information such as the service request number, incident date, problem code and resolution code. Double click on any line to view details of that service request. The Service Request window containing details of the service request opens. Click on the Refresh button to view the latest information for the customer.

Customer Profile displays relevant summarized information about the customer. It may contain information such as the lifetime value of the customer, critical customer status and various other attributes. The indicators are flagged by appropriate ratings and colors which give instant visual clues to the agent and enable them to engage appropriately with the customer. You can 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.

3

Managing Customers

This section explains the procedures for using Oracle Sales for Communications to manage customer information. Specifically, this section covers the following topics:

- Customer Types in Oracle Sales for Communications
- Searching for an Existing Customer
- Creating a Party Type
- Managing Customer Relationships
- Defining Contacts for an Organization
- Managing Customer Accounts

3.1 Customer Types in Oracle Sales for Communications

Oracle Sales for Communications is constructed based on the TCA 11i Customer Model, utilizing the party concept, which enables all business entities to be handled in the same way. All entities reside within the same physical table in the database. Although the entities are treated equally, each has its own distinct party type and party ID. Oracle Sales for Communications supports the following customer types:

- Organization
- Person
- Party Relationship

Organization

Party type organization defines consumers who represent a business or organization. An organization can be a business customer. Business organizations include a subsidiary or a branch of a company, an association, a church, or a government branch. An organization can have multiple contacts and addresses.

Persons

Party type person represents individual consumers who are purchasing products or services for their own use as opposed to purchasing on behalf of an organization.

A person can have multiple addresses and phone numbers. For example, a home address and multiple shipping addresses for vacation homes, friends, and relatives.

Party Relationship

Party type relationship defines consumers who are referred to as an organization. For example, Jamie Johnson, the person works for BusinessWorld, the organization. In this scenario, Jamie_Johnson@ BusinessWorld is considered a party relationship.

3.2 Searching for an Existing Customer

When a customer contacts you for procuring a product or service, you may want to start by searching the database to see if the customer details have already been captured during a previous interaction. From the Universal Search window, you can perform a basic or advanced search to find details of your party type.

On executing a search, the party record(s) matching your search parameters are displayed in the results area of the Find window. You can select any of the retrieved service requests and then click OK to view its details in the eBusiness Center.

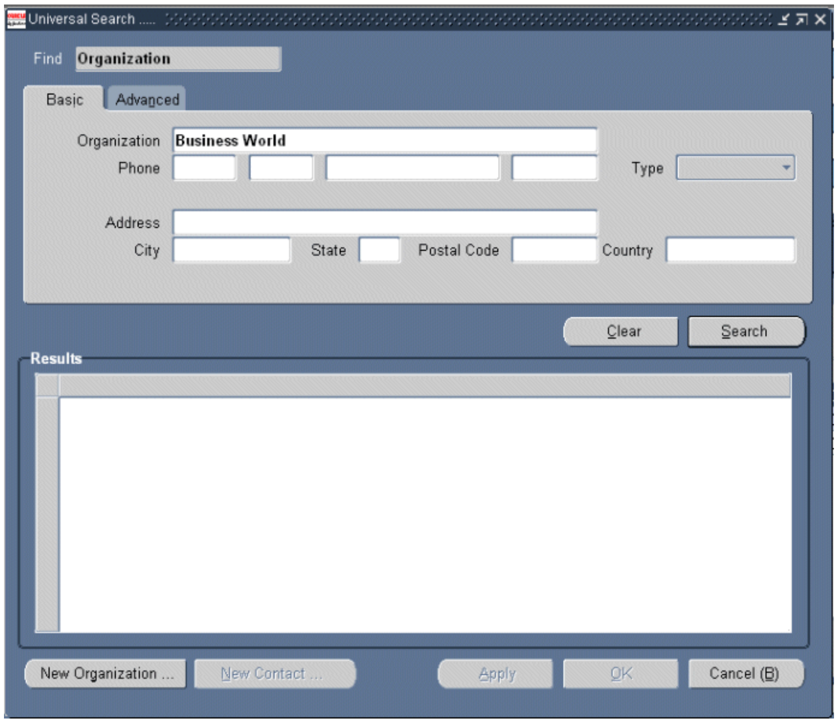
If the search does not return a customer record, you will need to create the customer as a new contact from the eBusiness Center or from the Creation of Party window.

3.2.1 Basic Search

Basic search helps you retrieve party data based on parameters such as first name, last name, customer id, address, phone number, and city. Use a combination of these parameters to refine your search so as to retrieve only the data you want.

To run a basic search for customer record:

1. Open the eBusiness Center.
2. In the Party Type field, select the customer type appropriate for the current customer. Note that this selection is carried over to the Universal Search window. You cannot change the party type from the Universal Search window.
3. Select the Find button to open the Universal Search window.



4. On the Basic tab, Select the parameters based on which you want to search for party data.
5. Select the Search button.

3.2.2 Advanced Search

Advance Search enables you to specify a number of logical arguments or conditions based on which the party data is to be retrieved. The fields available on the Universal search window vary depending on the party type for which you are searching.

Please note that the Advanced tab of the Universal Search window uses a different terminology than the eBusiness Center to identify party types. This is indicated in the following table.

Table 3-1 Party Types usedin Advanced Search

Party Type in eBusiness Center	Corresponding Party Type on Advanced Tab
Person	Consumer
Party Relationship	Business Contact
Organization	Organization

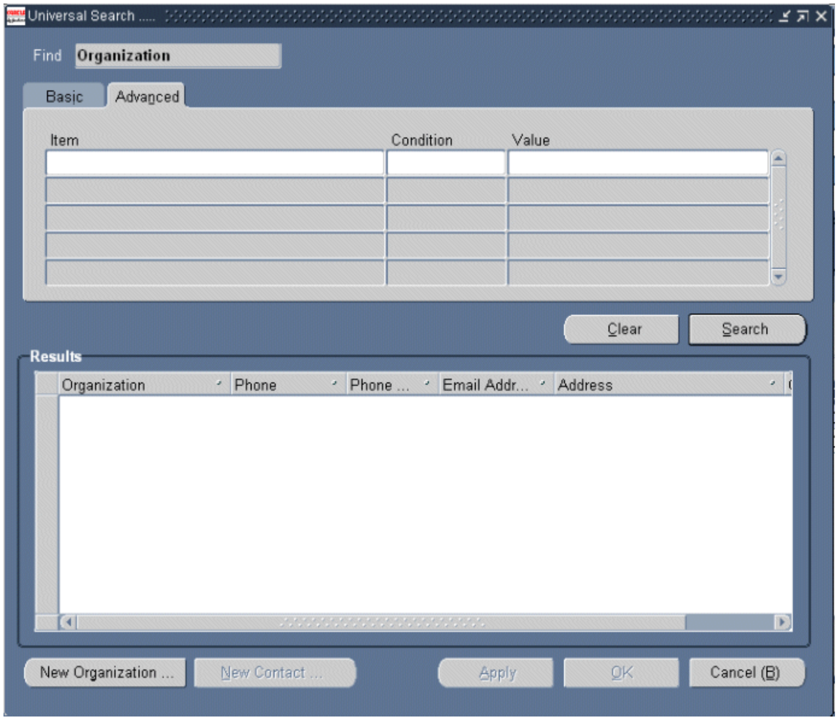
You may build your arguments around items such as first name, last name, customer id, address, phone number, and city. You will also need to select a logical operator and enter the value based on which party data is to be retrieved. The logical operator dictates how the item and value combination will be used to retrieve party data.

Each item, condition, and value combination is considered an argument. The AND operator is used in the background to create a complex argument if more than one condition is defined.

Use the Advanced tab on the Universal Search window to define logical condition(s) based on which party information is to be retrieved.

To perform an advanced search for customer record:

1. Open the eBusiness Center.
2. In the Party Type field, select the customer type appropriate for the current customer. Note that this selection is carried over to the Universal Search window. You cannot change the party type from the Universal Search window.
3. Select the Find button to open the Universal Search window.
4. Open the Advanced tab.



5. Select appropriate parameters to create the logical condition based on which the party type is to be retrieved. The parameters you will need to select to construct the logical condition for the search will depend on the party type you are searching for. For example, you will need to specify the following values to construct the logical condition while performing an advanced search for a person (consumer):

   - Item: Any of the attributes have defined for the person (first name, last name, postal code, phone, etc.). Some of these attributes (Address1, Phone: Number, and Email Address) may be unique and can be used to search for details of a specific party type.
   - Condition: The logical operator to be used for creating the search criterion.
   - Value: The value to be used to create the search criterion.

6. Click the Search button.

3.3 Creating a Party Type

When a new customer contacts you to procure a product or service, you will need to capture customer details with a view to booking and tracking the customer's orders, marketing other products to the customer, etc. You can use this data for marketing campaigns. Accurate customer data thus becomes essential for ensuring customer satisfaction and the success of your organization.

Oracle Sales for Communications provides you two interaction points from where you can create party types: the eBusiness Center, and the Creation of Party window. While these interaction points are visually different, they capture essentially the same information about your party type.

3.3.1 From Creation of Party Window

When a customer contacts you to procure a product or service, you may want to start by searching the database to determine if the customer data is available. If the search does not return a customer record, you can create the customer as a new party type from the Creation of Party window, which is accessible from the Universal Search window.

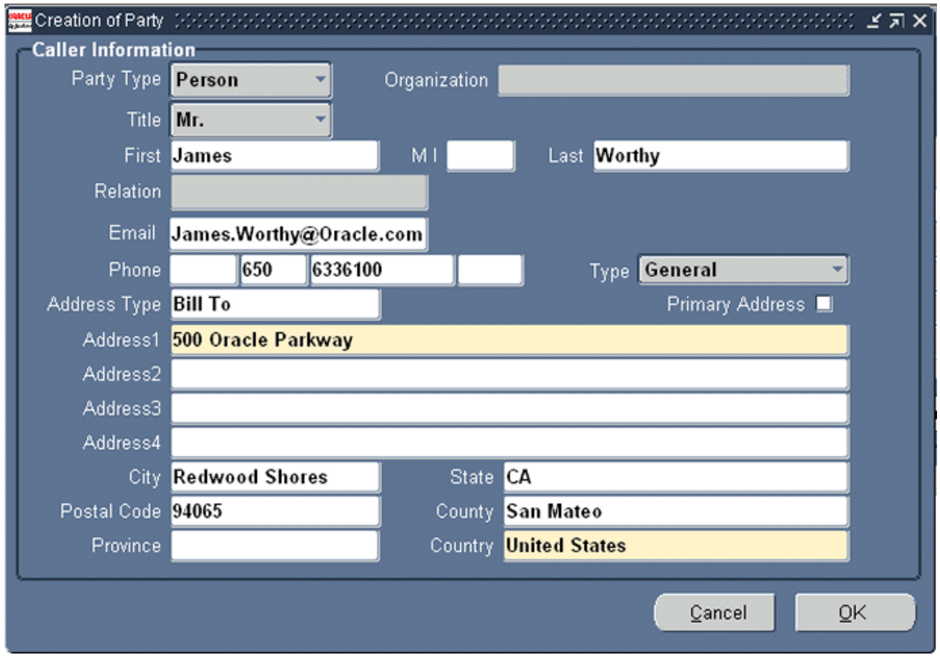
The fields available in the Creation of Party window depends on the party type you are creating.

To create a party type from the Creation of Party window:

1. From the Universal Search window, select the New Organization or the New Contact button. The Creation of Party window opens.
2. In the Party Type field select the party type you want to create. The fields available in the window will be determined by your selection in this field.
3. Enter the appropriate information in the fields. Most of these fields are self-explanatory. The mandatory information you need to enter to create the different party types are indicated in the following table. It is a good practice to enter as much customer information as possible:

Table 3-2 Mandatory Customer Information

Party Type	Mandatory Values
Person	First Name, Last Name
Organization	Organization Name
Party Relationship	Organization Name, First Name, Last Name



4. The (Phone) Type field defaults to General. Change this value if the phone number you enter is assigned to a specific purpose.

   You can enter up to four addresses for the party you are creating.

5. When you enter party address, Oracle Sales for Communications displays data in Country field. Verify that the default value is accurate for the party type. Similarly, when you enter data in the City field, the system opens the Cities window where you can select the city along with the county and state information.

6. Save the record.

3.3.2 From the eBusiness Center

You can use the Header region of the eBusiness Center to query up information on the current customer. If customer data is not available, you can create an appropriate party type.

To create a party type from the eBusiness Center:

1. Click the Create button in the Header region of the eBusiness Center.
2. In the Party Type field select the party type you want to create. If you select to create a Party Relationship, a pop-up window appears asking whether you want to create an Organization, Person, or Both.

   The fields that are available for data entry depends on the party type you are creating. For example, if you are creating an Organization, the first and last name fields will not be available.
3. Enter appropriate information in the available fields. Most of these fields are self-explanatory. The mandatory information you need to enter to create the different party types are indicated in the preceding table.
4. The (Phone) Type field defaults to General. Change this value if the phone number you enter is assigned to a specific purpose.

   You can enter up to four addresses for the party you are creating.
5. When you enter party address, Oracle Sales for Communications displays data in Country field. Verify that the default value is accurate for the party type. Similarly, when you enter data in the City field, the system opens the Cities window where you can select the city along with the county and state information.
6. Save your work.

3.4 Managing Customer Relationships

A person or organization can have numerous relationships with other persons and organizations. Oracle Sales for Communications captures these relationships with a view to understanding the consumer so as to facilitate targeted selling of products and services.

For example, we may establish relationships such as the following for Jamie Johnson:

- Jamie Johnson is an employee of BusinessWorld
- Jamie Johnson is a stockholder of Oracle Corp.
- Jamie Johnson is the spouse of Nancy Johnson.

You must establish the relationship between a person and an organization before you can assign that person as a contact for the organization.

Oracle Sales for Communications supports two types of relationships: subject relationship, and object relationship.

Subject Relationship A subject relationship identifies the relationship that a party type has to another (for example, James Johnson is an employee of BusinessWorld).

Object Relationship An object relationship identifies the relationship that a party type has to the current party type (for example, Business World is the employer of James Johnson).

Notes: You can establish relationships only between existing party types.

You can establish relationships only for the party type whose details are displayed in the eBusiness Center.

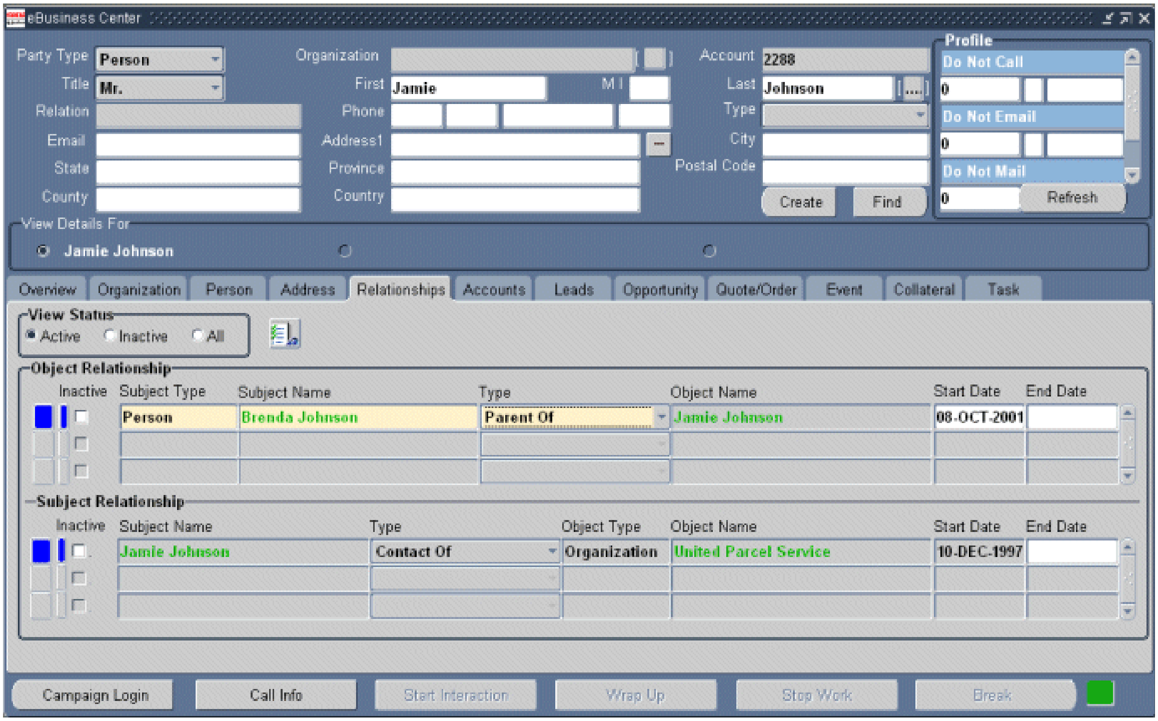
3.4.1 Establishing Relationships

Use the Relationships tab on the eBusiness Center to define the relationships for the current party type.

To establish relationships:

1. Open the eBusiness Center.
2. In the Header region of the eBusiness Center, select the party type for whom relationship is to be established.
3. Open the Relationship tab. From this tab, you can create object and/or subject relationships for the current party depending on your requirements.

   The Object Name field in object relationship defaults to the current party. Similarly, the Subject Name field in subject relationship defaults to the current party.



4. To define an object relationship in the Object Relationship region:

   a. Select the appropriate party type in the Subject Type field.

   b. In the Subject Name field, select the party to be related to the current party type. The LOV available for this field will depend on your selection in the Subject Type field.

   c. In the Type field, select the relationship that you want to define between the concerned parties. Oracle Sales for Communications allows you to define a wide range of relationships between parties, including Contact, Competitor, Board Member, Customer, Associate of, and Beneficiary.

   d. Select the End Date to indicate the period after which this relationship will be void. Enter this date if you want to establish the relationship only for a specified period of time.

5. To define a subject relationship in the Subject Relationship region:
    a. In the Type field, select the relationship that you want to define between the concerned parties. Oracle Sales for Communications allows you to define a wide range of relationships between parties, including Contact, Competitor, Board Member, Customer, Associate of, and Beneficiary.
    b. In the Object Type field, select the appropriate type of the party to which the subject relationship is to be established.
    c. In the Object Name field, select the party to be related to the current party type (displayed in the Subject Name field). The LOV available for this field will depend on your selection in the Object Type field.
    d. Select the End Date to indicate the period after which this relationship will be void. Enter this date if you want to establish the relationship only for a specified period of time.
6. Save your work.

3.4.2 Deactivating Relationships

Subject and Object relationships you have established for a customer may cease to exist over time and will need to be suitably updated. For example, the contact may no longer be working for the organization. In such cases, you may want to relate the party to the new organization where he/she is now working since Oracle Sales for Communications does not allow you to delete the existing relationship. You can also choose to deactivate the relationship, or cause the relationship to expire by setting the End Date as indicated in the preceding procedure.

To deactivate a relationship:

1. Open the eBusiness Center.
2. In the Header region of the eBusiness Center, select the party type whose relationship(s) is to be deactivated.
3. Open the Relationship tab.
4. In the Object Relationship and Subject Relationship regions, select the Inactive check box corresponding to the relationship(s) you want to deactivate
5. Save your work.

3.5 Defining Contacts for an Organization

Contacts may be considered as the de facto ordering entities that interact with your contact center on behalf of an organization. They have the power to order services and products on behalf of the organization. There can be:

- Multiple contacts for an organization, each contact associated with an address.
- Multiple contacts at the same address.
- A single contact associated with multiple addresses.
- A single contact associated with multiple organizations.

A contact should first be defined as a person in Oracle Sales for Communications. You must also establish a relationship between the person and the organization before you can define a person as a contact for an organization.

3.6 Managing Customer Accounts

In Oracle Sales for Communications you must create at least one account for your customer for billing purposes. Customer account in Oracle Sales for Communications is a device for tracking all the financial transactions of the customer. Oracle Sales for Communications allows you to create:

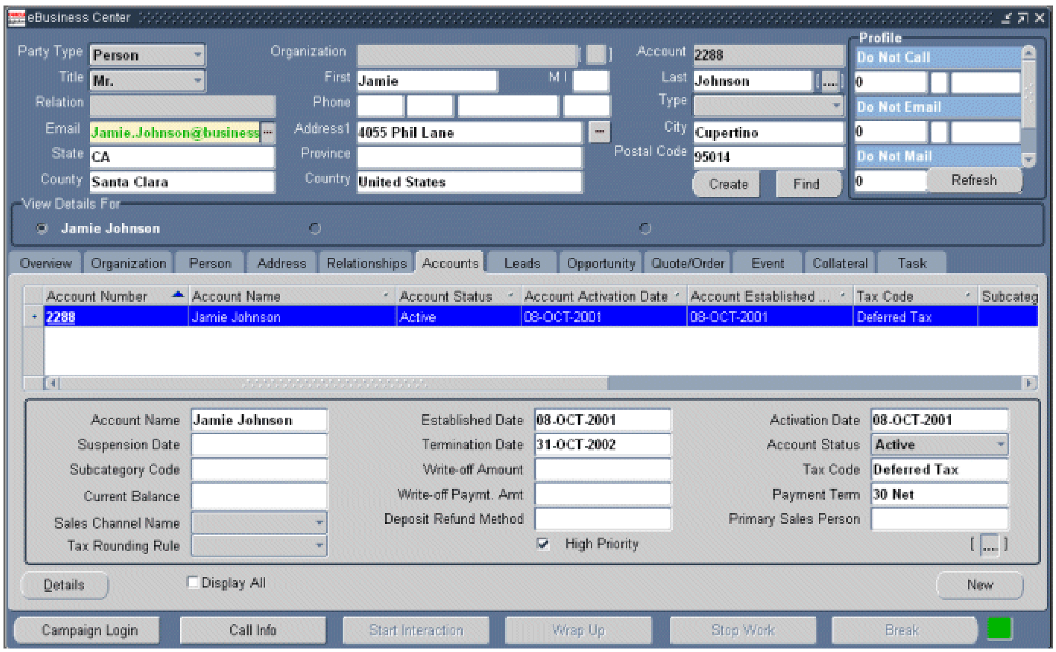
- Multiple billing accounts for a customer. For example, a customer can have a residential account for his/her personal needs and a corporate accounts (for official requirements.
- An account can have multiple contacts on an account. For example, a corporate account may be used by a number of contacts for that organization.

3.6.1 Creating an Account

The fields on the Accounts tab help you capture the basic information needed to create and maintain a customer account. The relationship between a party type and customer account is maintained through the system generated Party Id for the customer type. In addition to the basic account information, you can capture and record credit, billing preferences, roles, suspensions, sites, and relationship information for the party type. Existing account(s), if any, for the current party type is listed on the Accounts tab.

To create a customer account:

1. Open the eBusiness Center.
2. In the Header region of the eBusiness Center, select the party type for whom the account is being set up.
3. Open the Accounts tab. Existing account(s), if any, for the current party type is listed on the Accounts tab.



4. Select the New button to clear the data entry fields so that you can enter new account details.
5. Enter relevant account information. Please note that only the account status is mandatory for creating an account. However, it is a good practice to enter as much account information as possible.
6. Save the account details you have entered.

3.6.2 Maintaining Account Details

Existing account(s), if any, for the current party type is listed on the Accounts tab. This listing presents only enough information to identify the account. In addition to the basic account information you might have entered on the Accounts tab, you can capture and manage credit, billing preferences, roles, suspensions, sites, and relationship information for each account.

The relationship in the context of customer accounts is quite different from the relationships captured using the Relationships tab. Defining relationships between customers helps control payment and commitment application. You can create relationships between any customers and indicate that the relationship is either one–way or reciprocal. When you apply receipts to an invoice in a one–way relationship, the parent customer can apply receipts to the related customer's invoices, but the related customer's receipts cannot be applied to the parent customer's invoices. When applying invoices to commitments, a customer can only apply invoices to commitments that it owns or to commitments of a parent customer to which it is related. Reciprocal customer relationships allow customers to pay each other's debit items and enter invoices against each other's commitments.

To view account details:

1. Open the eBusiness Center.
2. In the Header region of the eBusiness Center, select the party type for whom account details are to be entered/viewed.
3. Open the Accounts tab. Existing account(s), if any, for the current party type is listed on the Accounts tab.
4. From the list of accounts on the Accounts tab, select the appropriate account. The fields on the Accounts tab displays relevant account information, if available.
5. Click the Details buttons. The Customer Account Details window opens. The Header region of this window displays important account information, if available. This region displays information such as account number, account name, the date when the account was established, and the account status.

   The Customer Account Details window comprises six tabs: Credit, Billing Preferences, Roles, Suspensions, Sites and Relationships. These tabs present appropriate information for the party type, if available.

- Use the Credit tab to enter/view credit information, such as credit rating and risk code.
- Use the Billing Preferences tab to capture billing preferences, such as bill type, language, and statement cycle.
- Use the Roles tab to record information on account roles (Contact and Guarantor).
- Use the Suspensions tab to capture account suspensions details, including suspension period and reasons.
- Use the Sites tab to record information on multiple sites and site uses (Bill To, Ship To, and Statement) for the account.
- Use the Relationships tab to create and maintain account hierarchy (parent and child accounts).

6. Enter or modify the data as required. For detailed information on the fields and their significance, please refer to the *Oracle TeleSales Concepts and Procedures Guide*.
7. Save your work.

3.6.3 Deactivating Accounts

By default, the status of all customer accounts are set to active to indicate that the accounts can be used for tracking the financial transactions of the related party type. Oracle Sales for Communications does not permit the deleting of customer accounts for any reason. However, you can deactivate the accounts that should not be used to track customer transaction. Please note that deactivating an account will not disconnect the product or service on the account; it would prevent future use of the account for billing purposes.

If you need to completely deactivate the account, you will need to disconnect each product or service on the account separately from the Install Base. For a detailed discussion on the process for disconnecting products/services from the Install Base, please refer to the *Install Base Concepts and Procedures Guide*.

To deactivate an account:

1. Open the eBusiness Center.
2. In the Header region of the eBusiness Center, select the party type whose account is to be deactivated.
3. Open the Accounts tab. Existing account(s), if any, for the current party type is listed on the Accounts tab.
4. From the list of accounts on the Accounts tab, select the appropriate account. The fields on the Accounts tab displays relevant account information, if available.
5. Reset the Account Status field to Inactive.
6. Save your work.

4

Working with Quotes and Orders

This chapter explains how Oracle Sales for Communications handles quotes and orders. It also presents detailed procedures for creating and managing quotes and orders. This chapter covers the following topics:

4.1 Quote and Order Management Process Flow

Oracle Sales for Communications provides comprehensive order capture capabilities for creating quotes and orders for products and services. It provides Order Management functionality for managing the business processes and rules associated with each order/order line as it moves through its life-cycle, managing interactions and dependencies between multiple delivery mechanisms and external systems.

The Order Workbench component of Oracle Sales for Communications provides an intuitive interface to work with quotes and orders. The Order Workbench utilizes enhanced workflows to enable network reservations and resource assignments.

The Order Workbench also provides:

- Access to the product catalog.
- Ability to configure packages
- View of current, past, or pending orders and quotes
- View of Install Base
- Access to provisioning functionality for the item on the order

Oracle Sales for Communications provides a clear process flow to handle customer requests for products and services. A simplified version of the events that occur when a customer calls into a Call Center to purchase a service (for example, a wireless telephone service) is depicted in the following table. As a part of this process, the CSR will go through a number of steps. These steps are presented in the following table:

Table 4–1 The Quote Process

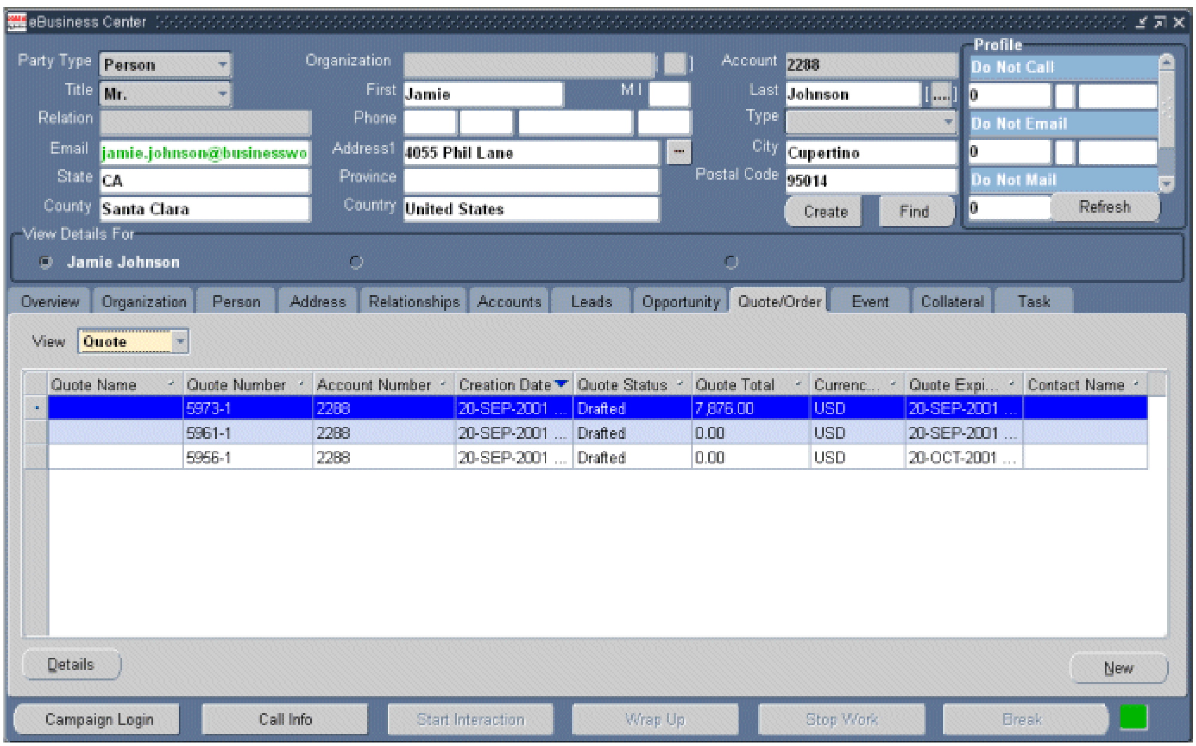
Step No.	Description
1.	Customer contacts the service center. A CSR accepts the customer interaction (routed through the UWQ)
2.	Create the customer account (for a new customer) or view customer details from the eBusincess Center.
3.	Open the Order Workbench and initiate the quote creation process by selecting the products/services that the customer wants to order. Also, identify and add the related prerequisite products and charges to the quote.
4.	Convey details of the products/services, and charges on the quote to the customer. Modify the quote to substitute products based on customer requirements.

Table 4–1 The Quote Process

Step No.	Description
5.	Obtain customer's acceptance of the quote and the charges.
6.	Enter shipping and billing details.
7.	Book the order. This would initiate the fulfilling process. A booked order will create one or more order lines, which will be processed by the Order Management system.

4.2 Understanding the Quote/Order Tab

The Quote/Order tab helps you view, create, and update quotes and orders. In Oracle Oracle Sales for Communications, this is the staging area from where you would launch the processes related to creating and maintaining quotes and orders using the Order Workbench.



Note: The Quote/Order tab in Oracle Sales for Communications is different from that in Oracle TeleSales. The process flows and workflows used by Oracle Sales for Communications in this tab enhance those used by Oracle TeleSales.

The Quote/Order tab presents a summary list of the quotes or orders of the current party type based on the filter selected for viewing the information on this tab. From this tab, you can opt to view details of an existing order or quote, or launch create a new quote/order. In both cases, the Order Workbench opens.

The list on the Quote/Order tab can be sorted using the column title as the sort criterion. For example, you can sort the list based on the quote or order number, status, etc. This helps you quickly identify the quote or order you want to work with. To sort the quotes/orders based on a column name, click the title of the column.

You can quickly open a quote or order to view its details by:

- Double clicking the anywhere in the row containing the quote/order details.
- Selecting the row containing the quote/order details and then selecting the Details button.

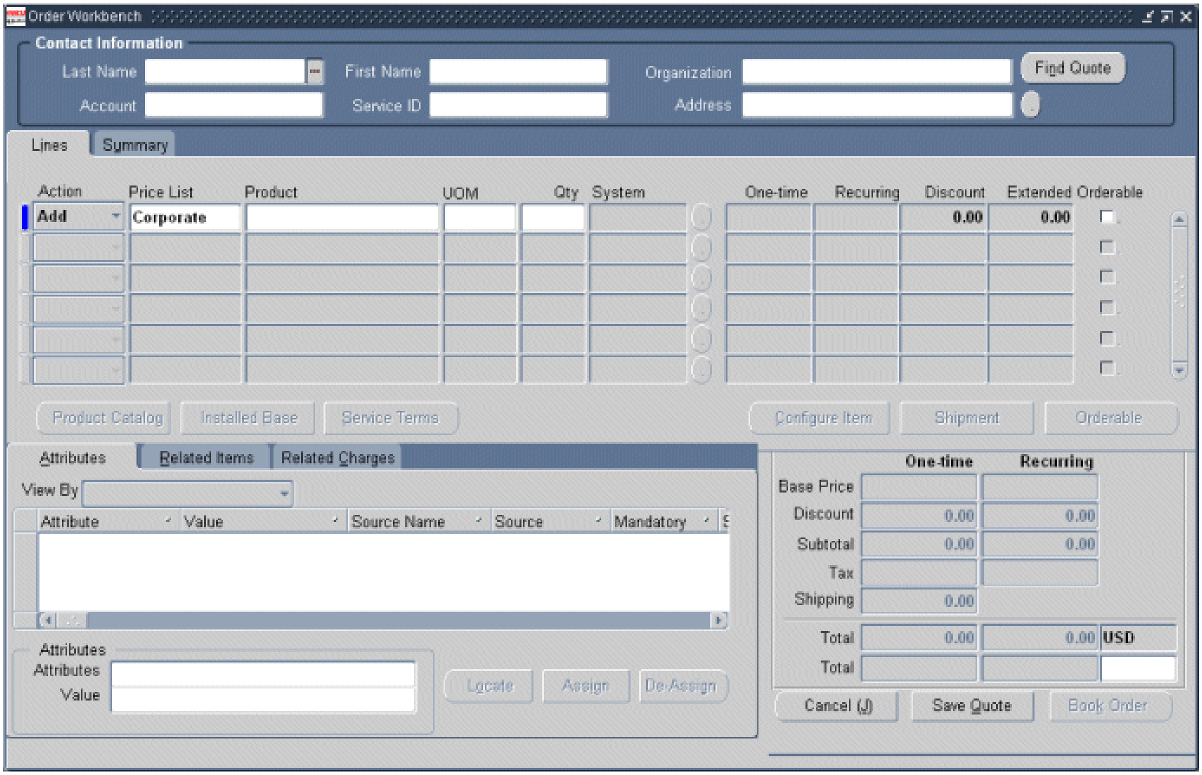
4.2.1 Opening the Order Workbench

The Order Workbench allows you to work in the same context as the eBusiness Center. It inherits relevant information (such as last name, first name, name of the organization, and account number) from the party type displayed in the eBusiness Center. Hence, it is imperative to populate the eBusiness center with data on the appropriate party type before you open the Order Workbench.

To open the Order Workbench:

1. Open the eBusiness Center and select the appropriate a party type.
2. Open the Order/Quote tab. This tab, by default, presents a summary list of the quotes for the current party type. You can view all the orders for the current party type by selecting Order in the View field.
3. If you want to view details of a quote/order in the Order Workbench, select it and then select the Details button.

   If you want to create a quote, select the New button.



Note: The procedures presented in the following pages assume that you have already opened the Order Workbench using the preceding procedure.

4.3 The Order Workbench

The Order Workbench is the focal point for creating and maintaining quotes and orders. The Order Workbench provides you a single interaction point from which you can:

- Explore the Product Catalog Navigator
- Understand the Install Base Navigator
- Find Quotes
- Create Quotes
- Select Items for Quotes/Orders
- Work with Subscription Management
- Add Configurable Packages to a Quote
- Copy an Order as a New Quote
- Copy a Quote as a New Quote
- Work with Service Term Items
- Enter Shipping Information
- Work with Related Items and Charges
- Delete Items from a Quote
- Verify that a Quote is Orderable
- Work with the Install Base
- Check Order Status

The Order Workbench provides you a unified interface from where you can Create quotes and orders, enter shipping and billing details, view Install Base for products the customer already has, view and edit service term items, and configure package items and book orders.

The Order Workbench consists of the following components:

- Contact Information Region
- Quote/Order Information Region
- Related Information Region

Contact Information Region

This region spans the top portion of the Order Workbench and contains details regarding the customer and account. The Order Workbench inherits available contact information (such as Last Name, First Name, Organization, Account, Service ID, and Address) from the party type selected in the eBusiness Center.

Quote/Order Information Region

This region comprises two tabs—Lines and Summary—that display details of the selected quote or order lines. It also provides access to Product Catalog Navigator, Install Base, and Service Contracts.

Lines Tab This tab lists the quote lines. The Lines tab includes the products and services on the given Quote or Order. From this tab you can access the Product Catalog Navigator, Install Base, and Service Contracts. You can also configure package items and enter shipping information for individual order lines from this tab.

Summary Tab This tab presents information such as quote number, billing address and payment details. Billing address information applies to all order lines unless otherwise specified on the individual order line. Payment information applies to the entire order.

Related Information Region

This region comprises the Attributes, Related Items, and Related Charges tabs that appear below the Lines tab. These tabs display information based on the current item selected in the Lines tab.

Attributes Tab This tab lists the fulfillment attributes for the product. You may need to capture values for these attributes.

Related Items Tab This tab lists all the items that have been defined as being related (for example, substitute, cross-sell, upsell, etc.) to the current item. It indicates information such as the relationship of the related item to the current item, price list, list price, currency code, unit of measure, etc. for each related item.

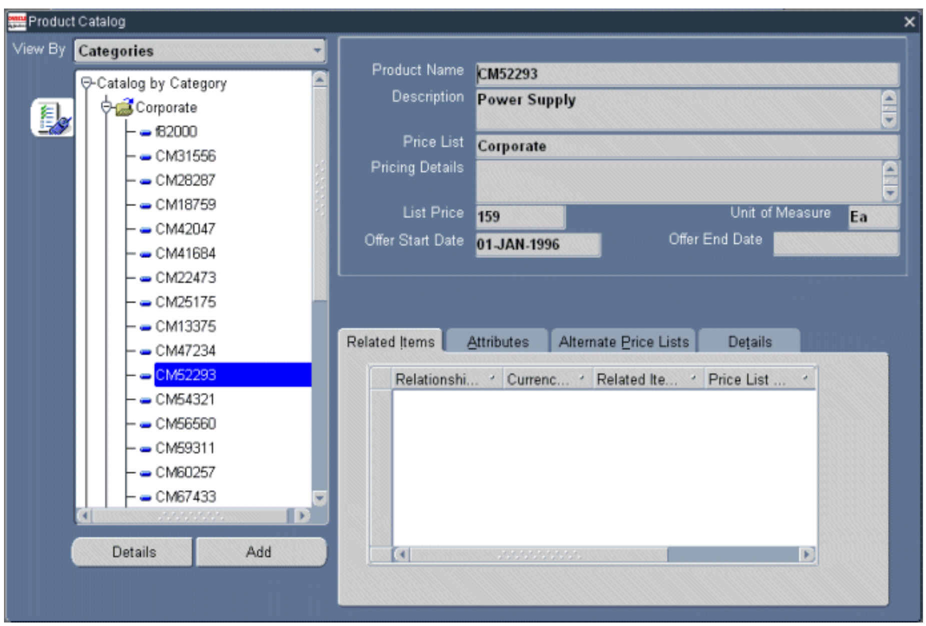
You can examine the related item list on this tab and inform the customer about the prerequisite item(s) and substitute items so that the customer can make an informed decision while purchasing products.

Related Charges Tab This tab lists the additional charges that will be incurred on purchasing the current item. Additional charges may include charges that are not tied directly to the price of the product (for example activation charges). Related charges should be included in the final quote/order amount.

4.4 Understanding the Product Catalog Navigator

The Product Catalog Navigator provides a graphical interface for creating quotes. It comprises three distinct regions: a navigation tree, product details, and related information.

The Product Catalog Navigator allows nodes to be expanded or collapsed. Each node in a tree may have subnodes. When such a node is collapsed, a '+' symbol appears to its left to indicate that it contains sub nodes. Expanded nodes are indicated with a '-' symbol to the left of the node. Click on the '+' symbol to expand the node and the '-' symbol to collapse the node.



The navigator presents a hierarchical view of the product catalog. For example a typical hierarchy in the Product Catalog Navigator depicts the Catalog as the top most node, the different product categories as sub nodes. Price lists are displayed as the sub nodes to categories. Items appear as the lowest level nodes.

The product catalog navigator presents a tree structure comprising categories, price lists and items so that you can easily identify and select items for the quote you are preparing.

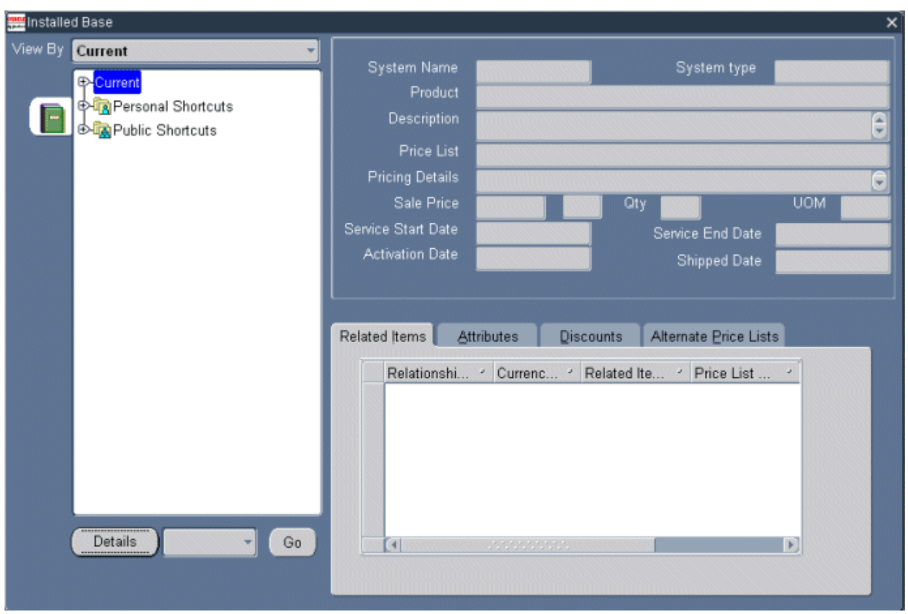
The View By filters allow you to change the display in the Product Catalog Navigator. By default, the navigator tree displays items based on the category it belong to. The display shows Category as the top node followed by Price List and Items, in that order.

Use the All Pricelists filter to view catalogs based on the pricelists they use. The display shows all the price lists available in Oracle Sales for Communications and the items assigned to the pricelist.

The Details button and the Add buttons on the Product Catalog Navigator can be used only after selecting an item (the lowest level node) from the navigation tree.

4.5 Understanding the Install Base Navigator

The Install Base Navigator provides a graphical interface for viewing Install Base details and selecting products in the Install Base during the quote generation process. It comprises three distinct regions: a navigation tree, product details, and related information.



The navigator allows nodes to be expanded or collapsed. Each node in a tree may have subnodes. When such a node is collapsed, a '+' symbol appears to its left to indicate that it contains sub nodes. Expanded nodes are indicated with a '-' symbol to the left of the node. Click on the '+' symbol to expand the node and the '-' symbol to collapse the node. The navigator presents a hierarchical view of the Install Base.

Items in the Install Base are grouped by subscription. Oracle Sales for Communications allows you to view details of the items in the Install Base. It also allows you to change, remove and/or reconfigure the items in the Install Base.

4.6 Finding Quotes

Customers would, after suitable modifications, consent to purchase items on the quote. However, there may be situations when the customer may postpone that decision until later. In such cases, you can save the quote so that it can be used later.

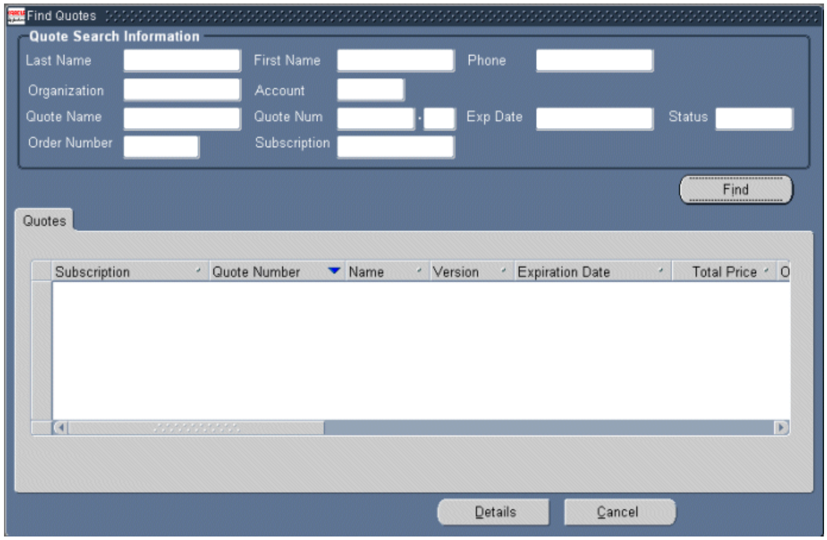
All the quotes that have been generated for a customer can be viewed from the Quote/Order tab. You can sort the quotes listed on this tab by clicking on the column header.

In addition to the sort mechanisms on the Quote/Order tab, you can use the Find Quote button on the Order Workbench to open a quote without closing the Order Workbench. For example, you already have a opened a quote from the Order Workbench, but have realized since that you have opened the wrong quote, or need to view details of another quote for the same party type.

To search for an existing quote from the Order Workbench:

1. In the Order Workbench, select the Find Quote button. The Find Quotes window opens.
2. In the Find Quote window, enter the appropriate search parameter(s). You can use one or more parameters to identify quotes.

   The Find Quotes window provides a number of parameters based on which you can retrieve quotes. Note that some of these parameters uniquely identify a quote or order and can be used to retrieve specific quote/order. For example, you can search for a specific quote by using Quote Number as the search parameter; similarly, you can find a specific order by using Order Number as the search criterion.



3. Select the Find button. The quote(s) or order(s) identified by the search are listed in the spread table on the Find window.

4. To display a quote or order in the Order Workbench, select it and then click the Details button.

4.7 Creating a Quote

A customer call soliciting information on the price and availability of a product or item may be construed as a request for quote. A quote is the supplier's response to that request. In an Oracle Sales for Communications scenario, you will have to respond to the customer's queries and prepare quotes based on them. Generally, customers would immediately consent to purchasing the items on an acceptable quote. However, there may be situations when the customer may postpone that decision until later. In such cases, you can save the quote so that it can be used later.

To create a quote:

1. Open the Order Workbench.
2. Based on the information provided by the customer, select:
   - The item(s) for the quote.
   - Prerequisite items, if any.
   - Related charges that need to be added.
3. Enter shipping details.
4. Check for provisioning attributes, if needed.
5. Verify that the quote is orderable
6. Book the quote as an order by selecting the Book Order button on the Order Workbench.

See Also:

- Understanding the Product Catalog Navigator
- Adding Configurable Packages to a Quote
- Copying an Order as a New Quote
- Copying a Quote as a New Quote
- Entering Shipping Information
- Deleting Items from Quote
- Working with the Install Base
- Checking Order Status

4.8 Selecting Items for Quotes/Orders

Oracle Sales for Communications provides two interfaces from where you can select the items for which the quote is to be raised.

The Product Catalog Navigator of Oracle Sales for Communications provides a graphical interface from where you can select items for the quote. The Product Catalog Navigator allows you to select from preset item navigation categories created specifically for Oracle Sales for Communications.

To add items to the quote:

1. Open the Order Workbench. The Contact Information Region displays information about the customer for whom the quote is being raised.
2. To select products from the Order Workbench:
   a. In the Action field, select ADD.
   b. In the Price List field, select the price list based on which the item price is to be determined.
   c. In the Product field, select the item that the customer wants to order. Oracle Sales for Communications provides a find window to help you quickly find the appropriate product.
   d. In the Price List field, select an appropriate price list.
   e. In the Qty field, select the item quantity for this quote.

      The applicable charges for the selected item appears in the relevant fields. Also, details of the selected items appear on the Attributes, Related Items and Related Charges tabs. Use the information on these tabs to identify related items (especially prerequisite items) and charges that need to be selected for the order.

      Repeat the procedure to add additional items to the quote.
3. To select products from the Product Catalog Navigator:
   a. From the Order workbench, click the Product Catalog button to open the Product Catalog Navigator.
   b. Expand the Catalog. From the appropriate price list, identify and select the item the customer wants to order.
   c. Select the Details button to view and verify item details. Item details and related information appear in the Product Catalog Navigator tabs.
   d. Click the Add to Quote button to add the item to the quote you are creating.
   e. Based on the information displayed on the different tabs, add prerequisite products, if needed.
   f. Close the Product Catalog Navigator.

      The quote you have selected appears on the Order Workbench. Each product is displayed in its own line.

4. To select products from the Install Base:

   a. From the Order workbench, click the Install Base button to open the Install Base.

   b. Select the item you want to modify, reconfigure or remove.

   c. Click the Add to Quote button to add the item to the quote you are creating.

   d. Close the Install Base navigator.

      The products you have selected appear on the Order Workbench. Each product is displayed in its own line.

See Also:

- Adding Configurable Packages to a Quote
- Copying an Order as a New Quote
- Copying a Quote as a New Quote

4.9 Understanding Subscription Management

Oracle Sales for Communications allows your organization to implement subscription based selling using the Subscription Identifier data attribute. This is setup while defining item action parameters (please refer to the *Oracle Sales for Communications Implementation Guide* for details). The attribute to which the Subscription Identifier data attribute is linked indicates the item parameter that will name the subscription.

4.9.1 Entering Product Attribute Values

The item action parameters setup for the item in the quote line determines the item attribute values and the source (enumerated list, customer entered, API, screen, and messages) that can be captured. If the source is an enumerated list you can only select the values defined for the list. If the source is customer entered, you can specify an appropriate value. If the source is an API, screen, or messages, you will need to locate the value and then assign it as the attribute value.

To enter product attribute values:

1. In the Order Workbench, create or query up a quote.
2. Select the quote line (item) for which you want to enter attribute values. The Attributes tab (available on the Line tab) lists the attributes for which values will have to be entered.

   The display on the Attributes tab reflect the setting you have defined for the item on the quote line. Oracle Sales for Communications displays all the item attributes for which you must enter/capture values.
3. On the Attribute tab, select the attribute whose value is to be captured.

   The attributes region shows the attribute and the current value, if any.
4. Assign the appropriate value for the attribute:
   - If the source of the value is customer entered, type in the appropriate value and then select the Assign button.
   - If the source of the value is an enumerated list, select the value from the LOV in for the Value field and then select the Assign button.
   - If the source of the value is an API, message or screen:
     * Select the Locate button to locate the value defined in the appropriate source.
     * Select a value in the Value field.
     * Select the Assign button.

> **Note:** Use the De-Assign button to remove a value assignment you have made for an attribute.

4.9.2 Linking Items Using a Subscription Key

When you add a subscription defining item (an item for which subscription identifier is set) to a quote, Oracle Sales for Communications assigns a temporary subscription key to one of its item parameters. For example, assume that you are adding Basic Phone Service, which is a prerequisite for other items such as Call Forwarding and Voice Mail. Oracle Sales for Communications will assign a temporary subscription key (for example, <2>) to the parameter that defines the subscription. This value will appear in the System field on the Order Workbench.

Subscription requiring items (for example, Voice Mail) on this quote can be linked to the subscription defining item by selecting the temporary subscription key (<2> in the example) in the System field of the quote line.

If the subscription defining item (for example, Basic Phone Service) is removed, the temporary key in the System field of all the linked subscription requiring items will be automatically removed.

4.9.3 Resolving a Temporary Subscription Key

As explained in the previous section, you can link one or more subscription requiring items to a subscription defining item through a temporary subscription key. This key is displayed in the System field on the quote line. For example, you have created a quote on which Voice Mail is linked to Basic Telephone Service (a subscription defining item whose temporary subscription key is <2>). You can resolve the subscription key by invoking the appropriate API call from the Attributes tab to retrieve a telephone number (for example, 650 607-2907). Because this is the attribute that identifies the subscription, the temporary subscription key for Basic Phone Service is resolved from <2> to 650 607-2907. The temporary subscription key of Voice Mail is also resolved from <1> to 650 607-2907. The list of values in the System field will now contain the resolved subscription key in place of the temporary subscription key (<2>).

You may remove the subscription defining item from the quote. In such cases, all the subscription links to that item becomes invalid. If the subscription defining item is removed from the quote prior to having a temporary subscription key resolved, the temporary subscription key is removed from all other items on the quote, and also from the LOV.

If the subscription defining item is removed after resolving the subscription key, Oracle Sales for Communications removes the subscription key from all linked items on the quote.

Note that an order cannot be booked without resolving the temporary subscription key.

To resolve a temporary subscription key:

1. In the Order Workbench, create a quote by adding a subscription defining item. A temporary subscription key appears in the System field of the subscription defining item.
2. Add subscription requiring items to the quote. These items must have the subscription defining item as a prerequisite item.

3. In the System field of each of the quote line for each subscription requiring item, select the temporary subscription key displayed in the System field of the subscription defining item.
4. Select the quote line of the subscription defining item.

   The Attributes tab (available on the Line tab) lists the attributes for which values will have to be entered for this item. One of these attributes will define the subscription, and will be flagged as mandatory.

   The display on the Attributes tab reflect the setting you have defined for the item on the quote line. Oracle Sales for Communications displays all the item attributes for which you must enter/capture values.
5. From the Attribute tab, select the attribute that defines the subscription.

   The attributes region shows the attribute and the current value, if any.
6. Assign a value to the attribute:
   - If the source of the value is customer entered, type in the appropriate value and then select the Assign button.
   - If the source of the value is an enumerated list, select the value from the LOV in for the Value field and then select the Assign button.
   - If the source of the value is an API, message or screen:
     * Select the Locate button to locate the value defined in the appropriate source.
     * Select a value in the Value field.
     * Select the Assign button.

   Note: Use the De-Assign button to remove a value assignment you have made for an attribute. In such cases, you should repeat step 6 to assign another value to the attribute.

   The value you assign to the attribute appears in the System field of the subscription defining item. This value is also inherited by all the items you have linked to the subscription defining item.

4.9.4 Enforcing Prerequisites and Conflicts

Oracle Sales for Communications checks for prerequisites. This check is done against items on the current quote, pending orders and the Install Base. If you select a subscription defining item and subscription requiring items on the same quote, Oracle Sales for Communications will ensure that the subscription defining item is provisioned before the subscription requiring items. Oracle Sales for Communications also performs a similar conflict check.

4.10 Adding Configurable Packages to a Quote

When you select a configurable package for inclusion on a quote, the component items are not immediately listed as quote lines. In this case, only the package level item is placed on the order line.

Oracle Sales for Communications initiates an Oracle Configurator session to allow you configure the items in the package. For details on using Oracle Configurator for configuring packages, please refer to Oracle Configurator documentation.

After the configuration is complete, valid configuration values are passed back to the Order Workbench. At this time, the items in the configured package is listed on the Order Workbench. Each component item is italicized and listed below the package name. The display of package name changes to assume normal color and style.

Each line item can have line level attributes assigned independently of each other. Further, subscription keys can be assigned independently of other line items. However, no individual item in the configuration can be deleted from the quote without removing the entire configuration.

Reconfiguring Items

After the initial configuration of the package, you may choose to revise the configuration by launching the Configurator again. If the Configurator is launched again, it will open with the values saved in the last configuration session. This behavior holds good while reconfiguring a configurable package in the Install Base. In such cases, the configurable package in the Install Base will open with the values saved from the booked order.

Please note that the concept of subscription selling applies to configurable packages as well. Items listed in their own quote lines can be associated with a subscription defining item. Oracle Sales for Communications enforces prerequisite and conflict checks when configurable packages are used in subscription based selling.

Recurring vs. Nonrecurring Charges

The products and services offered by the Communications industry can be charged on a recurring (subscription) or non-recurring (one time) basis. A recurring charge is billed periodically (for example, a wireless phone service billed on a monthly basis). A non-recurring charge is billed only once (for example, installation charges for a DSL connection).

Both recurring and nonrecurring charges can be created as items in Oracle Sales for Communications. These would be available for selection in the same way as items are available for selection.

All applicable charges must be added to the quote. These charges can be identified while selecting items for the quote. The procedures for selecting a charge is identical to the those for selecting items for the quote. Each charge will create its own quote line on the Order Workbench.

4.11 Copying an Order as a New Quote

Oracle Sales for Communications allows you to quickly create new quotes based on an existing order. A quote created as a copy of an order would behave exactly in the same manner as a quote you have created by selecting items; you can modify it just as you would modify any other quote. The new quote will have its own quote number.

To copy an order as a new quote:

1. In the eBusiness Center select customer details and then navigate to the Quote/Order tab.
2. In the View drop-down list, select Orders. The list on the Quote/Order tab refreshes to show the orders you have booked.
3. Select the order whose status is to be viewed.
4. Select the Details button to open the Order Details window.
5. From the Tools menu, select Copy As New Quote.

   Oracle Sales for Communications opens the Order Workbench containing the new quote. This quote will contain all of the same line items as the order from which it was copied. Attribute values will not be copied over, but pricing, accounts, requested dates, shipping and billing information will be copied.

4.12 Copying a Quote as a New Quote

Oracle Sales for Communications allows you to quickly create new quotes based on an existing quote as a template. A quote created as a copy of another quote would behave exactly in the same manner as a quote you have created by selecting items; you can modify it just as you would modify any other quote. The quote created from another would inherit all the line items included on the original quote. Pricing, accounts, requested dates, shipping and billing information from the original quote will also be carried over to the new quote. Oracle Sales for Communications assigns a new quote number to the quote.

To create a new quote using another quote as a template:

1. In the eBusiness Center select customer details and then navigate to the Quote/Order tab.
2. In the View drop-down list, select Quote. The list on the Quote/Order tab refreshes to show the quotes you have saved.
3. Select the quote that is to be copied as a new quote. If you do not see the quote you want to use as the template, search for it. You can open the search screen by clicking the Find toolbar button.
4. From the Tools menu, select Copy Quote.

   Oracle Sales for Communications opens the Order Workbench containing the new quote. This quote will contain all of the same line items as the order from which it was copied. Attribute values will not be copied over, but pricing, accounts, requested dates, shipping and billing information will be copied.

4.13 Working with Service Term Items

Many items from subscription service providers have a term of service intrinsic to the product, be it a one year DSL contract or a three year warranty on a router. Oracle Sales for Communications provides the capability to sell these service contracts as products.

A service term item is a contract or warranty associated with an item in the current quote, an open order, or the Install Base.

4.14 Entering Shipping Information

Oracle Sales for Communications allows you to enter shipping information, if it is different than the billing address. Oracle Sales for Communications allows you to:

- Ship each item on the quote to a separate address
- Split-ship each physical item on a quote line (where quantity is 2 or more) to different shipping addresses.

You can use split-shipping to ship quantities of an item to multiple locations. For example, a customer who is ordering 10 items can ship two to one address, three to another, and five to a third.

To enter shipping information:

1. Open a quote/order in the Order Workbench.
2. On the Lines tab, select the row containing the item for which you want to enter shipping address.
3. Click the Shipment button.
4. In the Qty field, enter the quantity you wish to send to an address. You can specify a partial quantity or the whole quantity, depending on whether you wish to send an item to one or more shipping addresses.
5. In the Ship To field select the name of the individual to whom you wish to ship the item.
6. In the Address field select a ship to address.
7. Enter any shipping or packing instructions.
8. If you wish to ship another quantity of the same item to a different destination, click Next and repeat the above steps.
9. Click OK to save the new shipping address and return to the main Order Workbench.

4.15 Working with Related Charges and Items

All related prerequisite items and charges must be added to the quote as additional lines. View the display on the Related Items tab (available from the Lines tab) to identify the mandatory charges and items for the current item.

After identifying the prerequisite charges and items, add them to the quote by creating a new quote line for each.

4.16 Deleting Items from Quote

You may delete item line from a quote. For this you will need to create a quote line for the item where the action is set to REMOVE. Needless to say that the item line must reflect the line you want to remove.

4.17 Verifying if a Quote is Orderable

Before booking a quote as an order, you must verify that the quote is orderable based on the business rules and relationships established for the items on the quote. This can be done by selecting the Orderable button on the Order Workbench. When you select this button, Oracle Sales for Communications performs prerequisite and conflict checks to ensure that the quote is orderable. Note that only the quotes satisfying all the appropriate business rules can be booked as an order.

To verify a Quote:

1. In the Order Workbench, create or query up a quote.
2. Select the Orderable button.

   Oracle Sales for Communications checks all the items on the order against the applicable business rules. Prerequisite and conflict checks occur with a subscription. These checks are made against the items on the current quote, open orders and the Install Base. Oracle Sales for Communications selects the Orderable check box for each quote line that passes the checks.
3. If a line on the quote does not pass the check, verify its dependencies and correct the problem.
4. Repeat steps 2 and 3 till all the lines pass the checks.

4.18 Working with the Install Base

The Install Base Navigator presents a graphical representation of the products that the customer already has. Oracle Sales for Communications allows you to change, reconfigure and/or remove products in the Install Base, if necessary. This is accomplished by navigating to the Install Base Navigator from the Order Workbench.

Items in the Install Base are grouped by subscription. Oracle Sales for Communications allows you to view details of the items in the Install Base. It also allows you to change, remove and/or reconfigure the items in the Install Base.

To remove, change or reconfigure an item in the Install Base:

1. From the Order Workbench, select the Install Base button. The Install Base Navigator appears.

   The Install Base Navigator presents a graphical representation of the products that the customer already has.

2. From the Install Base Navigator, view item details and then select the item you want to change, remove or reconfigure.

   The details of the selected item appears in the appropriate fields.

   Please note that you can remove individual components from configurable packages only if the business rules set for the package permits it. In some cases, to remove a component you must remove the entire package. You can, however, reconfigure the components of configurable packages.

3. From the Action drop-down list, select the appropriate action. Select:

   - Remove to remove the item
   - Change to replace the item
   - Reconfigure if you want to reconfigure a configurable package.

     You can select multiple items from the Install Base. You must set the appropriate action for each item.

4. Close the Install Base Navigator to return to the Order Workbench.

   Oracle Sales for Communications removes, changes, or reconfigures an item in the Install Base by creating an appropriate quote and booking it as an order. Treat the quote as would any other quote you have created.

5. If you want to reconfigure an item in the quote, select the item and then click the Configure Item button. This would launch Oracle Configurator for the selected item. Follow the instruction in the Oracle Configurator documents to reconfigure the item.

6. Book the quote as an order.

   The Install Base will be updated during the order creation and fulfilment process. Changes to the Install Base may not be visible till this process is complete.

4.19 Checking Order Status

Customers who have pending orders would want to know what has happened to their orders. Oracle Sales for Communications provides an easy mechanism to check order status.

To check Order Status:

1. In the eBusiness Center select customer details and then navigate to the Quote/Order tab.
2. In the View drop-down list, select Orders. The list on the Quote/Order tab refreshes to show the orders you have booked.
3. Select the order whose status is to be viewed.
4. Select the Details button.

   The Order Detail window opens. From this screen you can view the status of the selected order.