

Oracle Fusion Service

**Using Service Center in the
Redwood User Experience**



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Get Help

There are a number of ways to learn more about your product and interact with Oracle and other users.

Get Help in the Applications

Use help icons  to access help in the application. If you don't see any help icons on your page, click your user image or name in the global header and select Show Help Icons.

Get Support

You can get support at [My Oracle Support](#). For accessible support, visit [Oracle Accessibility Learning and Support](#).

Get Training

Increase your knowledge of Oracle Cloud by taking courses at [Oracle University](#).

Join Our Community

Use [Cloud Customer Connect](#) to get information from industry experts at Oracle and in the partner community. You can join forums to connect with other customers, post questions, suggest [ideas](#) for product enhancements, and watch events.

Learn About Accessibility

For information about Oracle's commitment to accessibility, visit the [Oracle Accessibility Program](#). Videos included in this guide are provided as a media alternative for text-based topics also available in this guide.

Share Your Feedback

We welcome your feedback about Oracle Applications user assistance. If you need clarification, find an error, or just want to tell us what you found helpful, we'd like to hear from you.

You can email your feedback to oracle_fusion_applications_help_ww_grp@oracle.com.

Thanks for helping us improve our user assistance!

1 About This Guide

Audience and Scope

This guide explains the principles of using the Redwood user interface, which is built on a brand new application foundation. The guide focuses on what's new in the Redwood user interface. It doesn't explain the underlying Fusion Service functionality.

Related Guides

You must use the following guides to help you understand the underlying Fusion Service concepts.

Title	Description
<i>Implementing Service Center with the Redwood User Experience</i>	Contains conceptual information and procedures needed by your service administrators to implement and extend the Service Center application with the Redwood user experience.
<i>Using Service Center in the Classic User Experience</i>	Contains information to help service managers, service personnel, and other service end-users to perform day-to-day business tasks using Fusion Service.
<i>Implementing Service Center with the Classic User Experience</i>	Describes how to set up Fusion Service.

2 The Basics

Service Center Home Page

From the Home page, you can navigate to the different Service Center work areas and create new items.

If you don't see the **Service Center** navigation icon on the **Service** tab of the Home page, contact your administrator to enable the **Service Requests for Redwood User Interface** opt-in feature. For more information, see "Access Service Center" in the *Implementing Service Center with the Redwood User Experience* guide.

- On the Home page, click the **Service** tab (callout 1 in the screenshot), and then click the **Service Center** navigation icon (callout 2).
Alternatively, you can also click **Navigator > Service > Service Center** (callout 3).
The Service Request List page is displayed.
- From the **Quick Actions** column, you can create new items (callout 4).
- The other features on the Home page aren't used for Service Center. They're intended for other Fusion applications.
- To sign out of the application, click **Sign Out** from the **Settings and Actions** menu (callout 5) on the global header.



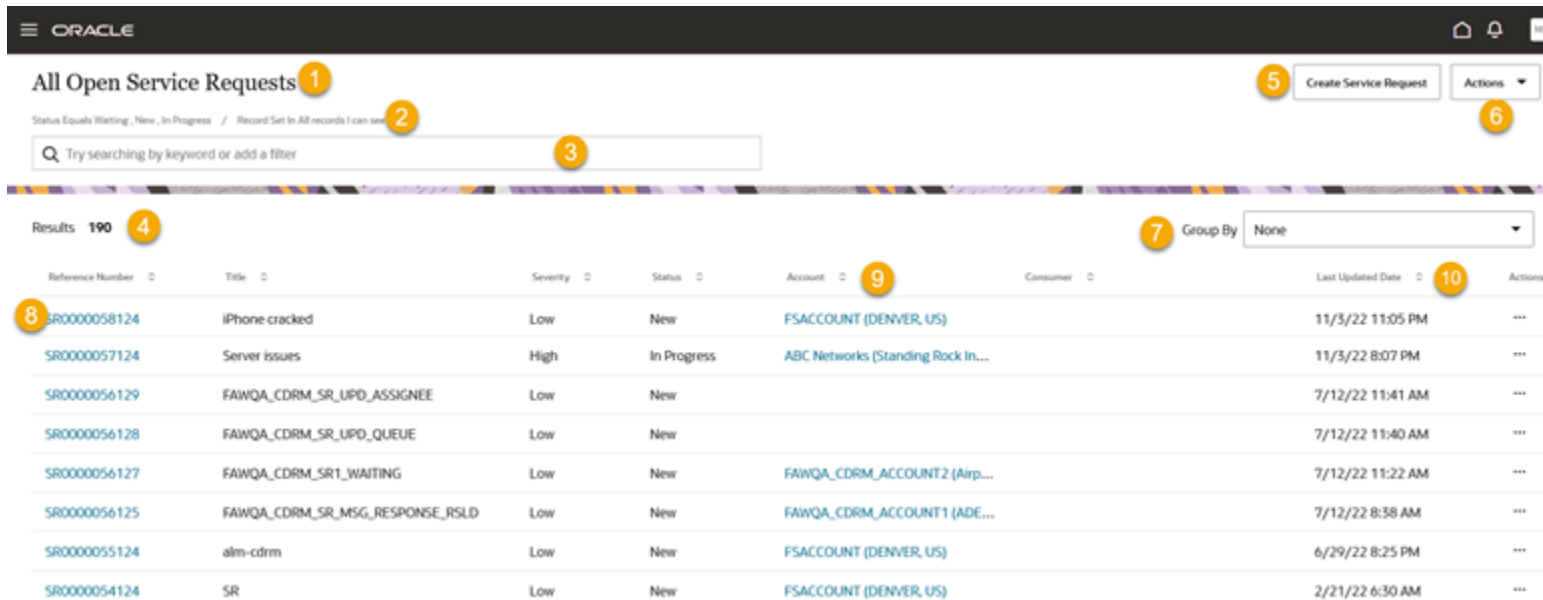
Overview of the List Page

On the Home page, if you click **Service Center** navigation icon, the Service Request List page displays. The **My Open Service Requests** list is displayed by default.

You can select another saved search or create saved searches of your own, to view the corresponding results in the list.

Note: For more information on how to work with filters, saved searches, and the columns displayed on the list page, see the "Saved Searches" and "Lists" topics.

Here's an overview of the different sections of the list page, and what you can do.



Callout No	What is it?	What You Can Do
1	The name of the saved search that's displaying the list you're seeing on the page.	Select a different saved search by clicking in the Search bar.
2	List of filters that apply to the saved search. The record set filter specifies the set of records you can search. The list of filter criteria builds as you add filters and search terms. If there are no filters, you're seeing a list of all of the records that you have permission to view.	<ul style="list-style-type: none"> Remove the filter criteria by hovering over it and clicking the x icon. Add filter criteria from the Search bar.
3	Action Bar/ It lists the available saved searches and actions. To see the list, click in the Action Bar.	<ul style="list-style-type: none"> Search the list by keywords. Enter filters to narrow down the search. Select a saved search. Manage your saved searches.
4	Results. Number of records in the list.	See how many records are displayed under the selected saved search.

Callout No	What is it?	What You Can Do
5	Create Service Request.	Create a new service request.
6	Actions menu	Click the Actions drop-down list to select the following actions: <ul style="list-style-type: none"> • Save • Export: You can export either to Excel or CSV. • Manage Columns • Sort by Relevance
7	Group By	Select an attribute to group the information in your list. For example, if you select Severity , your service request search results get broken down by low, medium, and high severities.
8	Reference Number.	Click the link to drill into the service request details. The Service Request Overview page is displayed in the same browser tab. <ul style="list-style-type: none"> • Open the Service Request Overview page in a new browser tab by right-clicking the link and selecting Open in New Tab.
9	Account	Click the link to drill into the account details. The Account Overview page is displayed in the same browser tab. <ul style="list-style-type: none"> • Open the Account Overview page in a new browser tab by right-clicking the link and selecting Open in New Tab.
10	Columns and sort controls on the column header.	<ul style="list-style-type: none"> • Sort the list by one of the columns. • Adjust the width of the columns • Rearrange the columns by selecting and dragging them.

Saved Searches

Switch to a Different Saved Search

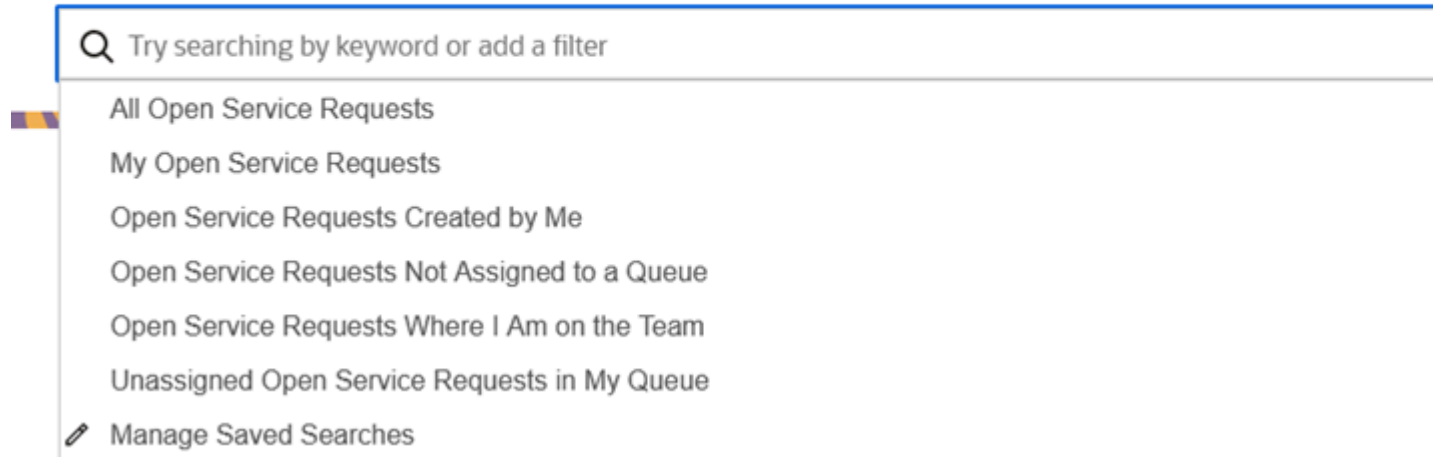
When you navigate to a list page, the application displays the records associated with your default saved search. Here's how you can switch to another saved search:

1. Click in the Search bar.
2. Select the new search from the list of saved searches.

Here's an example of the saved searches available for service requests.

All Open Service Requests

Status Equals Waiting , New , In Progress / Record Set In All records I can see



Create Saved Searches

All users can create their own personal saved searches. Service administrators can also share these saved searches with the rest of the service organization or with certain roles.

Here's how you create a saved search:

1. Navigate to a list page and select a saved search as your starting point. Remember that existing saved searches may already include filters.
2. In the Search bar, add your filters. See the topic "Filter Your List" for details.
3. Add or change the columns displayed in the search results and the default search order by clicking **More Actions** (the horizontal 3 dots icon).
4. Click **Actions > Save**.
5. Enter a name for your saved search in the **Save** dialog box. Saved searches are listed in alphabetic order.
6. Click **Save**.

Your new saved search is now listed in the Manage Saved Searches page.

Manage Your Personal Saved Searches

Here's how you can manage the saved searches you created.

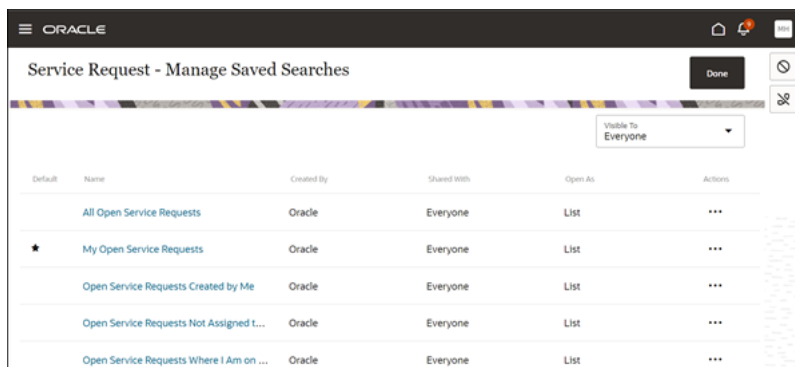
Note:

- You can't edit or delete the saved searches provided by Oracle or your administrator.
- The results of all saved searches are displayed as a list.
- The star icon indicates the default saved search which can be changed to another saved search using **Actions**.

1. Click in the Search bar and select **Manage Saved Searches**.

If **Manage Saved Searches** isn't in your list, you can start typing in the command "Manage" and it will appear for you to select.

The **Manage Saved Searches** page is displayed. The lists are displayed in alphabetic order.



- 2.** (Administrators only) Use the **Visible To** drop-down list to filter the list of saved searches displayed on the page.
- 3.** Click **Actions > Edit** to modify any of the saved searches you created. You can:
 - Rename the saved search.
 - Choose to share this saved search with only yourself, everyone else, and (if you have the required permissions) you can share it with specific roles.
- 4.** Click **Actions > Set as Default** to set the saved search as the default saved search.
- 5.** Click **Actions > Hide from List** to hide the saved search from being displayed on the list page.
To bring it back, go to the **Manage Saved Searches** page, click **Actions > Show in List**.
- 6.** Click **Actions > Delete** to delete any of the saved searches you created.
- 7.** Click **Done**.

Lists

Search Using Keywords

You can use one or more keywords to search in the Search bar.

Your search matches not only on the title, but also related information such as the contact name or request number. So, your search for Bill, it returns all that include Bill in the title, or name of the primary contact.

Select the Correct Saved Search as Your Starting Point

The saved search you select as your starting point determines the scope of your keyword search. For example, selecting the **All Open Service Requests** saved search, lets you search all open service requests you can view. Selecting **My Open Service Requests** lets you search all the open service requests where you're assigned to the service request .

Search Complete Words

1. Finish typing a complete word.
 - o If you're searching for an item with multiple words in the name, you can enter any of the words. For example, to search for **valve pressure issues** , you can enter **valve, pressure, or issues** in the Search bar.
 - o Capitalization is ignored.
2. Press **Enter**.

The application displays a list of records that contain your search term.

Here's an example of how you can search for a keyword **valve** .

The top screenshot shows the 'All Open Service Requests' page with a search bar containing 'valve'. Below the search bar, there are 20 results. The table below shows the first few results:

Reference Number	Title	Severity	Status	Account	Last Updated Date	Actions
0000010005	Valve is broken	Medium	New	Acme Widgets	4/7/21 8:38 PM	...
0000010002	O-ring blistering in covid fre...	Low	In Progress	Acme Widgets	4/6/21 7:44 PM	...
0000007002	Valve Leaking	Low	In Progress	Acme Widgets	4/5/21 11:25 PM	...
0000010001	Possible o-ring issue in man...	Medium	New	Acme Widgets	4/5/21 11:11 PM	...
0000007007	Seeing leakage due to susp...	Low	Waiting	Acme Widgets	4/1/21 6:51 PM	...
0000009016	O-rings are falling in our col...	Low	New	Blackhawk Engineering and ...	3/31/21 7:17 PM	...

The bottom screenshot shows the same page with the search bar containing 'valve' and 3 results. The first three results are highlighted with red boxes:

Reference Number	Title	Severity	Status	Account	Last Updated Date	Actions
0000009012	Issues with the pressure val...	Low	New	Blackhawk Engineering and ...	3/31/21 7:14 PM	...
0000007002	Valve leaking	Low	In Progress	Acme Widgets	4/5/21 11:25 PM	...
0000010005	Valve is broken	Medium	New	Acme Widgets	4/7/21 8:38 PM	...

Search Partial Words, Exact Phrases, and Use Operators

You can search on partial words, exact phrases, and use operators between words. Here's how:

- Use the star (*) symbol to indicate missing characters or partial words. You can use the symbol at the beginning, end, or middle of the search term. For example, in the search bar, enter *12345 to search for a SR with those numbers in it, for example SR0000012345.

For example, entering *tion as your search term to find all items ending with the letters tion. Entering the star symbol in the middle of a word such as p*i*le, returns Pinnacle, Pineapple, and so on.

- Use the question mark (?) to match exactly one character. You can use this wildcard at the beginning, end, or middle of a word.

For example, entering `Price` returns Price, Prize, Pride, and so on.

- Put multiple search terms in quotes to search for exact phrases.

For example, entering `"Pinnacle Corporation"` returns only Pinnacle Corporation, and any other records with those two terms in that specific order.

- Use the OR operator to search on multiple terms.

For example, entering `Chicago OR Pittsburgh`, finds accounts with those terms in the name. If your application administrator enabled searching on addresses, the results also include all accounts in Chicago or Pittsburgh.

- Use the NOT operator to narrow down your search.

For example, entering `Pinnacle NOT Technologies` when searching for accounts, returns all accounts with Pinnacle in the name, but not Pinnacle Technologies.

When you use NOT followed by two or more words you must enclose the words in double quotes (" ").

For example, entering `Pinnacle NOT "Technologies Inc"` when searching for accounts, excludes Pinnacle Technologies Inc.

- Capitalization doesn't matter on search terms, but the operators OR and NOT must be in uppercase letters.

Filter Your List

Use filters to narrow down your search. You can filter your list using information in the object you're searching for as well as information that's stored in related objects. You can add multiple filters. Here's how:

1. On the Service Request List page, click in the Search bar.
2. To filter the list based on numeric values such as the serial number :

- a. Enter **Number** in the Search bar.

A list of numeric fields is displayed.

- b. Select the appropriate field to filter.
- c. Select the operator.

You can select the common operators such as **Equals** or **Contains**. You can also click **Show More** to display all operators.

- d. Enter or select the values, and press **Enter**.

3. To filter the list based on text fields such as title :

- a. Enter the name of the field in the Search bar.

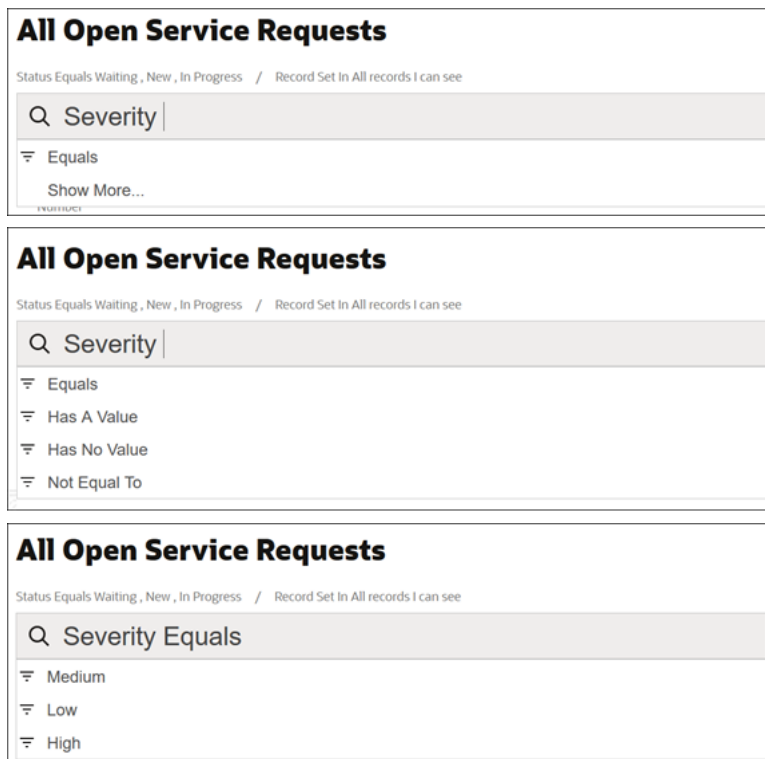
A list of filters is displayed.

- b. Select the appropriate field to filter.
- c. Select the operator.

You can select the common operators such as **Equals** or **Contains**. You can also click **Show More** to display all operators.

- d. Enter or select the values, and press **Enter**.

Here's an example that shows how you can filter the list by the severity:

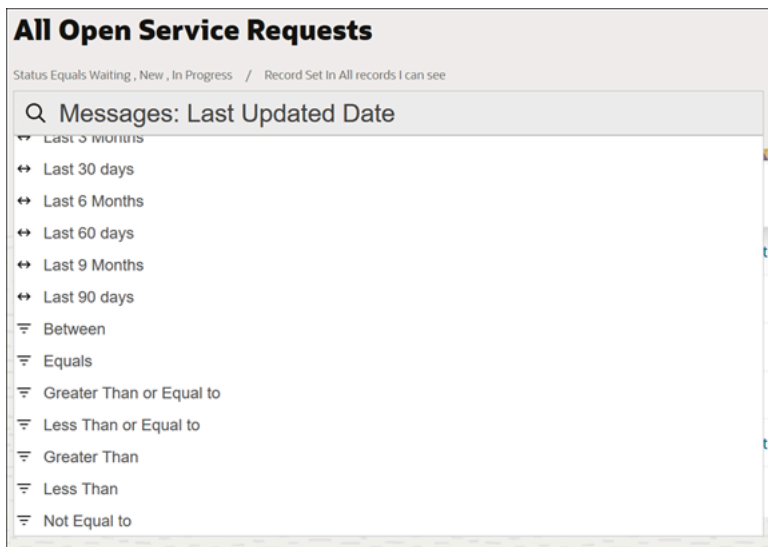
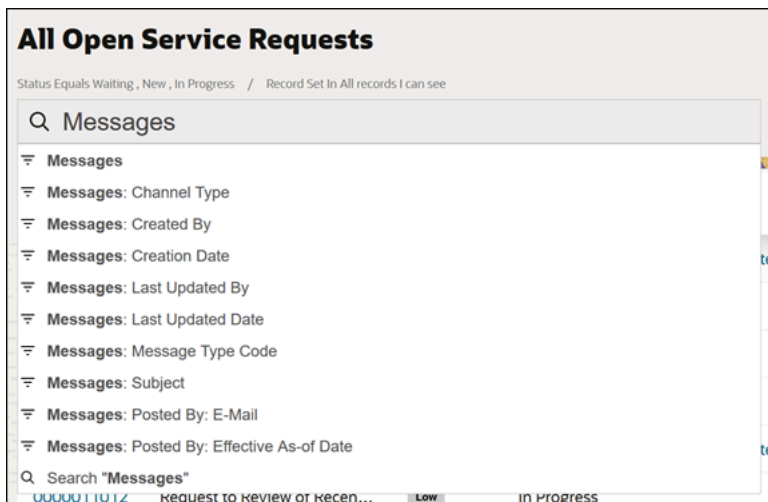


4. To filter the list based on ranges of numeric and date fields:
 - a. Click in the Search bar.
 - b. Search for the numeric field or date field and select it from the list.
 - c. Select the numeric range or operator from the list, and the operator value.

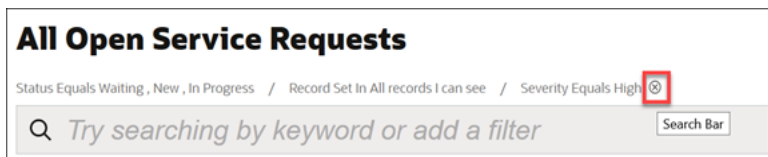
You can select the predefined ranges. You can also select the Between operator and specify your own range.

- d. Press **Enter**.

Here's an example that shows how you can filter the list by the last updated date:



5. To remove a filter, place your cursor over it and click the x icon (highlighted in the following image).



Modify the Display of Fields in the List

You can change what fields display in the list of results, in what order they appear, and how the results are sorted.

Here's what you can do:

- Sort the list by one of the columns:
 - a. To sort the list by one of the columns, click the **Sort Ascending** or **Sort Descending** arrows next to the column name header.
 - b. To restore the default sort order, click the **Actions** drop-down list, and select **Sort by Relevance**.
- Add or remove the columns displayed in the list:
 - a. Click the **Actions** drop-down list and select **Manage Columns**.
 - b. In the **Manage Columns** dialog box, select the fields you want to display and deselect the fields to hide. You can search or scroll through the list.
- Change the order of columns displayed in the list:
 - a. Click the column header for the column you want to rearrange.
The selected column is highlighted.
 - b. Drag the column to the new place.
- Adjust the width of the columns:
 - a. Click on the column you want to resize.
 - b. Hover over the side of the column and drag the column width (from either edges).

Group Your Search Results

On the Service Request List page, you can group your search results by different attributes and display key information about each grouping. Different objects permit different groupings.

Grouping your search results lets you summarize key information, so that your list displays the totals for all the search results and subtotals for each of the groupings. For example, you can group your service requests by severity, which shows you how many service requests are of low, medium, and high severity.

Here's how you group your search results on the list page:

1. Select an attribute from the **Group By** drop-down list.
Your results are automatically grouped on the page in collapsible sections with the count of records in each.
2. Click the **Actions** drop-down list, then choose **Manage Group By**.
The **Manage Group By** window is displayed.
3. From the **Group Sort Order** drop-down list, select a sort option.
4. Click **Apply**.

Export Your Search Results

From the Service Request List page, you can export up to 2,000 search results as either a Microsoft Excel or a .csv file. The exported file includes all of the columns displayed in your search results.

1. Ensure that the **Group By** field is set to **None**. You can't export grouped results.
2. Click the Actions drop-down list, and select **Export** and select the file format, either **Export to Excel** or **Export to CSV**.

The file downloads to your computer.

Navigate from One Record to the Next as You Work a List

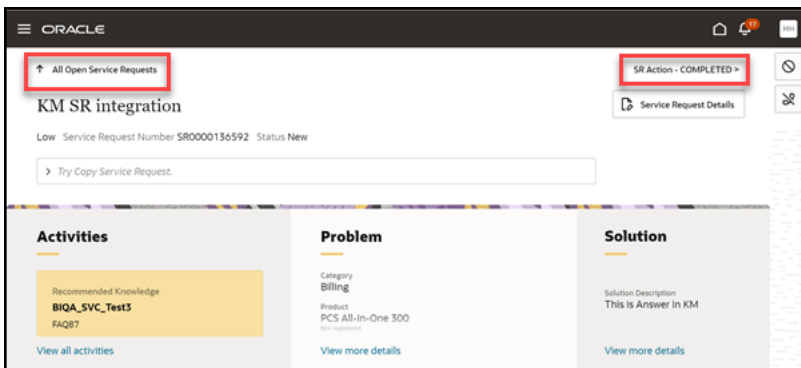
When you have drilled into a record and completed your work there, you can work through the list of records in chronological order. Use the navigation links to go to the next record in the list, or return to your list page.

First, specify your filters and sort order in a list. Next, drill into a record, and when you're done reviewing the record, navigate to the next record in sequence (of your list). Return to your most recently viewed list page whenever you're done reviewing the records.

Note: To work all of the items in the list, drill into the first record of the list, and then use the arrows to go to the next record, or return to your list.

Here's an example of a Service Request Overview page. Click the title of the next record (highlighted in the screenshot) to go to the next record in the list.

Click the name of the list (highlighted in the screenshot) to return to the most recently viewed list page.

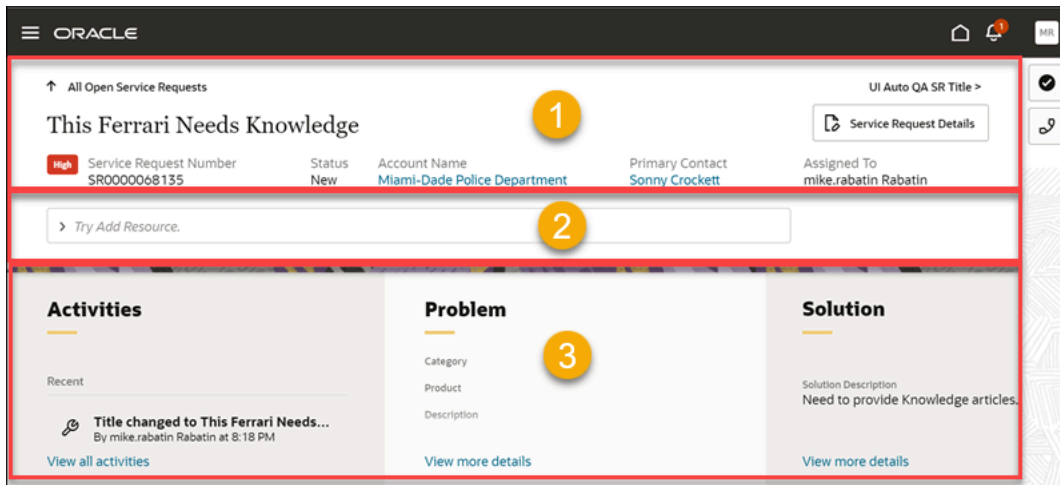


Service Request Overview Page

On the Service Request List page, if you click a service request **Reference Number**, the Service Request Overview page is displayed. This page displays related information about the selected service request.

Here's an overview of the different sections of an individual service request (SR) record and what you can do. The individual record is divided into three sections:

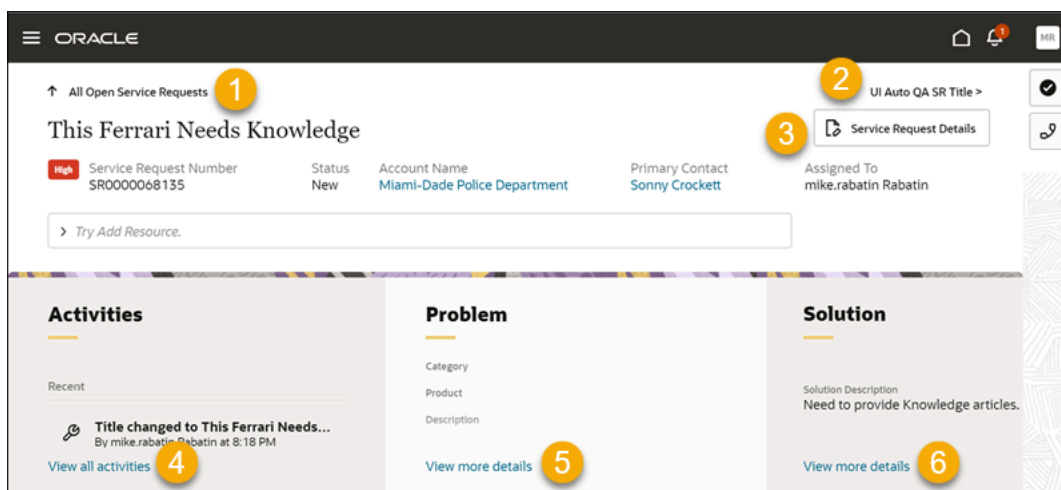
- Summary (callout 1 in the screenshot)
- Action Bar (callout 2)
- Panels with key information (callout 3)



Callout No	What It Is	What You Can Do
1	<p>Summary.</p> <p>Displays basic information about the record. Only fields with values get displayed.</p> <p>If you're drilling into a record from a list, the summary also includes navigation back to the list and provides a way to navigate to the next item on the list.</p>	<p>Click a field link to drill into its details. For example, if you click the Account Name or Primary Contact link, you can drill into the details page for that record. The record overview page opens in a separate tab.</p>
2	Action Bar.	<p>Use the Action Bar to both access and update information and to take actions:</p> <p>Note: You can access the Action Bar using the keyboard shortcut Alt+A for Windows PC and Control+A for Mac.</p> <ul style="list-style-type: none"> • Enter Show to navigate to available information related to the record. • Enter Add or Update to add related information or update individual fields. • Enter Filter to filter out what you want to review in activities. • Search activities by keyword. • Enter Compose to view a list of message types that you can use to send messages to customers or team members.

Callout No	What It Is	What You Can Do
		<ul style="list-style-type: none"> Take other actions. What actions are available depends on what you can do with the record and your permissions. <p>Start typing an action or the name of a field you want to update and select what you want to do from the list of suggestions. To make suggestions, the Action Bar looks for key verbs and names of objects and fields.</p>
3	Panels with key information.	<p>Panels display up to five of the most recently updated items related to the record, including the most recent and pending activities.</p> <p>Which panels you see depends on the type of record and application administrator setup. Not all panels are visible at the same time, and not all information has its own panel.</p> <ul style="list-style-type: none"> The Activities panel displays up to five future and past activities. The Problem panel is always visible. The Solution panel is only visible if there's solution data in there. If there's no solution data, this panel isn't displayed. <p>You must click the link at the bottom of each panel to see all relevant information.</p> <p>To see all of the panels on a record:</p> <ul style="list-style-type: none"> Swipe on a touch screen. Use the wheel of your mouse. Use the Tab key. <p>Alternatively, enter show in the Action Bar to see a list of all information you can view.</p>

Here's an overview of the different fields of an individual service request record and what you can do.



Callout No	What It Is	What You Can Do
1	Name of the list.	Click to navigate back to the previously viewed service request list page.
2	Title of the next service request in the list.	Click to go to the next record in the service request list you viewed most recently. If you have drilled into a service request from the service request list page, this link takes you to the next service request that was on the original service request list that you came from.
3	Service Request Details.	Click to view the Service Request Details page. Here, you can edit multiple fields at once, for the selected service request.
4	View all activities.	Click to view the pending and recent activities. You can return to the record overview page by clicking Go to overview .
5 and 6	View more details.	Click to view the Service Request Details page, where you can edit the service request.

Activities Page

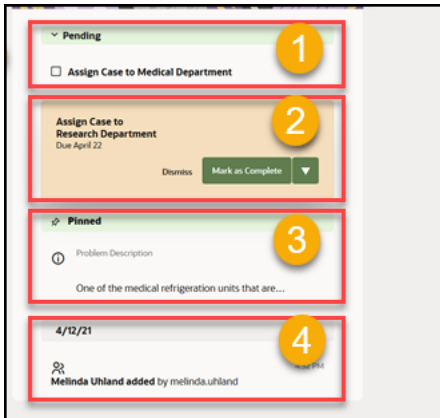
Activities are designed to track important updates, but they don't function as an audit trail. Administrators determine what information is displayed. Individual records for accounts, contacts, and service requests display relevant activities for each corresponding record.

On the **Activities** panel of the Service Request Overview page, if you click **View all activities**, the Activities page is displayed.

From the **Activities** panel and page, you can review internal and customer inbound and outbound messages, conversations, and interactions through various channels (notes, email exchanges, chat, slack, and call logs), as well as important updates to the record itself. Each type of message is displayed in a different background color and with a different icon to enable you to easily identify whether the message was sent by an agent or customer, or whether it's an internal message.

To return to the Service Request Overview page, click **Go to overview**.

Here's an overview of the different sections on the Activities page, and what you can do.



Callout No	What It Is	What You Can Do
1	<p>Pending region.</p> <p>Displays the open items such as action plan actions, action plans, and knowledge articles that you need to complete for the service request. When you complete an item, it moves to the activity feed.</p> <p>This region is displayed only when there's any open item.</p>	<ul style="list-style-type: none"> Update the action plan action or action plan. View the entire knowledge article by clicking on the title of the article. Link the recommended knowledge article to the selected service request.
2	<p>Recommendation region.</p> <p>Displays the next recommended step, highlighted in solid color. This could be:</p> <ul style="list-style-type: none"> Action plan actions that are due immediately. Action plan actions always show up first, especially if they're due in the next 24 hours. Published knowledge articles that can help resolve the selected service request. 	<ul style="list-style-type: none"> Update the action plan action. View the entire knowledge article by clicking on the title of the article. Link the recommended knowledge article to the selected service request.
3	<p>Pinned region.</p> <p>Persists the problem description so that you can see it while you review the service request.</p>	<p>Review and edit the problem description.</p>
4	<p>Activity feed.</p> <p>Shows important updates of the selected record, which your administrator has configured for display. For example, you can view internal and customer inbound and outbound messages, conversations, and interactions through various channels (notes, email chains, chat, slack, and call logs).</p>	<ul style="list-style-type: none"> Filter the history to review past calls, emails, and other interactions with the customer, or see how the record's been changed over time. Read email chains and follow up with your own emails. Collapse and expand the sections.

Callout No	What It Is	What You Can Do
	<p>Note: Your administrator configures the content to be displayed in the Activity feed through Navigator > Configuration > Configure Activities Display > Configure What Displays in the List of Activities > Service Request object.</p> <p>For more information, see How You Enable and Display Activities.</p>	

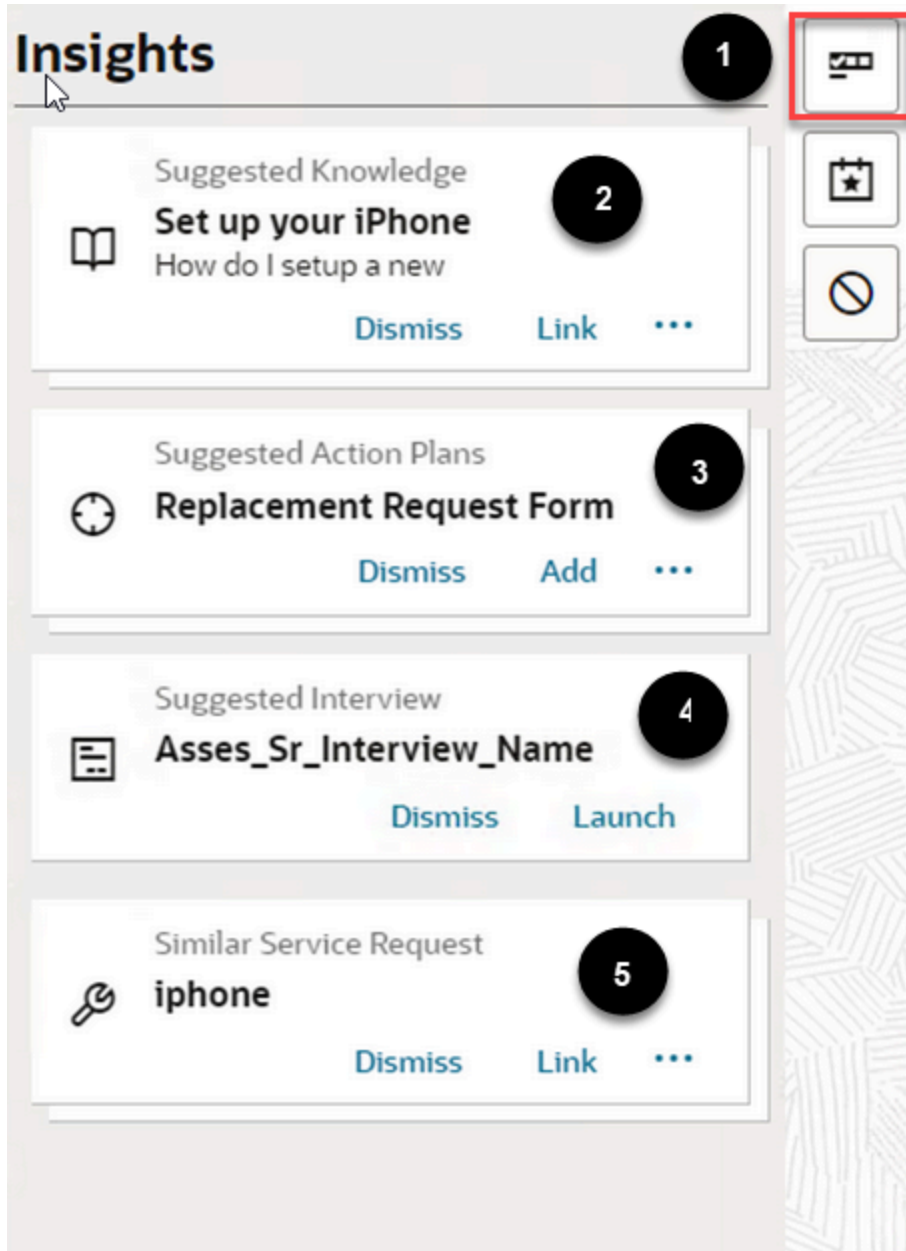
Agent Insights Panel

The interactive **Insights** panel on the Service Request Overview page displays multiple configurable cards that provide recommendations for the most important or the next-best actions you need to take.

These configurable cards are the most commonly used contextual tools that you'll need, to quickly and effectively resolve the current service request (SR) you're working on.

Your administrator must enable the **Insights** panel and configure which cards are displayed within the panel. For more information, see [Set Up the Agent Insights Panel](#).

On the Service Request Overview page of an SR, if you click the **Insights** icon (callout 1), the **Insights** panel is displayed.



Here's the actions that you can take on this panel:

Note: Click **Dismiss** to remove any suggested item.

Callout	Card Type	Actions
2	Suggested Knowledge	<ul style="list-style-type: none"> • Show More. Displays the top 4 suggested knowledge articles, stacked up. • Link. Links the article to the current SR. • Share. Links and opens the Compose Email panel with the article link added.

Callout	Card Type	Actions
		<ul style="list-style-type: none"> • Title Click. Opens the article in a new browser tab. <p>Note: This card is displayed only if the View Knowledge Within Service Request role privilege is enabled for the user.</p>
3	Suggested Action Plans	<ul style="list-style-type: none"> • Show More. Displays the top 4 suggested action plans, stacked up. • Add. Adds the suggested action plan to the current SR. <p>Note:</p> <ul style="list-style-type: none"> • This card is displayed only if the Create Action role privilege is enabled for the user. • If the SR doesn't have a category, no action plans are displayed.
4	Suggested Interview	<p>Launch. Opens the Interview page of the current SR, where the SR can be edited using the configured Intelligent Advisor interview.</p> <p>Note: This card is displayed only if the Interview (Intelligent Advisor integration) is configured.</p>
5	Similar Service Request	<ul style="list-style-type: none"> • Show More. Displays the top 4 similar SRs, stacked up. • Link. Links the suggested SR to the current SR. • Title Click. Opens the suggested SR in a new browser tab. <p>Note: This card is displayed only if the SVC_ENABLE_SIMILAR_SR profile option is enabled for the site.</p>

Service Request Details Page

To edit multiple fields related to the selected service request record, use the Service Request Details page.

On the Service Request Overview page, if you click **Service Request Details**, the Service Request Details page is displayed.

Also, on the **Problem**, **Solution**, and **Relationships** panels of the Service Request Overview page, if you click **View more details**, the Service Request Details page is displayed.

Review Notifications

Here's an overview of how the Bell and Omnichannel notifications work in the application. Specific notifications are predefined by your administrator or manager.

Bell Notifications

The **Notifications** (bell) icon on the global header indicates the number of notifications you've received. As an agent, you can get notified about service requests assigned, service requests escalated, and other important events that require your attention.

Note: To open a notification in the Redwood user interface, your administrator must have assigned the `SVC_NAVIGATE_TO_SERVICE_CENTER_FROM_NOTIFICATIONS_PRIV` privilege to you.



Here's how you can check your notifications:

1. Ensure that you're on one of the Service Center pages.
2. Click **Notifications** (the bell icon) to view all bell notifications.

The **Notifications** window is displayed.



3. Do any of these:
 - o Search for notifications by keyword.
 - o Click a notification link to take further action on that record. You can drill into a service request's details. For example, clicking on a notification about a service request that's escalated, takes you to the activity feed for that request.
 - o Click **Dismiss** to remove a notification from the list.

After you click the notification link or click **Dismiss**, the notification is marked as read and it's cleared from the notification list.

Omnichannel Notifications

The application routes your standard record notifications and multichannel notifications, all with the same look and feel. Here's how the different types of multichannel notifications work.

- Interactive (real-time) notifications, such as incoming phone calls offers.

You can accept or decline these notifications. If you don't take any action, the chat offer times out. You can receive single or multiple chat offers. Multiple chat offers are stacked up.

- Forced (non-real time) notifications, such as service request assignment notifications.

You can receive individual notifications, or a notification with several notifications rolled into it. Non-real time notifications are stacked up to a specified threshold, after which, they roll up into a single multi-notification. The roll up notification also displays the count of assignments.

- In individual notifications, you can click **View** to open the routed item in a new tab. Or, you can click **Close** to dismiss the notification.
- In rolled up notifications, you can only click **Close** to dismiss the notification.
- A desktop or toast notification is displayed if you don't have the Service Center Redwood interface in focus on your desktop.

3 Service Requests

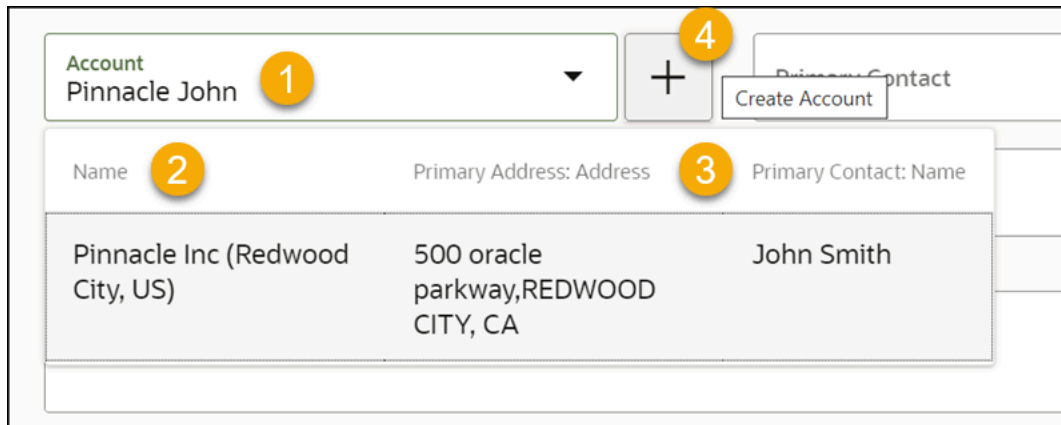
Search Within Fields on Create and Details Pages

On the details pages and create pages, fields that you use to enter accounts and contacts, give you the same advanced search capabilities as list pages.

On the details pages and create pages, the **Account** and **Contact** fields let you search using multiple attributes and combinations of attributes, just as you do in list pages. For example, when you add an account to a service request (SR), you can search for the appropriate account using words in the account name, the primary address, and the name of the primary contact. Which attributes you can use in your search depends on the field and how your application is set up.

Here's a screenshot showing the results of a sample search on **Pinnacle** (one of the words in the account name) and **John** (the primary contact's first name) (callout 1 in the screenshot). The application matches your search terms against the name first (callout 2) and then against the other fields, including the address and primary contact name (callout 3). If you don't find what you're looking for, you can create the account by clicking **Create Account** (callout 4).

Note: The fields you see in the search results, don't necessarily correspond to the fields you can use in your search. Adaptive Search makes it possible for your application administrator to enable search on a large number of fields. For example, your application implementation may permit you to search for accounts by the account owner, but Owner may not be displayed as a column in the results.



Which Attributes You Can Search

Here's a list of the predefined searchable attributes.

Field	Page	Attributes You Can Search
Account	All create pages where the Account field appears	Account Name, Account Primary Address, Primary Contact Name
Contact	All create pages where the Contact field appears	Contact Name, Job Title, Primary Account Name, Primary Email

Field	Page	Attributes You Can Search
Product	Create Service Request	Product, Asset Number, Serial Number

Create a Service Request

Here's how you create a service request:

1. On the Service Request List page, click **Create Service Request**.

The Create Service Request page is displayed.

2. From the **Account** drop-down list, select the account associated with the service request.
 - o You can type a few letters of the account name; the application filters the list and displays matching results.
 - o To create a new account, click **Create Account**.
3. From the **Primary Contact** drop-down list, select the primary contact associated with the account.
 - o To create a new contact, click **Create Primary Contact**.

The contact may or may not be associated to the account, based on the ORA_SVC_ALLOW_ANY_CONTACT_ON_SR profile option setting. If this profile option is set to **Yes**, contacts that aren't related to the service request can be added to the selected service request. This includes contacts of other accounts, consumer contacts, and partner contacts. The default value is **No**, which allows adding only those contacts that are associated with the account.

4. In the **Title** field, enter a title for the service request you're creating.

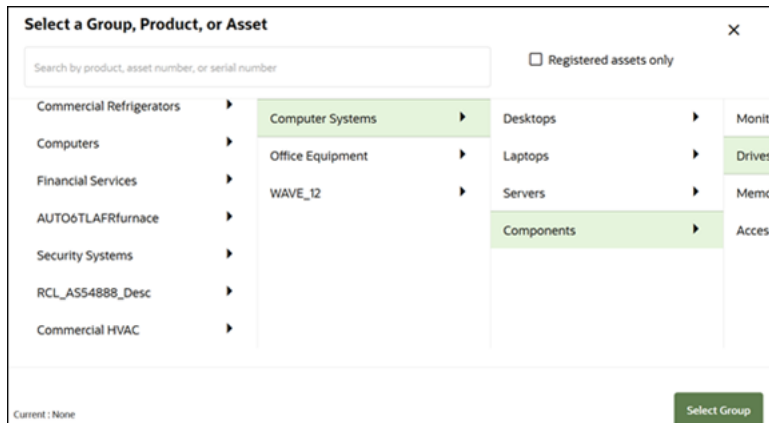
This is the only required field on this page.

5. In the **Problem Description** field, describe the issue.

You can insert SmartText by typing # to display a list of plain SmartText entries, and type-ahead to progressively search and filter this list.

6. From the **Category** drop-down list, select a service request category from the hierarchical list. Expand or collapse category groups to navigate through the hierarchies, and select a category.

- Click the **Product** field and select the product group or product that's associated with the service request. The **Select a Group, Product, or Asset** window is displayed.
 - You can enter a product, asset number, or serial number in the **Search** field to filter the list. The matching search results are displayed in a hierarchical list.
 - To display only registered assets in the list, select the **Registered assets only** check box.
 - Navigate through the hierarchies, select a product group or product, and then click **Select Group** or **Select Product**.



- From the **Severity** drop-down list, select the service request severity.
- From the **Assign To** drop-down list, select the agent you want to assign this service request.
- In the **Attachments** section, select an attachment category from the **Category** drop-down list. Here's a description of the various categories:
 - Miscellaneous means the attachment will be visible to a customer through the Customer Portal.
 - Value Internal means the attachment is only visible through the Agent Portal.
 - Inline Attachments is only used when the SR is created from an email message that contains an imbedded image. Agents aren't advised to use this category.

Here you can attach files and URLs to the service request.

- Drag and drop the files to attach, or click the **Drag and Drop** section to browse the files to attach.
 - To attach a URL, enter the URL name and click **Add URL**.
- Click **Create**.

The Service Request Overview page is displayed with the new service request you created.

Copy a Request

You can copy an existing service request to quickly create a new service request, when most of the information is the same. Here's how you do it:

- Open the service request Overview page for the service request you want to copy.
- In the **Action Bar**, enter **Copy**.

You can also enter synonyms such as **Clone** or **Duplicate**.

3. Select **Copy Service Request** from the list of suggested actions.

The Copy Service Request page is displayed in a new browser tab. The data from the Service Request you're copying, is pre-populated.

Copy Service Request [Cancel] [Copy]

Account: [dropdown] Primary Contact: Clara Joseph [X]

Title: [text input] Required

Problem Description: Employee was hurt at a manufacturing facility. Recovery will require short-term medical leave. What compensation is permitted? 874 Characters remaining

Severity: High [dropdown] Critical: [checkbox]

Category: [dropdown] Product: [text input]

Queue: Default [dropdown] Assign To: Chris Warner [dropdown]

Copy All Contacts

Primary	Name	Job Title	Phone	Email
★	Clara Joseph			noreply@dummysd.com

Copy All Team Members

Assigned To	Name	Email	Phone
★	Chris Warner	chris.warner@oracle.com	

4. In the **Title** field, enter a title for the service request you're creating.
This is the only required field on this page.
5. Modify the values in other fields as appropriate.
For more information, see the "Create a service request" topic.
6. From the **Assigned To** drop-down list, select the agent you want to assign this request.
7. To copy all of the contacts associated with the service request you're copying, select the **Copy All Contacts** check box.
8. To copy all of the team members associated with the service request you're copying, select the **Copy All Team Members** check box.
9. Click **Copy**.
The Service Request Overview page is displayed with the new request you created.

Transfer a Service Request

Here's how you can reassign a service request to another agent.

1. Open the Service Request Overview page for the service request you want to transfer.
2. In the **Action Bar**, enter **Transfer**.
You can also enter the synonym **Reassign**.
3. From the list of suggested actions, select **Transfer Service Request**.

The **Transfer Service Request** panel is displayed.

4. From the **Transfer This Service Request To** drop-down list, select the transfer option:
 - o **A member of the current queue:** Search within the currently assigned queue and assign the service request to someone in the same queue. Use this option only when a queue is specified on the service request. You must have the SVC_ASSIGN_SR privilege to use this option. This option is selected by default.
Note: The members displayed in the **Assign To** drop-down list are filtered based on the currently assigned queue.
 - o **A specific person:** Search all available resources and assign the service request to a resource. You must have the SVC_ASSIGN_SR privilege to use this option.
 - o **Another set of resources:** Search different queues and assign the service request to another queue or someone in a different queue. You must have the SVC_ASSIGN_SR_TO_QUEUE privilege to use this option.
Note: If you select this option, then you also need to select a queue from the **Queue** drop-down list.
5. Select the **Assign To** and **Transfer Reason** as appropriate.
6. In the **Transfer Note** field, enter an internal note explaining the reason for transfer.

You can insert SmartText by typing # to display a list of plain SmartText entries, and type-ahead to progressively search and filter this list.

7. Click **Transfer**.

The service request transfer details are recorded in the activity feed of the corresponding service request. Transfer counts don't include the initial agent assignment, when a service request is created. Transfers are counted from the first time that an agent transfers a service request to another agent or a queue. You can track and monitor the transfer count, and even use it in analytics.

Edit an SR Using the Service Request Overview Page

Add Information

To edit individual fields related to the selected service request record, use the actions in the Action Bar on the Service Request Overview page.

Place your cursor in the Action Bar and select one of the most frequently used actions (common suggestions). Or, start typing an action or search word, and the Action Bar displays suggestions that you can select from a list. To make suggestions, the Action Bar looks for key verbs and names of objects and fields.

In the **Action Bar**, enter **add** to view a list of related items you can add. Here's a list of the related items you can add to a service request:

Action	Description
Add Action	Add individual action plan actions to the service request.

Action	Description
Add Action Plan	Add action plans to the service request.
Add Attachment	Add attachments to the service request.
Add Contact	Add one or more contacts to the service request.
Add Partner Contact	Add one or more partner contacts to the service request.
Add Team Member	Add team members who can view and work on the service request.

How do I update service request fields?

In the **Action Bar**, enter **update** to view a list of individual fields you can update. Here's a list of the fields you can update for a service request:

Action	Description
Update Account	Modify the account associated with the service request.
Update Asset	<p>Modify the asset associated with the service request.</p> <ul style="list-style-type: none"> If you select an account for the service request, then you can select an asset for that account. If you don't select an account but associate a contact with the service request, then you can pick an asset for the contact. If you don't select an account or a contact, you can't select an asset.
Update Assigned To	Modify the agent to whom the service request is assigned.
Update Category	Modify the category of the service request.
Update Critical	Specify whether the service request is critical or not critical.
Update Primary Contact	Modify the primary contact associated with the service request.
Update Problem Description	Modify the problem description of the issue. You can insert SmartText by typing # to display a list of plain SmartText entries, and type-ahead to progressively search and filter this list.
Update Queue	Modify the queue to which the service request is assigned.
Update Related Objects	Modify the relationships between two associated service requests and cases.
Update Severity	Modify the severity of the service request.

Action	Description
Update Status	Modify the status of the service request.
Update Title	Modify the title of the service request.

Filter Data

In the **Action Bar**, enter **filter** or **show** to focus on the information you want to review in the activity feed.

Filter displays the corresponding information in the activity feed. **Show** displays the associated item plus the corresponding information in the activity feed. Here's a list of the filters you can apply:

Action	Description
Filter Actions and Plans	Display only action plan actions and action plans that have been associated to this service request.
Filter Appointments	Display only appointments.
Filter Attachments	Display only attachment history.
Filter Contacts	Display only contact history.
Filter Customer Communication	Display only customer entries and responses (including auto-acknowledgements), and interactions with customers, such as phone, chat, and email. This filter hides internal notes and application notes.
Filter Field Changes	Display all updates to the service request fields.
Filter Internal Conversations	Display only conversation threads.
Filter Internal Notes	Display only internal notes.
Filter Linked Content	Display only linked knowledge articles and similar service requests.
Filter Messages	Display all types of service request messages, such as customer entries, responses, application messages, and internal notes.
Filter Milestones	Display only the milestones associated with the selected service request.
Filter Tasks	Display only tasks.
Filter Team Members	Display only team members.

Action	Description

Action	Description
Show Actions and Plans	Display only action plan actions and action plans that have been associated to this service request.
Show Attachments	Display only attachment history.
Show Contacts	Display only contact history.
Show Linked Content	Display only linked knowledge articles and similar service requests.
Show Milestones	Display only the milestones associated with the selected service request.
Show Relationships	Display only the relationships between two associated service requests and cases.
Show Team	Display only team members.
Show Appointments	Display only appointments.
Show Tasks	Display only tasks.

You can filter the activity feed by multiple entities such as contacts, team members, messages, and so on.

1. In the **Action Bar**, enter the filters in sequence.
2. To remove a filter, click **Remove** (the X icon).
3. To clear all filters, click **Clear**.

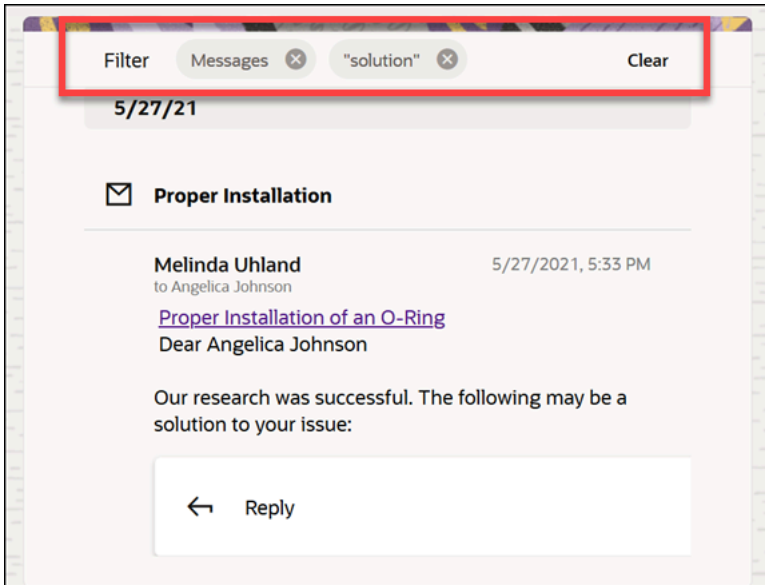
You can also filter the activity feed by a combination of an entity type and a keyword. Here's an example that shows you how to filter by the messages (entity type) that have a keyword `solution` in them:

1. In the **Action Bar**, enter **Filter Messages**.

The activity feed displays all types of service request messages, such as customer entries, responses, application messages, and internal notes.

2. In the **Action Bar**, enter **solution**.

The activity feed displays only those messages that contain the keyword `solution`.



Compose Messages

In the **Action Bar**, enter **compose** to view a list of message types that you can use to send messages to customers or team members. Here's how you compose the various message types for a service request:

Action	Description
Compose Email	Start a new email conversation with a customer. Messages created using this action are sent as an email to all the recipients on the message.
Compose Internal Note	Create an internal note in the service request. You can use internal notes to save any notes on the service request, such as research work you've done to resolve a service request. Internal notes aren't visible to customers in the customer portal or to partners.
Compose Web Message	Send a message to a customer on the customer portal. The customer contact can see the web messages by signing into the customer portal.
Capture Customer Message	Capture what the customer has reported to you about the service request. You should use this action only if you aren't using the typical ready-to-use channels such as telephony or email integration. Messages or comments created by customer contacts using the customer portal also show up as customer messages.
Compose Message	Use this action if you've defined your own channel types and want to create a message of type response, using that channel type.
Start Internal Conversation	Start a new conversation with an internal user. Use this action if you want to reach out to internal users for help in resolving the service request. In an internal conversation, you can reach out to other users using these channels: Email, Slack, Microsoft Teams, Web.

Compose Email

To send a new email (start a new email thread):

1. Open the Service Request Overview page for the service request for which you want to send an email.
2. In the **Action Bar**, enter **Compose**.

You can also enter the synonym **Send**.

3. From the list of suggested actions, select **Compose Email**.

The **Compose** panel is displayed.

Note: The channel type is selected as **Email** by default.

4. In the **To** field, enter, or search and select the email recipients by typing a few characters and selecting the recipients from the list.
 - o If a primary contact exists for the service request, it's populated in the **To** field by default.
 - o You can optionally select other recipients from the **Cc** and **Bcc** fields.
 - o You can also add external recipients that aren't displayed in the list.

5. In the **Subject** field, enter the email subject.

6. Enter the email content.

You can insert SmartText by typing # to display a list of rich-text SmartText entries, and type-ahead to progressively search and filter this list.

7. To add an attachment to your message, drag and drop the file you want to attach.

Note: If your administrator has set the ORA_SVC_ENABLE_INBOUND_INLINE_ATTACHMENT_CATEGORY, ORA_SVC_ADD_FIRST_ATTACHMENT_TO_SR_MESSAGE, and SVC_INBOUND_ENABLE_INLINE_ATTACHMENTS profile options to **Yes**, images and logos (in the sender's signature) are displayed inline within the body of the service request message. They won't show up as regular service request attachments.

8. To preview your email before sending it, click **Preview**.

9. To save your email as a draft message, click **Save as Draft**.

The draft email is displayed in the **Pending** region.

a. To edit your draft email, click **Edit Draft**.

b. To delete your draft email, click **Delete Draft**.

10. Click **Send**.

All incoming and outgoing interactions are recorded, and displayed in the activity feed for the corresponding record.

To reply to an email or follow up to one you sent:

1. Go to that email in the activity feed:

- o Click **Reply** when the last message in the email thread has a single recipient (To, Cc, and Bcc included).
- o Click **Reply All** when the last message in the email thread has multiple recipients (To, Cc, and Bcc included).

When you reply to a message, it's added as a child of the message you're replying to, so that all messages in the email thread are grouped together as conversations.

Note:

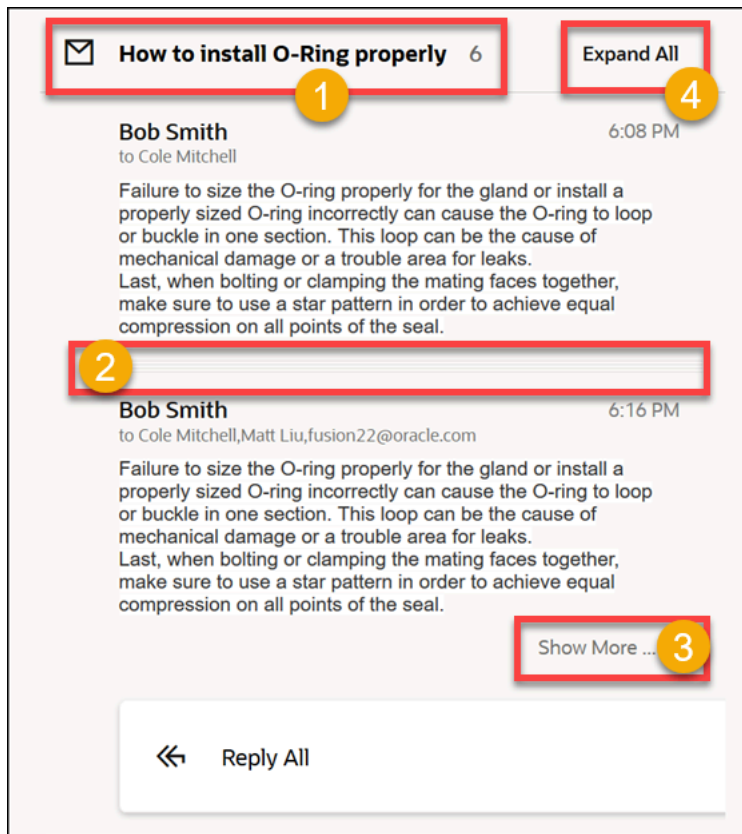
- If you preview your reply, the preview includes all past conversations in the email thread, up to the email you're currently replying to.
- If you save your reply as a draft message, it's displayed in the activity feed itself, and it's highlighted as **Draft**. You can edit or delete the draft email later. You can only have one draft message for each email thread.

2. Compose your reply and click **Send.**

In the activity feed, by default, up to 4 emails in an email thread are displayed fully. When there's 5 or more emails in an email thread, the first and last emails are displayed, with the other emails collapsed. The total number of emails in the email thread is specified on the email message header (callout 1 in the screenshot). Here's the different ways to expand the messages in the email thread:

- In an individual message that's contracted, click **Show More** to view the complete message (callout 3).
- To expand up to 5 emails in the email thread, click the email message header. The first 4 emails and the last email in the thread are displayed, with the other messages collapsed. To expand the remaining messages, click the double lines between the messages (callout 2).

- To see the entire email thread along with each individual message fully expanded, click **Expand All** on the email message header (callout 4). Once you've expanded the entire email thread, you can click **Collapse All** to collapse it.



Compose Internal Note

To post an internal note:

1. Open the Service Request Overview page for the service request for which you want to post an internal note.
2. In the **Action Bar**, enter **Compose**.
3. From the list of suggested actions, select **Compose Internal Note**.
The **Compose** panel is displayed.

4. Enter your notes.

You can insert SmartText by typing # to display a list of rich-text SmartText entries, and type-ahead to progressively search and filter this list.

5. To add an attachment to your message, drag and drop the file you want to attach.

Note: If your administrator has set the `ORA_SVC_ENABLE_INBOUND_INLINE_ATTACHMENT_CATEGORY`, `ORA_SVC_ADD_FIRST_ATTACHMENT_TO_SR_MESSAGE`, and `SVC_INBOUND_ENABLE_INLINE_ATTACHMENTS` profile options to **Yes**, images and logos (in the sender's signature) are displayed inline within the body of the service request message. They won't show up as regular service request attachments.

6. Click **Post**.

All internal notes are recorded, and displayed in the activity feed for the corresponding record.

You can edit the internal notes you've created, if your administrator has set the `SVC_ENABLE_MESSAGE_CORRECTION` profile option to **Yes**. Here's how you do it:

1. Go to your internal note in the activity feed.
2. Hover over the internal note header and click the **Edit** (pencil) icon.
3. Update your notes and click **Save**.

Compose Web Message

To send a web message:

1. Open the Service Request Overview page for the service request for which you want to send a web message.
2. In the **Action Bar**, enter **Compose**.

You can also enter the synonym **Send**.

3. From the list of suggested actions, select **Compose Web Message**.

The **Compose** panel is displayed.

Note: The channel type is selected as **Web** by default.

4. Enter your message.

You can insert SmartText by typing # to display a list of rich-text SmartText entries, and type-ahead to progressively search and filter this list.

5. To add an attachment to your message, drag and drop the file you want to attach.

Note: If your administrator has set the `ORA_SVC_ENABLE_INBOUND_INLINE_ATTACHMENT_CATEGORY`, `ORA_SVC_ADD_FIRST_ATTACHMENT_TO_SR_MESSAGE`, and `SVC_INBOUND_ENABLE_INLINE_ATTACHMENTS` profile options to **Yes**, images and logos (in the sender's signature) are displayed inline within the body of the service request message. They won't show up as regular service request attachments.

6. Click **Save**.

All web messages are recorded, and displayed in the activity feed for the corresponding record.

Capture Customer Message

To record a customer message:

1. Open the Service Request Overview page for the service request for which you want to record a customer message.
2. In the **Action Bar**, enter **Compose**.
3. From the list of suggested actions, select **Capture Customer Message**.

The **Compose** panel is displayed.

4. Select the **Channel** and **Channel Type** from the drop-down lists.
5. In the **From** field, update the contact if required.

You can enter, or search and select a contact by typing a few characters and selecting the contact from the list.

6. Enter your message.

You can insert SmartText by typing # to display a list of rich-text SmartText entries, and type-ahead to progressively search and filter this list.

7. To add an attachment to your message, drag and drop the file you want to attach..

Note: If your administrator has set the `ORA_SVC_ENABLE_INBOUND_INLINE_ATTACHMENT_CATEGORY`, `ORA_SVC_ADD_FIRST_ATTACHMENT_TO_SR_MESSAGE`, and `SVC_INBOUND_ENABLE_INLINE_ATTACHMENTS` profile options to **Yes**, images and logos (in the sender's signature) are displayed inline within the body of the service request message. They won't show up as regular service request attachments.

8. Click **Save**.

All customer messages are recorded, and displayed in the activity feed for the corresponding record.

You can click **Reply** to follow up on the customer message you captured. This creates a response message type. You can add multiple recipients and also use the **Reply All** and **Expand All** options as described in the "Compose Email" section.

Compose Message

If you've created your own custom channels, here's how you can send a message:

1. Open the Service Request Overview page for the service request for which you want to send a message.
2. In the **Action Bar**, enter **Compose**.

You can also enter the synonym **Send**.

3. From the list of suggested actions, select **Compose Message**.

The **Compose** panel is displayed.

4. Select the **Channel** from the drop-down list, such as email, phone and so on.
5. In the **To** field, enter, or search and select the message recipients by typing a few characters and selecting the recipients from the list.
 - o If a primary contact exists for the service request, it's populated in the **To** field by default.
 - o You can also add external recipients that aren't displayed in the list.

6. In the **Subject** field, enter the message subject.

7. Enter your message.

You can insert SmartText by typing # to display a list of rich-text SmartText entries, and type-ahead to progressively search and filter this list.

8. To add an attachment to your message, drag and drop the file you want to attach..

Note: If your administrator has set the `ORA_SVC_ENABLE_INBOUND_INLINE_ATTACHMENT_CATEGORY`, `ORA_SVC_ADD_FIRST_ATTACHMENT_TO_SR_MESSAGE`, and `SVC_INBOUND_ENABLE_INLINE_ATTACHMENTS` profile options to **Yes**, images and logos (in the sender's signature) are displayed inline within the body of the service request message. They won't show up as regular service request attachments.

9. Click **Save**.

All messages are recorded, and displayed in the activity feed for the corresponding record.

You can click **Reply** to follow up on the message you sent. This creates a response message type. You can also use the **Reply All** and **Expand All** options as described in the "Compose Email" section.

Perform Other Actions

Here's the additional actions you can perform using the Action Bar.

Action	Description
Log a Call	Lets you log inbound or outbound call notes manually, if your organization doesn't have an integration to a telephony system, and you're using a desk phone.
Search Knowledge	Searches the knowledge database and displays the results in a new browser tab that includes the Title and Reference Number .
Find Similar Service Requests	Searches the application for similar service requests based on the key attributes of the service request you're currently working on. The results are displayed in a new browser tab. Note: The Action Bar displays the Find Similar Service Requests action in the suggested actions even when you enter these synonyms for find: search, show, detect, obtain, and match .
Resolve Service Request	Lets you resolve a service request. Note: The Action Bar displays the Resolve Service Request action in the suggested actions even when you enter these synonyms for resolve: close, complete .
Copy Service Request	Lets you copy an existing service request to quickly create a new service request, when most of the information is the same. Note: The Action Bar displays the Copy Service Request action in the suggested actions even when you enter these synonyms for copy: clone, duplicate .
Delete Service Request	Lets you delete a service request, if you have the required permissions.

Edit an SR Using the Service Request Details Page

Update Summary Information

The **Summary** section lets you update basic details about the service request.

1. In the **Summary** section, click into any field and begin editing.
2. Modify any of these fields following the steps specified in the "Create a Service Request" topic:

- o Account.

Note:

If you update the account name, all associated contacts in the service request may be removed. This depends on whether your administrator had set the `ORA_SVC_ALLOW_ANY_CONTACT_ON_SR` profile option to No. If the profile option is set to Yes, contacts will not be cleared.

- o Primary Contact
 - o Title
 - o Problem Description
 - o Status
 - o Severity
 - o Category
 - o Product
 - o Queue
 - o Assign To
3. To include this service request in the critical service request reporting metric, select the **Critical** check box. It doesn't affect the service request resolution.
 4. Click **Save**.

Update Solution Details

Here you can prepare notes and draft descriptions, and validate them before formally resolving the service request.

If required, the Outcome, Resolution, and Solution Description can be updated in this section.

1. Click in the **Solution Details** section and begin editing or adding information.
2. Enter or update the **Solution Description**.

You can insert SmartText by typing # to display a list of plain SmartText entries, and type-ahead to progressively search and filter this list.

3. Click **Save**.

Update Milestones

A milestone is a type of entitlement. Entitlements are benefits or privileges you provide to customers when you extend service to them.

A milestone identifies service levels your organization has committed to its customers, and is tracked when providing service in the context of a service request.

Here's the ready-to-use milestones you get with the application:

- **First Response Metric:** Tracks how quickly you agree to respond to a customer, or an employee after the request is received.
- **Resolution Metric:** Tracks how quickly you must resolve the request.

The Milestones section lets you update these milestones. Here's how:

1. In the **Milestones** list, click the vertical 3 dots icon, and click **Edit** for the milestone you want to update.
2. To modify the milestone due date, click in the **Due Date** field, select the date, and then click **Done**.
3. To acknowledge that you have completed the milestone and close it, click the **Agent Completed** slider.
4. Enter your comments in the **Comments** field.
5. Click **Save**.

Update Contacts

Here you can add one or more contacts to the service request. Any contact you add can view and update the request.

1. In the **Contacts** section, click **Add Contact**.
2. Select a contact from the drop-down list.
3. To create a new contact, click **Create New** in the list.
4. To make one of the contacts the primary contact, click the vertical 3 dots in the Actions field for the selected contact, and then click **Make Primary**.
5. After adding a contact who isn't the primary contact, you can click vertical 3 dots in the Actions field and set access to Regular or None, depending on your need.
6. To delete a contact, click the vertical 3 dots icon for the selected contact, and then click **Remove Contact**.

Note: You can change the primary contact, but you can't delete a primary contact.

Update Attachments

Attach files and URLs and edit attachments to the service request.

1. In the **Attachments** section, drag and drop the files to attach them, or click in the field to add files from your local computer.
2. To attach a URL, enter the URL name and click **Add URL**.
3. To download an attachment, click **Download** for the selected attachment.

- To edit and attachment, click the ellipsis button (...) and select **Edit**.
- To delete an attachment, the ellipsis button (...) and select **Remove** for the selected attachment.

Update Team

Here you can add team members who can view and work on the service request.

- In the **Team** section, click **Add Team Member**.
- Select a team member from the drop-down list.
- To delete a team member, click the vertical 3 dots icon for the selected resource, and click **Remove Team Member**.
- To assign the service request to a team member, click the vertical 3 dots icon for the selected resource, and click **Assign To**.
- Click **Save**.

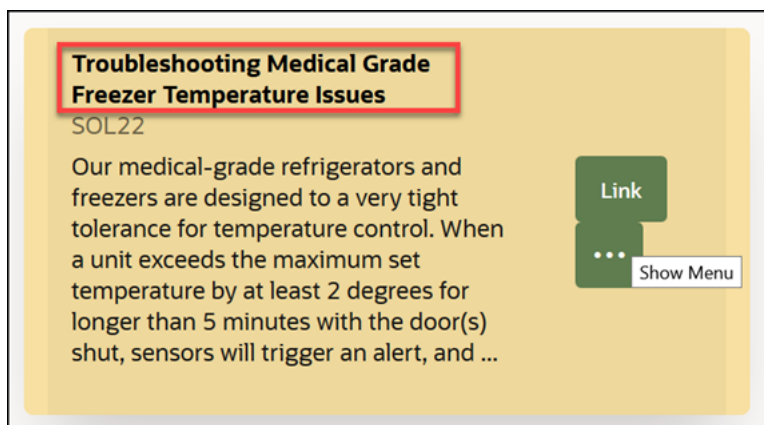
Resolve a Service Request

Link and Share a Knowledge Article

The **Recommendation** region of the Activities page displays knowledge articles that can help resolve the selected service request.

The application recommends published knowledge articles that closely match the values in the combination of the **Title**, **Category**, and **Product** fields of the service request. You can link the recommended knowledge article to the selected service request. You can even share the knowledge article with your customers (the service request contacts). Here's how:

- In the **Recommendation** region of the Activities page:
 - Click **Link** to link the knowledge article to the selected service request.
The linked knowledge articles are displayed in the activity feed for the selected service request.



- Click **Show Menu** (the horizontal 3 dots icon) > **Share** to share the knowledge article link with customers.

The **Compose Email** panel is displayed with a link to the knowledge article included in the compose email window.

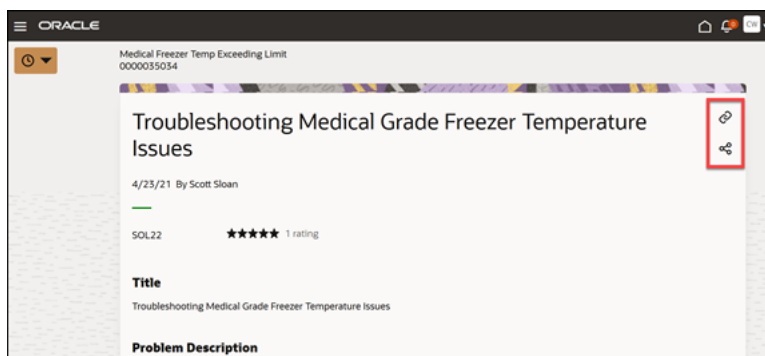
- i. Compose your email.
- ii. (Optional) Add attachments and preview your email.

Note: If your administrator has set the `ORA_SVC_ENABLE_INBOUND_INLINE_ATTACHMENT_CATEGORY`, `ORA_SVC_ADD_FIRST_ATTACHMENT_TO_SR_MESSAGE`, and `SVC_INBOUND_ENABLE_INLINE_ATTACHMENTS` profile options to **Yes**, images and logos (in the sender's signature) are displayed inline within the body of the service request message. They won't show up as regular service request attachments.

- iii. Click **Send**.

The email is displayed in the activity feed for the selected service request.

- o Click **Show Menu** (the horizontal 3 dots icon) > **Not Helpful** to dismiss the recommended knowledge article.
- o Click the title of the article (highlighted in the screenshot) to view the entire knowledge article in a separate browser tab.



Review the knowledge article and do any of the following:

- Click **Link to Service Request** (highlighted in screenshot) to link the knowledge article to the selected service request.

Note: Click **Unlink from Service Request** to unlink the knowledge article from the selected service request.

- Click **Share in Service Request** (highlighted in screenshot) to share the knowledge article link with customers.

The **Compose** panel is displayed with a link to the knowledge article included in the compose email window.

- Rate the knowledge article.

2. On the Service Request Overview page:
 - a. Enter **Show Linked Content** in the Action Bar.

The Activities page is displayed along with the linked content panel. It lists the linked published knowledge articles and similar service requests.
 - b. To view the entire knowledge article in a separate browser tab, click the knowledge article link.
 - c. To unlink the knowledge article from the selected service request, click the vertical 3 dots icon, and then click **Unlink from Service Request**.
 - d. To share the knowledge article link with customers, click the vertical 3 dots icon, and then click **Share**.

The **Compose Email** panel is displayed with a link to the knowledge article included in the compose email window.

If the compose email window is already open, the knowledge article link will be inserted in the email.

Find Similar Service Requests

Service request similarity lets you troubleshoot issues accurately and efficiently, by finding similar service requests that may have been previously resolved.

SR Similarity uses adaptive intelligence (AI) for similarity computation, by considering the key standard or custom fields of an SR. Attributes such as **Title, Problem Description, Product, Category**, and messages exchanged are used to find similar service requests that can help resolve the current service request.

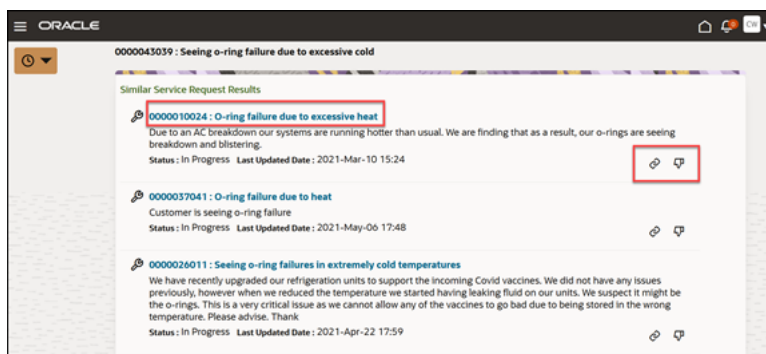
Your administrator must enable the Service Request Similarity feature for you to use it. For more information, see the "Enable Service Request Similarity" topic from *Implementing Service Center with the Redwood User Experience* guide shown in Related Topics.

Here's how you can find and link similar service requests:

1. Open the Service Request Overview page for the service request for which you want to find similar service requests.
2. In the **Action Bar**, enter **Find**.

You can also enter synonyms such as **Search, Show, Detect, Obtain**, and **Match**.
3. Select **Find Similar Service Requests** from the list of suggested actions.

The Similar Service Request Results list page is displayed in a new browser tab.



4. To link the similar service request to the current service request, click **Link to Service Request** (highlighted in the screenshot).

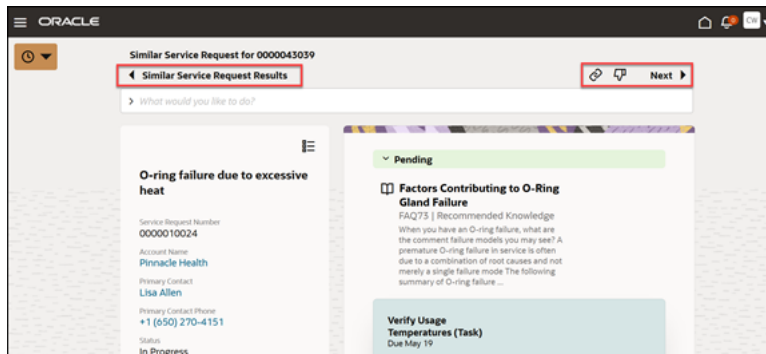
The linked similar service requests are displayed in the activity feed for the selected service request.

5. To indicate that a matched similar service request isn't relevant, click **Not Relevant** (the thumbs down icon highlighted in the screenshot).

Every time you link or vote down a matched similar service request, you're providing feedback to the adaptive intelligence system.

6. To view the details of a service request, click the title of the service request (highlighted in the screenshot).

The Similar Service Request Overview page is displayed.



7. Review the service request details and click **Link to Service Request** or **Not Relevant** (highlighted in the screenshot), as appropriate.
 - o To navigate to the next service request from the list of similar service request results, click **Next** (highlighted in the screenshot).
 - o To return to the Similar Service Request Results list page, click **Similar Service Request Results** (highlighted in the screenshot) or the arrow.
8. On the Service Request Overview page:
 - a. Enter **Show Linked Content** in the Action Bar.

The Activities page is displayed along with the linked content panel. It lists the linked published knowledge articles and similar service requests.
 - b. To view the similar service request details in a separate browser tab, click the service request link.
 - c. To unlink the similar service request from the current service request, click the vertical 3 dots icon, and then click **Unlink from Service Request**.

Related Topics

- [Enable Service Request Similarity](#)

How do I resolve a request?

Here's how you can resolve a service request.

You can use rich-text to create SmartText entries in request message fields by enabling HTML. Other fields, such as Problem Description and Solution Description only support plain text.

1. Open the Service Request Overview page for the service request you want to resolve.
2. In the **Action Bar**, enter **Resolve**.

You can also enter synonyms such as **Close** or **Complete**.

3. Select **Resolve Service Request** from the list of suggested actions.

The **Resolve Service Request** panel is displayed.

Note: The values in the drop-down lists in the **Resolve Service Request** panel are configured by your administrator. The following steps are an example of the resolve flow based on the ready-to-use data provided in the application. You need to select the appropriate values for the service request. For example, when resolving a service request where a knowledge article helped solve it, select the following values for steps 5, 6, and 7.

4. From the **Status** drop-down list, select **Resolved** (selected by default).
5. From the **Outcome** drop-down list, select **Solution Provided**.
6. From the **Resolution** drop-down list, select **Knowledge Article**.
7. From the list of knowledge articles (if some knowledge articles are already linked to the service request), select the articles that resolved the service request.

Note: The list of linked knowledge articles is displayed only when you select **Solution Provided** outcome and **Knowledge Article** resolution.

8. In the **Solution Description** field, enter the details explaining about the solution of the problem.

You can insert SmartText by typing # to display a list of plain SmartText entries, and type-ahead to progressively search and filter this list.

9. Click **Resolve**.

Delete a Service Request

If you have the required permissions, you can delete a service request. A deleted service request can't be retrieved, and the delete action can't be undone. Here's how you do it:

1. Open the Service Request Overview page for the service request you want to delete.
2. In the **Action Bar**, enter **Delete**.
3. Select **Delete Service Request** from the list of suggested actions.

A confirmation message is displayed.

4. Click **Delete** in the confirmation dialog box.

The service request is deleted and the Service Request List page is displayed.

4 Message Center

Internal Conversations

Start an Internal Conversation

Messaging is the centralized hub for communication and team collaboration to initiate the conversation with other resources within your organization. You can start an internal conversation with other agents (or subject matter experts) to assist you in resolving a service request, through various channels.

Here's how you start an internal conversation:

1. Open the Service Request Overview page for the service request where you want to initiate a conversation.
2. In the **Action Bar**, enter **Start**, and select **Start Internal Conversation** from the list.
The **Internal Conversation** panel is displayed.
3. Select a **Channel Type** based on the type of message you want to create, and select the corresponding **Channel**:

If the Channel Type is	Here's What You Can Do	Channel to Select
Email	Send an email to the selected recipients.	Email channel Note: You must check with your administrator and select the appropriate email channel: <ul style="list-style-type: none"> ○ While communicating with a subject matter expert (SME), use the channel that your administrator has created for internal conversations. For example: <code>internal@mycompanydomain.com</code> ○ While communicating with a customer, use the channel that your administrator has created for conversations with customers. For example: <code>support@mycompanydomain.com</code> <p>The SME's reply is sent to Conversation Message.</p> <p>The customer's reply is sent to SR Message.</p>
Slack	Send a message to a single Slack channel, or to multiple Slack users.	Slack workspace

If the Channel Type is	Here's What You Can Do	Channel to Select
	<p>Note:</p> <ul style="list-style-type: none"> ○ You can't send a message to the following: <ul style="list-style-type: none"> - Multiple Slack channels - A combination of a Slack channel and one or more Slack users. ○ You can send and receive attachments when communicating one-on-one with a user, or when communicating with a channel in Slack. 	
Web	Send a message to the selected recipient within the Service Center application.	Web
Microsoft Teams	<p>Send a message to a single Microsoft Teams channel or to multiple Microsoft Teams users.</p> <p>Note:</p> <ul style="list-style-type: none"> ○ You can't send a message to the following: <ul style="list-style-type: none"> - Multiple channels - A combination of a channel and a user ○ You can send and receive attachments when communicating one-on-one with a user, but not when communicating with a channel in Microsoft Teams. 	Select a tenant. If there's only one tenant, it will be selected by default.

4. Select the recipients of the message in the **To** field.

For **Email** channel type, you can also optionally select from the **Cc** and **Bcc** fields.

Start typing a few characters and select the recipients from the **All Resources** list. You can also add additional recipients that aren't in the list.

5. Enter the content of the message.

You can use SmartText entries by typing #.

6. To add an attachment to your message, click the **Attachment** icon and select the file to attach.
7. Click **Send**.

Reply to Messages

Here's how you can reply to the various types of internal conversations.

- For Email channel type, reply from your email client.
- For Slack channel type, do one of the following in your Slack application:
 - Click **Reply to Service Request** on the message that you receive from your service application. Type your reply and press **Submit**.

When you reply this way, your reply is automatically created as a message on the request.

- Click **Reply** to use the native Reply action in Slack. You must also mention your company's app in the format `@AppName` in your reply.

Here, AppName is the name of your company's Slack app created for your service application. When you mention your app in this format, your reply is created as a message on the request.

- For Microsoft Teams channel type, do one of the following in your Microsoft Teams application:
 - Click **Reply to Service Request** on the message that you receive from your service application. Type your reply and press **Enter**.

When you reply this way, your reply is automatically created as a message on the request.

- Click **Reply** to use the native Reply action in Microsoft Teams. You must also mention your company's app in the format `@AppName` in your reply.

Here, AppName is the name of your company's Microsoft Teams app created for your service application. When you mention your app in this format, your reply is created as a message on the request.

- For Web channel type:
 - a. On the Home page, click **Service > Quick Actions > My New Messages** (callout 2 in the screenshot).

The My New Messages List page is displayed. This page lists all new messages sent to you, which you haven't replied to yet.

Note:

- The messages that you have replied to, are displayed on the My Messages List page.
To navigate to this page, on the Home page, click **Service > Quick Actions > My Messages** (callout 3).
- In the Filter bar, you can search for a message by the subject or sender name.

- b. Click **Reply** for the message you want to reply.
- c. Enter your message content and click **Send**.

Note:

- SmartText isn't supported in replies sent through the My New Messages List or My Messages List pages.
- To add an attachment to your message, click the **Attachment** icon and select the file to attach.

All internal conversation threads are displayed in the activity feed of the associated service request.

5 Calls

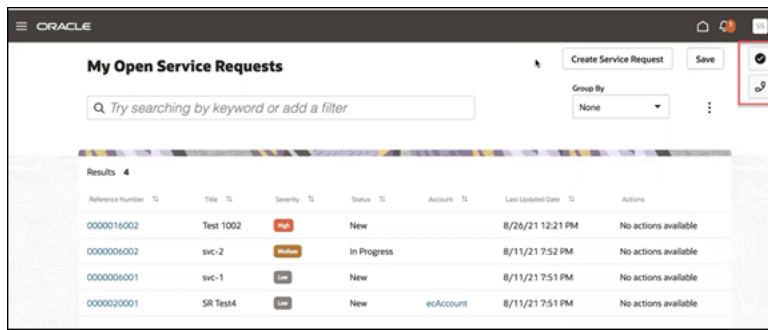
Make Yourself Available for a Call

Work assignments are determined by your availability, and your availability is triggered once you sign into sign in and navigate to Service Center.

Here's how you make yourself available for a call:

1. On the Service Request List page, click the phone availability icon.

The **Manage Presence** pane is displayed.



2. Make yourself available for a call.

When you point to these icons (highlighted in the screenshot), the tooltips indicate your availability status.

The **Manage Presence** pane collapses automatically when you click anywhere outside the pane.

Inbound Call

Outbound Call

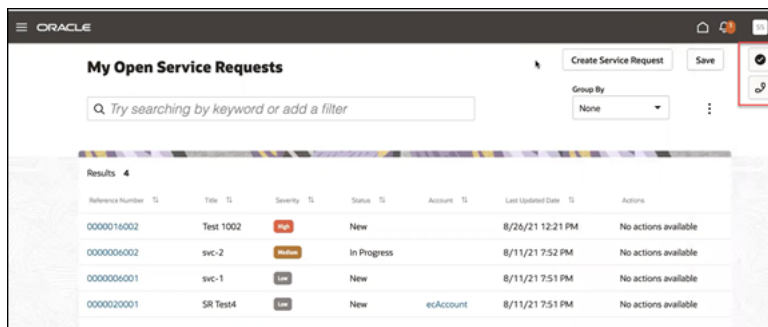
6 Chat

Make Yourself Available for a Chat

Work assignments are determined by your availability, so once you sign in to the application, set your presence and availability. You can explicitly specify your availability for work types such as chat and service request, and for a phone call.

Here's how you make yourself available for a chat:

1. On the Service Request List page, click the work type availability icon.



2. From the menu, select **Chat**.

When you point to these icons (highlighted in the screenshot), the tooltips indicate your availability status.

Chat With a Customer

Here's how you can help a customer through a real-time chat.

Note: To use SmartText messages in chat interactions, use the # key to bring up available SmartTexts.

1. Make yourself available for a chat.
2. Click **Join** to accept the incoming chat when the offer notification is displayed.

Basic details such as subject, queue, and customer who initiated the chat are displayed in the offer notification. Once you accept the offer:

- If the customer has provided a service request number in the chat request form, the Service Request Overview page is opened along with the Chat panel, in a new browser tab.
- If the customer has provided a name, phone number, or email ID in the chat request form, the Contact Details page is opened along with the Chat panel, in a new browser tab.

3. In the Chat panel, verify the customer:
 - o If the customer-provided details match the details displayed on the Service Request Overview page (or Contact Overview page), click **Verify**.
 - o If the customer-provided details don't match, the Unknown Contact page is displayed.
 - i. On the Unknown Contact page, search for the contact from the **Lookup Contacts** search field.
 - ii. Click **Search Again** to search for another contact.
 - iii. Click **Create Contact** to create a new contact if the record doesn't exist.
 - iv. Click **Verify** after you select or create a contact.
4. Engage in a conversation with the customer. You can insert SmartText by typing # to display a list of SmartText entries.

Note: You can have multiple chats simultaneously. Each Chat panel opens in a separate browser tab.

5. (Optional) In the Chat panel, click **Transfer to Queue** to transfer the chat to another queue.
 - a. From the **Queue Name** drop-down list, select a queue.
 - b. Enter any notes in the text field, and click **Transfer**.
6. Click **End Chat** when finished.

The **Wrap Up** panel is displayed, where you specify the chat resolution.

7. From the **Outcome** drop-down list, select an outcome for the chat, and add any notes you may want.
8. Click **Save**.

The chat transcript is recorded and displayed in the activity feed for the corresponding service request or contact record.

9. To edit the record in the activity feed, hover over it, then click the **Edit** (pencil) icon.

You can edit the note or change the outcome value from the drop-down list.

The interactions for inbound chat offers from known contacts that were rejected, abandoned, or timed out, are also recorded and displayed in the activity feed for the corresponding contact record. However, you can't edit these interactions.

- o Rejected chats include the incoming chat offers that you declined to join.
- o Abandoned chats may include the incoming chat offers that were missed, ignored, or disconnected before you answered them.
- o Timed out chats include the chats that ended due to a time out.

If you miss a chat request from a customer, the missed chat details are also displayed in the **Notifications** window (the bell icon on the global header).

7 Actions and Plans

What's the Difference Between an Action and a Plan?

An action plan action is an individual event that needs to be done to close a service request.

Action plan actions can be tasks, activities, appointments, cases, opportunities, help desk requests, or service requests. Action Plan Actions are often called "Solo Actions." An action plan is a checklist, a series of action plan actions that are connected together and require completion before you can close a request. In this chapter, "action plan actions" are referred to as "actions", and "action plans" are referred to as "plans".

Actions

Add Individual Actions

Here's how you add solo actions to a service request :

1. Navigate to the Service Request Detail page for the service request to which you want to add an action.
2. In the **Action Bar**, enter **Add Action** and press **Enter**.

You can also select it from the suggested actions in the Action Bar.

The list of available actions is displayed in the Action Bar.

3. From the drop-down list, select an action.

You can also search for the action name.

The selected action is displayed with the field values that are used to create the action, in the **Pending** region.



Add Action
DontEdit_SR_Action_Automation_01 Cancel Submit

The following values are read-only and will be used in the action.

Title
Automated SR - RWCHAT P1

Business Unit
Vision Construction ▼

Stripe Code

4. Modify any fields if required, and click **Submit**.

The selected action is displayed in the **Pending** or **Recommendation** region.

View the Details of an Action

The actions and plans that have been applied to the selected request are in the Actions and Plans list of the Service Request Details page.

The actions and plans are sorted with the next item due at the top of the list. Here's how to view action details:

1. Navigate to the Service Request Details page.
2. Click the **More** icon (the vertical three dots icon) on the line for the action you want to view.
3. Click **View Details**.

Depending on the type of object, the details of the selected action are displayed either inline in the panel, or in a separate browser tab.

Edit an Action

Here's how you can edit an action.

1. To mark an action as completed:
 - For an action in the **Pending** region, select the **Mark as Complete** check box for the action to mark as complete.
 - For an action in the **Recommendation** region, click **Mark as Complete** from the drop-down list.
 - For an action in the **Actions and Plans** panel, click **More** (the vertical 3 dots icon) > **Mark as Complete**.

The completed actions are listed in the activity feed.

2. To update notes for an action:
 - For an action in the **Pending** region, click **More** (the vertical 3 dots icon) > **Update Notes**.
 - For an action in the **Recommendation** region, click **Update Notes** from the drop-down list.
 - For an action in the **Actions and Plans** panel, click **More** (the vertical 3 dots icon) > **Update Notes**.
 - Enter your notes and click **Save**.
3. To modify the details of an action:
 - For an action in the **Pending** region, click **Edit** or **Edit in Browser Tab**.
 - For an action in the **Recommendation** region, click **View Details** or **Edit** (depending on the object type) from the drop-down list.
 - For an action in the **Actions and Plans** panel, click **More** (the vertical 3 dots icon) > **View Details**.
Depending on the type of object, the details of the selected action are displayed either inline in the panel, or in a separate browser tab.
 - Edit the required fields and click **Save**.
4. To dismiss a recommendation, click **Dismiss** in the **Recommendation** region.
Dismissed items are moved from the **Recommendation** region to the **Pending** region. The application displays other recommendations, if available. Otherwise, the **Recommendation** region is cleared.

Plans

Add Plans

Here's how you add a plan to a service request request.

1. Navigate to the Service Request Details page for the request to which you want to add a plan.
2. In the **Action Bar**, enter **Add Action Plan** and press **Enter**.
You can also select it from the suggested actions in the Action Bar.
The list of available plans is displayed in the Action Bar.
3. From the drop-down list, select a plan.
You can also search for the plan name.
The selected plan is displayed in the **Pending** or **Recommendation** region of the Activities page.

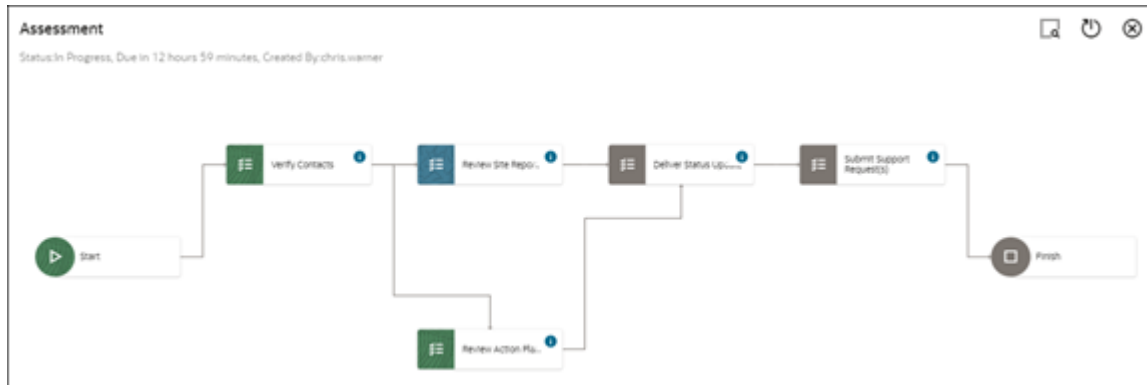
Edit a Plan

Here's how you can edit a plan.

1. On the Service Request Details page, enter **show Actions and Plans** in the Action Bar.

The Activities page is displayed along with the **Actions and Plans** panel. It lists all past and present actions and plans.

2. To view the diagram view of the plan, click **More** (the vertical 3 dots icon) > **View Diagram**.



The diagram view shows a high-level view of the plan from start to finish. Click the horizontal 3 dots icon on each action to view the details of the action or mark it as complete.

Note: Diagrams aren't used for Action Plan Actions.

3. To refresh a plan with the latest updates to the associated request, click **More** (the vertical 3 dots icon) > **Refresh**.
4. To edit the notes for a plan, click **More** (the vertical 3 dots icon) > **Update Notes**.
5. To edit the associated actions in a plan:
 - a. Click the arrow to expand a plan.
 - b. Edit the required actions as specified in the "Edit an Action" topic: mark actions as complete, update notes, or modify the action's details.

8 Cases

Overview of Case Management

What is Case Management?

Case Management is a professional and collaborative process that provides the ability to manage long running processes to meet an organization's needs related to managing escalations, investigations, problems, applications, and other issues.

For example, a case is created whenever an application for specific services is requested by an applicant. Applications are typically assessed for eligibility of services, and upon successful assessment, a Case is created and managed. Unlike service requests, cases typically stretch over a long period of time, involve multiple parties as well as multiple documents and messages to deliver a solution or service, and often require complex business processes for successful completion.

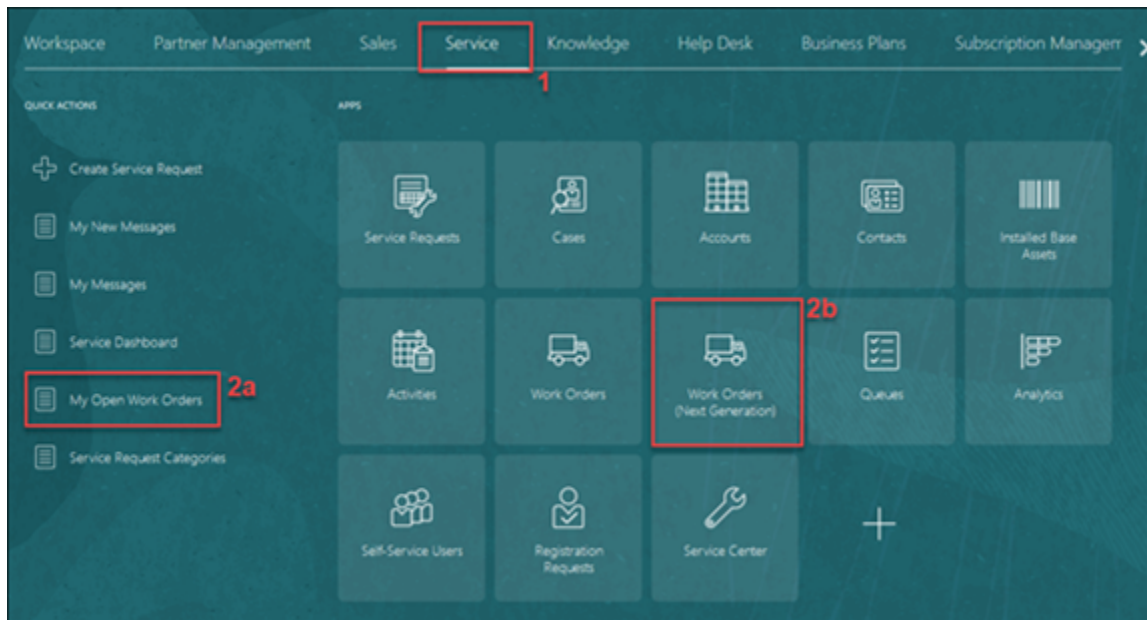
The overall case management process is iterative, non-linear, and cyclical, with its phases being revisited as necessary, until the intended outcome is achieved. A Case can be different than a service request, as Cases are often employee, client, citizen, or student focused, and the outcome is often difficult to predict or measure. A case can be a process that ties together one or more services (benefits) delivered by an institution to a person (individual), group (household), or organization (customer account) to fulfill the specific intent and needs of the recipient.

9 Work Orders

Navigate to Next Generation Work Orders

A work order can be any work performed at a customer site, like an installation, standard maintenance, or a repair request.

Here's how to create a work order:



1. Go to the Home page and select **Service** tab.
2. You can access work orders one of two ways:
 - o In the list of Quick Actions, click **My Open Work Orders** callout (2a).
 - or
 - o Click the **Work Orders (Next Generation)** tile (callout 2b).

The My Open Work Orders list page is displayed. This is a list of all your open work orders. The following table includes the functions of the links in the columns on the page.

Reference Number	Title	Service Request	Contact Name	Account	Scheduled Date and Start Time	Status	Contact	Actions
0000016018	Control Board Replacement	0000021002	Lisa Allen	Pinnacle Health	08/07/21 12:00 PM	Scheduled	Lisa Allen	No actions available
0000016019	Replace Control Board	0000019001	Lisa Allen	Pinnacle Health	09/07/21 2:00 PM	Scheduled	Lisa Allen	No actions available

Callout Number	What happens when I click the link?
1. Reference Number	The work order opens in edit mode.
2. Service Request	Service Center opens in a new window where you can view the details of the SR that's associated with the work order.
3. Account	Digital Sales opens the account in the same browser window enabling you to view account details. To view the record in a new tab, just right-click and select Open in a New Tab.
4. Contact	Digital Sales opens the contact in the same browser window enabling you to view account details. To view the record in a new tab, just right-click and select Open in a New Tab.

Generic Work Orders

Create a Generic Work Order

Now that you understand how to navigate to work orders, let's create one.

If your company is using work orders for both Oracle Field Service and generic work orders, the **Create Work Order** button is drop down where you can choose which of these work order types to create. If you're using only one type of work order, the **Create Work Order** button appears with no drop down.

For this example, let's create a generic work order.

To learn how to create an Oracle Field Service work order, scroll to the next section of this chapter.

The screenshot shows the 'My Open Work Orders' page. At the top, there is a search bar with the text 'Try searching by keyword or add a filter'. Below the search bar is a table with columns: Reference Number, Title, Service Request, Contact Name, Account, Scheduled Date and Start Time, Status, Contact, and Actions. Two work orders are listed:

Reference Number	Title	Service Request	Contact Name	Account	Scheduled Date and Start Time	Status	Contact	Actions
0000016018	Control Board Replace...	0000021002	Lisa Allen	Pinnacle Health	08/07/21 12:00 PM	Scheduled	Lisa Allen	No actions available
0000016019	Replace Control Board	0000019001	Lisa Allen	Pinnacle Health	09/07/21 2:00 PM	Scheduled	Lisa Allen	No actions available

On the right side of the page, there is a 'Create Work Order' button with a dropdown arrow. The dropdown menu is open, showing two options: 'Generic' and 'Oracle Field Service Cloud'. A red box highlights the 'Create Work Order' button and the dropdown menu.

1. Click **Create Work Order** drop down and select **Generic**.

The screenshot shows the 'Create Work Order - Generic' form. The form is titled 'Create Work Order - Generic' and has a 'Cancel' button and a 'Create' button. The form contains the following fields:

- Title (Required)
- Account (Dropdown)
- Contact (Dropdown)
- Phone (Text field, with a warning icon and the message 'Enter a valid phone number.')
- Email (Text field)
- Product (Text field with a search icon)
- Type (Dropdown)
- Time Zone (Dropdown)
- Address (Section header)
- Country (Dropdown, set to 'United States')
- Address Line 1 (Text field)
- Address Line 2 (Text field)
- City (Dropdown)
- State (Dropdown)
- Postal Code (Dropdown)
- Resolution Due (Text field with a calendar icon)
- Scheduled (Text field with a calendar icon)
- Remind Customer Minutes Before (Dropdown)
- Case Note (Text area, with a character count of '1000 Characters remaining')
- Status (Dropdown)
- Service Request (Dropdown)
- Assigned To (Dropdown)

2. Complete the work order form.

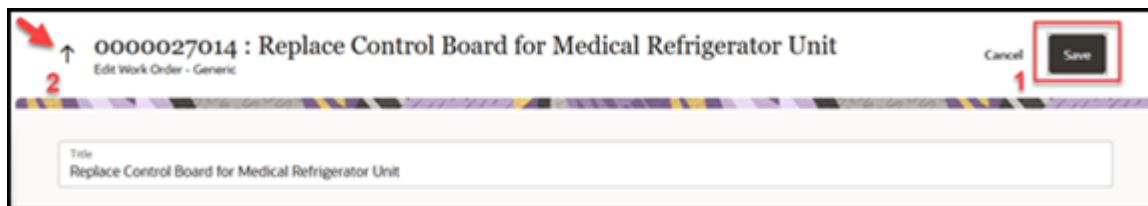
- **Title:** Required
- **Account:** The Account for the Work Order
- **Contact:** The contacts in the drop down are filtered by the selected account. You'll only see contact names for that account.
- **Phone** and **Email** automatically populate for the contact.
- **Product:** Opens a picker where you can select an associated group, product, or asset.
- **Type:** The work order type.
- **Time Zone:** Time zone for the contact
- **Address:** The address information including **City, State,** and **Postal Code.**
- **Resolution Due** and **Scheduled** service: The Date pickers in these fields let you select dates.
- **Remind Customer Minutes Before:** The amount of time the customer should be notified before the service technician arrives.
- **Case Note:** Notes for the work order.
- **Status:** The status of the work order.
- **Service Request:** Service requests associated with this work order.
- **Assigned To:** The work order will automatically be assigned to you when the work order is created. You can also use the drop down to select someone else.

3. Click **Create**.

The work order is created. The Edit Work Order page is displayed for the work order you just created.

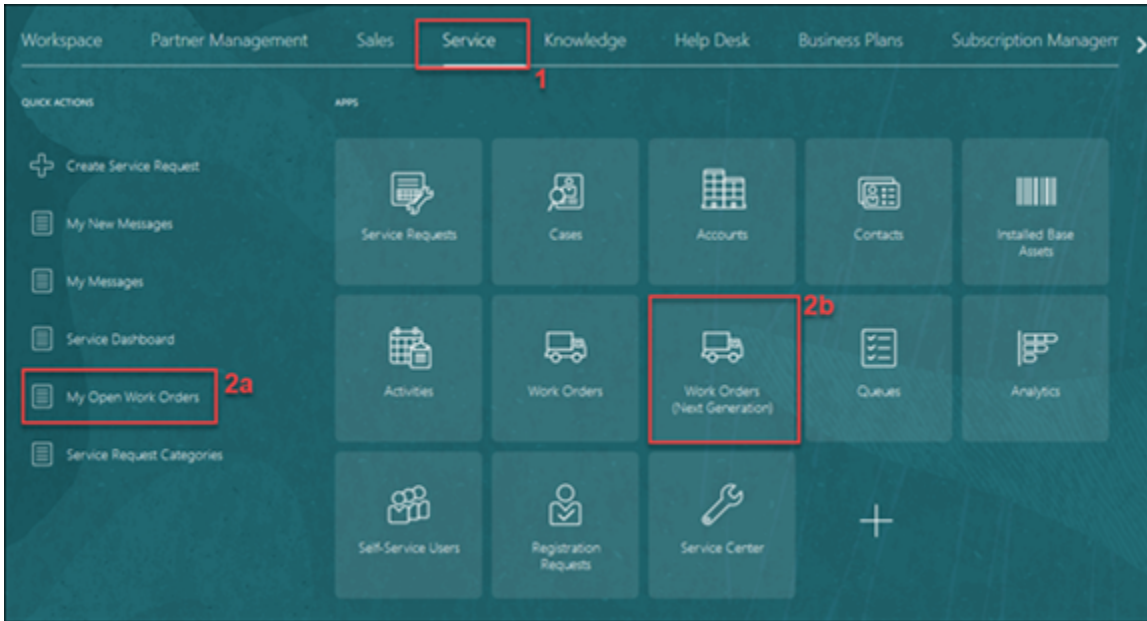
Now, you can make changes to the work order or you can add attachments.

When you're done, you can click the arrow icon next to the work order number. This returns you to the My Open Work Orders list page. If you've made edits to the work order you just created, don't forget to click **Save**.



Update a Generic Work Order

Here's how you update a generic work order.



1. Go to the Home page and select **Service** tab.
2. You can access work orders one of two ways:
 - o In the list of Quick Actions, click **My Open Work Orders** callout (2a).
 - or
 - o Click the **Work Orders (Next Generation)** tile (callout 2b).

The My Open Work Orders list page is displayed.

Reference Number	Title	Service Request	Contact Name	Account	Scheduled Date and Start Time	Status Code	Status	Contact
0000027013	Service repair for med...	SR0000...	Bonnie V...	Blue Hospitals		ORA_SVC_WO_NONE		Bonnie V.

1. Click the **Reference Number** for the work order you want to edit.

0000027014 : Replace Control Board for Medical Refrigerator Unit
Edit Work Order - Generic

Title: Replace Control Board for Medical Refrigerator Unit

Time Zone: (UTC-06:00) Chicago - Central Time (CT) | Type: [Dropdown]

Scheduled: 06/18/21 12:00 AM CDT | Resolution Due: 06/18/21 12:00 AM CDT

Remind Customer Minutes Before: 15 | Status: Scheduled

Account: Blue Hospitals | Contact: Bonnie Vickers

Phone: (309) 555-1684 | Email: [Field]

Address: [Field]

Product: Commercial Refrigerators(Unregistered) | Assigned To: Paul Henry

Case Note: Replace control board. Part in stock.

2. Make your changes.

If you're canceling the work order, select the appropriate item from the Status drop down list.

3. Click **Save**.

The work order is saved.

When you're done, you can click the arrow icon next to the work order number. This returns you to the My Open Work Orders list page.

0000027014 : Replace Control Board for Medical Refrigerator Unit
Edit Work Order - Generic

Title: Replace Control Board for Medical Refrigerator Unit

Oracle Field Service Work Orders

Create an Oracle Field Service Work Order

If your company is using work orders for both Oracle Field Service and generic work orders, the **Create Work Order** button is drop down where you can choose which of these work order types to create.

If you're using only one type of work order, the **Create Work Order** button appears with no drop down.

For this example, let's create an Oracle Field Service work order.

To learn how to create a generic work order, scroll to the previous next section of this chapter.

My Open Work Orders
Status Category Equals Open / Record Set In Assigned to me

Try searching by keyword or add a filter

Results: 6

Reference Number	Title	Service Request	Contact Name	Account	Scheduled Date and Start Time	Status	Contact	Actions
0000016018	Control Board Replace...	0000021002	Lisa Allen	Pinnacle Health	08/07/21 12:00 PM	Scheduled	Lisa Allen	No actions available
0000016019	Replace Control Board	0000019001	Lisa Allen	Pinnacle Health	09/07/21 2:00 PM	Scheduled	Lisa Allen	No actions available

The 'Create Work Order' dropdown menu is open, showing options: Generic and Oracle Field Service Cloud.

1. Click **Create Work Order** drop down and select **Oracle Field Service Cloud**.

↑ Create Work Order - Oracle Field Service Cloud Cancel Create

Title Required

Account Contact

1 Phone Email

Product Type Required

▼ Address

Country United States

Address Line 1

Address Line 2

City State Postal Code

Time Zone Required Work Order Area

Resolution Due Remind Customer Minutes Before

Requested Arrival Time Slot

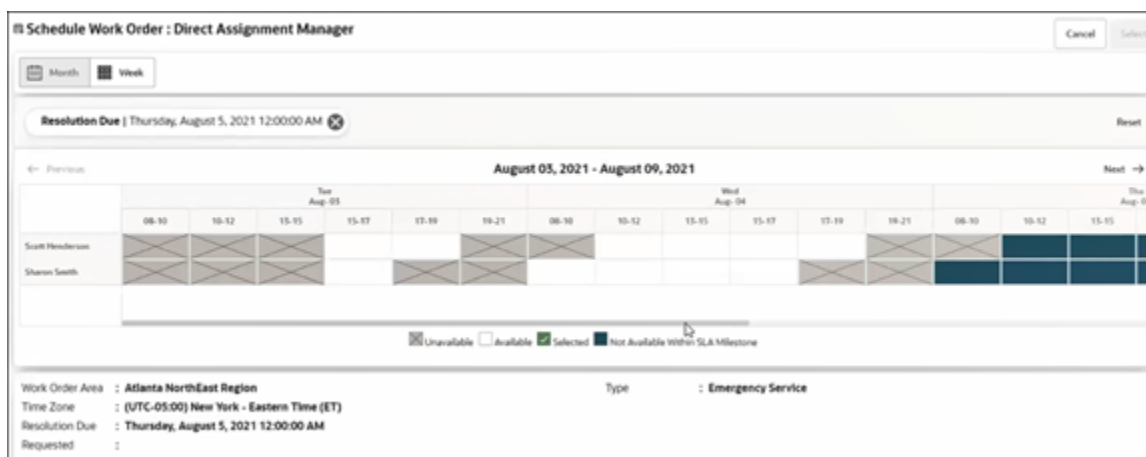
Case Note 1000 Characters remaining

Service Request Assigned To

2. Complete the work order form.

- **Title:** Descriptive name for the work order.
- **Account:** The Account for the Work Order
- **Contact:** The contacts in the drop down are filtered by the selected account. You'll only see contact names for that account.
- **Phone** and **Email** automatically populate for the contact.
- **Product:** Opens a picker where you can select an associated group, product, or asset.
- **Type:** The work order type.
- **Address:** The address information including **City, State,** and **Postal Code.**
- **Time Zone:** Time zone for the contact
- **Work Order Area:** Automatically populates based on the selected time zone.
- **Resolution Due :** The Date pickers in these fields let you select dates the work must be completed (if applicable).
- **Remind Customer Minutes Before:** The amount of time the customer should be notified before the service technician arrives.
- **Requested Time Slot:**

Opens the Oracle Field Service Scheduler in a new window.



Note: If a **Resolution Due** was added to the work order, and for example the contact wants to schedule the work outside that time frame, you can remove the **Resolution Due** filter to open the blocked dates.

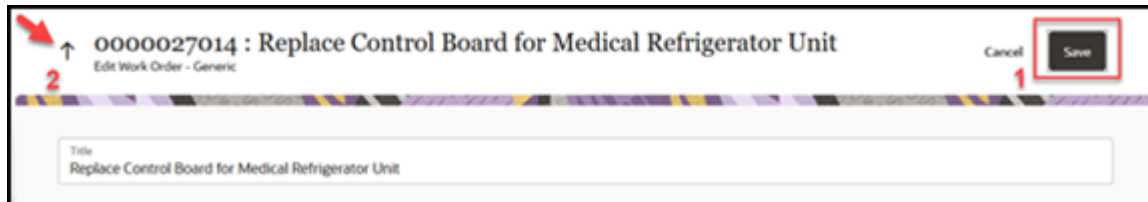
- **Case Note:** Notes for the work order.
- **Service Request:** Service Requests associated with this work order.
- **Assigned To:** The work order will automatically be assigned to you when the work order is created. You can also use the drop down to select someone else.

3. Click **Create**.

The work order is created. The Edit Work Order page is displayed for the work order you just created.

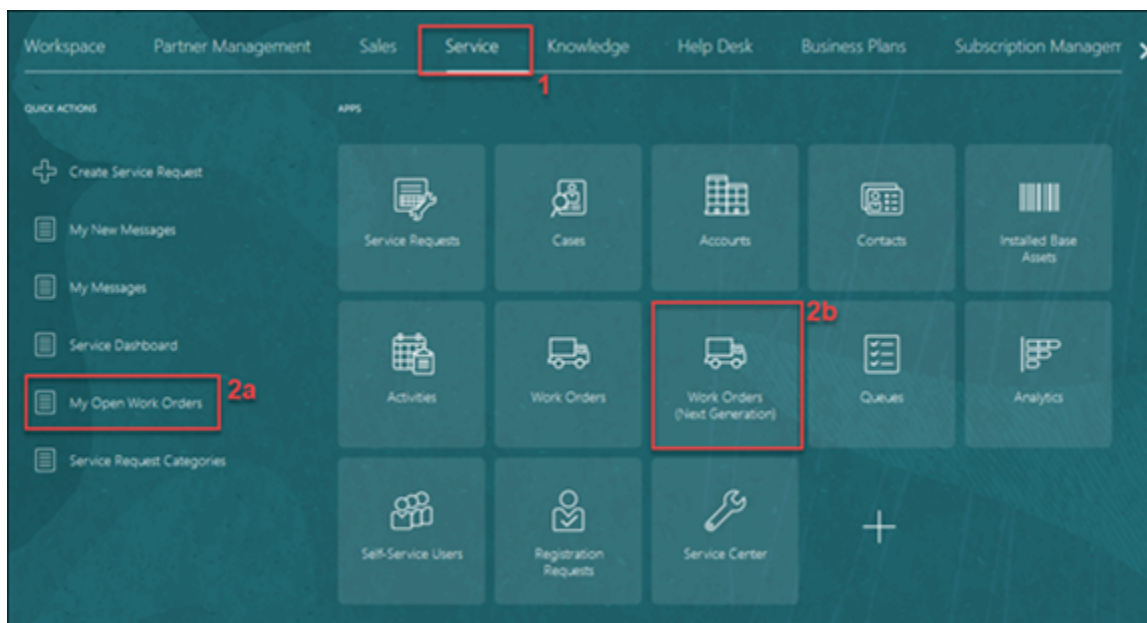
Now, you can make changes to the work order or you can add attachments.

When you're done, you can click the arrow icon next to the work order number. This returns you to the My Open Work Orders list page. If you've made edits to the work order you just created, don't forget to click **Save**.



Update an Oracle Field Service Work Order

Here's how you update a generic work order.



1. Go to the Home page and select **Service** tab.
2. You can access work orders one of two ways:
 - o In the list of Quick Actions, click **My Open Work Orders** callout (2a).
 - or
 - o Click the **Work Orders (Next Generation)** tile (callout 2b).

The My Open Work Orders list page is displayed.

The screenshot shows a table titled "My Open Work Orders" with a search bar and a "Results: 16" indicator. The table has columns for Reference Number, Title, Service Request, Contact Name, Account, Scheduled Date and Start Time, Status Code, Status, and Contact. The first row is highlighted in green and has a red box around the Reference Number "0000027013".

Reference Number	Title	Service Request	Contact Name	Account	Scheduled Date and Start Time	Status Code	Status	Contact
0000027013	Service repair for med...	SR0000...	Bonnie V...	Blue Hospitals		ORA_SVC_WO_NONE		Bonnie V

1. Click the **Reference Number** for the work order you want to edit.

The screenshot shows the "Edit Work Order" form for work order "0000020015 : Replace control board". The form includes fields for Title, Account, Contact, Phone, Email, Product, Type, Address, Time Zone, Work Order Area, Resolution Due, and Remind Customer Minutes Before. A "Cancel Work Order" button is visible at the top right.

0000020015 : Replace control board
Edit Work Order - Oracle Field Service Cloud

Cancel Work Order

Title: Replace control board

Account: Pinnacle Health

Contact: Lisa Allen

Phone: (650) 270-4151

Email: redwoodtestuser@gmail.com

Product: [Empty]

Type: Emergency Service

Address: 11660 Alpharetta Hwy #550 ROSWELL, GA 30076

Time Zone: (UTC-05:00) New York - Eastern Time (ET)

Work Order Area: Atlanta NorthEast Region

Resolution Due: [Calendar icon]

Remind Customer Minutes Before: [Dropdown arrow]

Requested Arrival Time Slot: [Calendar icon]

Scheduled Arrival Time Slot: [Calendar icon]

2. Make your changes.

If you're canceling the work order, click **Cancel Work Order**.

3. Click **Save**.

The work order is saved.

When you're done, you can click the arrow icon next to the work order number. This returns you to the My Open Work Orders list page.

The screenshot shows the "Edit Work Order" form for work order "0000027014 : Replace Control Board for Medical Refrigerator Unit". A red arrow points to the upward arrow icon next to the work order number. The form includes a Title field.

0000027014 : Replace Control Board for Medical Refrigerator Unit
Edit Work Order - Generic

Cancel Work Order

Title: Replace Control Board for Medical Refrigerator Unit

10 Service Dashboard

Service Infolets

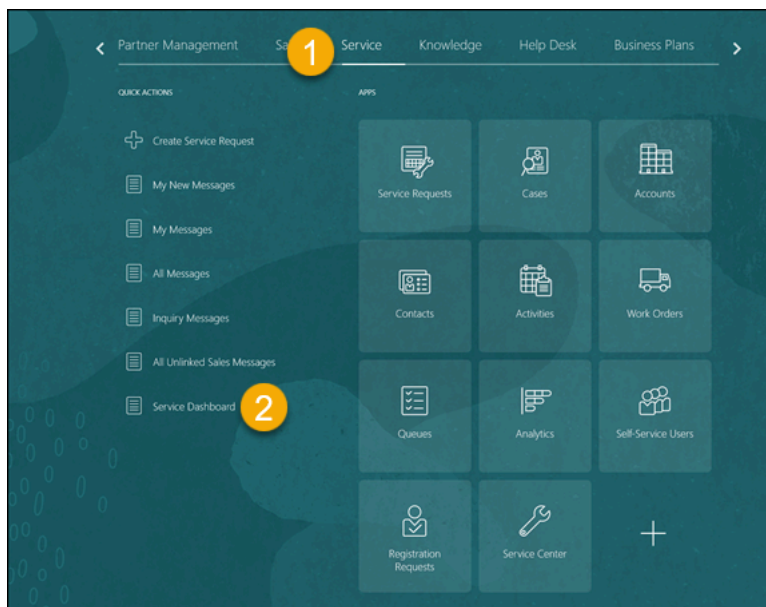
Oracle Transactional Business Intelligence (OTBI) is a real time, self-service reporting solution bundled with your service application. It provides prepackaged analytic content built on the Oracle Business Intelligence (BI) platform.

Service Dashboard provides role based visibility into the most important service health key performance indicators (KPIs) affecting your organization, through a series of tiles or infolets. From the infolets, you can drill into the underlying detailed reports. From the infolets, you can drill into the underlying detailed reports. The infolet can also display an analytic such as a bar graph or a pie chart.

Drill into an infolet, and see, for example, the Critical Service Requests infolet which shows a list of individual SRs with their Reference Number, Title, Status, Assignee, and other relevant information. You can then navigate to individual records of the business objects displayed on a detailed report. For example, by clicking on the SR Reference Number you can navigate to the SR detail page and perform any updates to the SR and navigate back to the dashboard to resume analysis. The Service Dashboard can also be personalized to suit your preferences. Hide or show out of box infolets, or change the order of display of the infolets.

Here's how you navigate to the Service Dashboard page:

1. On the Home page, click the **Service** tab (callout 1 in the screenshot).
2. In the **Quick Actions** column, click **Service Dashboard** (callout 2).



The Service Dashboard page is displayed.

If you're a customer service representative, you'll see the following infolets:

Infolet	Description
My Resolve Time	Shows the average time you took to resolve assigned service requests over a 30 day period. It enables you to view that information against the average time taken by all agents to resolve service requests over the same period of time.
Pending Tasks	Displays the pending tasks that are assigned to you along with the priority (high, medium, or low) of each. You can also view tasks that are past their due date.
Waiting on Customer	Displays an overview of the service requests that are waiting on the customer. You can view the following information: <ul style="list-style-type: none"> • Number of service requests in Waiting status. • Number of service requests that are resolved. • Total number of service requests assigned to the user, which includes both resolved requests and requests waiting on the customer. • Total number of critical service requests assigned to the user, which includes both resolved requests and requests waiting on the customer.
Waiting on Me	Displays an overview of the service requests that are waiting on the user. The infolets contain the following information about the service requests waiting on the user: <ul style="list-style-type: none"> • Number of new service requests. • Number of service requests that are in progress. • Total number of service requests that are awaiting a response from the user and are in progress. • Total number of unresolved service requests that are assigned to the user and are in critical status.

If you're a customer service manager, you'll see the following infolets:

Infolet	Description
Agents with Most Pending Service Requests	Displays the top-three agents that have the most pending service requests, and the number of service requests that are pending. Pending service requests are requests that are in New or In progress state, and are pending action by the agent. These requests don't include the requests that are waiting on the customer.
Critical Service Requests	Shows the average resolution time of the service requests resolved in the last 30 days, by any user in the signed-in service manager's team.
Long Wait on Agent	Shows the number of service requests that are waiting on the agent for longer than 24 hours.
Queues by Unassigned Service Requests	Shows the number of unassigned service requests in each queue. The graph also displays the priority of the service requests in the queues.
Team Resolve Time	Displays the average resolution time of the service requests resolved in the last 30 days, by any user in the signed-in service manager's team. The time is displayed in the number of days, hours, and minutes.

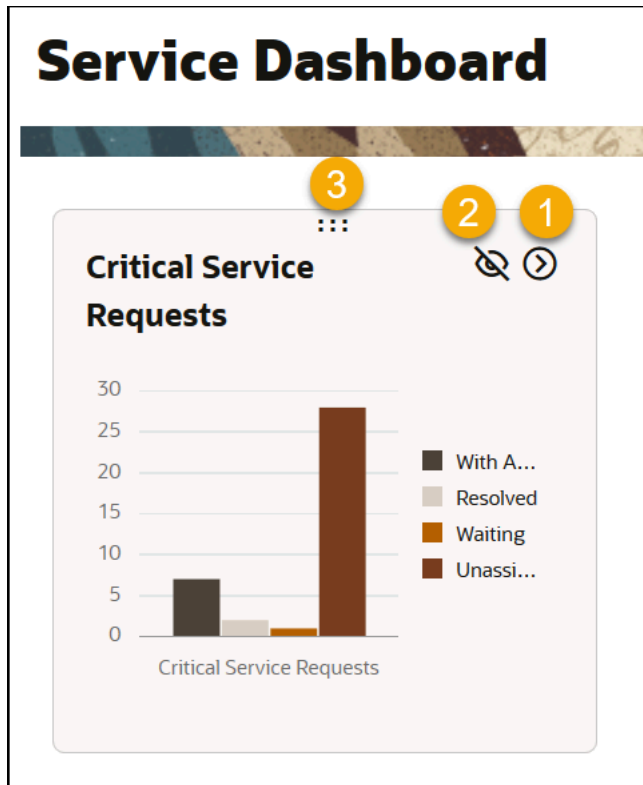
Work with Infolets

Here's the different ways to work with the infolets.

Drill into a Detailed Report

Here's how you can drill into a detailed report:

1. On the Service Dashboard page, click **Navigate to detail** (callout 1 in the screenshot) for the infolet you want to view the detailed report.



The detailed report page is displayed for the selected infolet.

Reference Number	Title	Status	Severity	Last Updated Date
0000028035	LiquidPump-03	New	High	05/03/2021 05:24 PM
0000020016	Unable to connect to new cloud database	Waiting	High	04/28/2021 03:43 PM
https://atlas-stage.oracle.com/ids/f/service/11.13.21.040_210407154857215/P	to visit for pump replacement	In Progress	Medium	04/28/2021 12:44 AM

- o In the Search bar, you can search for any related service request by the service request **Reference Number**, **Title** (or keywords), **Status**, and **Severity**.
- o You can sort the list of related service requests by any column, using the sort controls on the list header row.
- o From the list of related service requests, click any service request **Reference Number** link to view the service request's details.

The Service Request Foldout View is displayed, which has different panels related to the record you are viewing, each with key information.

- To return to the detailed report page, click the **Service Dashboard** title.
- To return to the Service Dashboard page, click the **Service Dashboard** title.

Personalize the Infolets Displayed

You can personalize the Dashboard display, by hiding any of the ready-to-use infolets, and by adding custom infolets. The customizations you perform are available only to you, and are specific to the browser you use.

Here's how you can personalize the infolets displayed:

1. To add any ready-to-use and custom reports from the shared folders in BI Catalog (including the **Custom** folder):

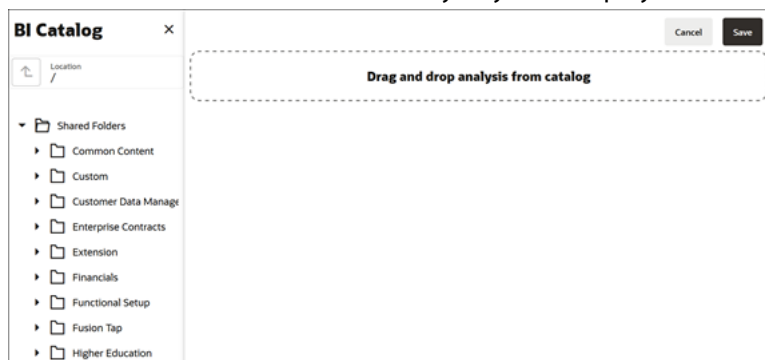
- a. On the Service Dashboard page, click **Configure**.

The **Browse Catalog** section is displayed.

- b. Click **Browse Catalog**.

The **BI Catalog** pane is displayed.

- Administrator-defined or user-defined content is displayed in the **Shared Folders > Custom** folder.
- Personal content available only to you is displayed in the **My Folders** folder.



- c. Navigate to the folder and report you want to add.
- d. Select a tile report and drag it to the **Drag and drop analysis from catalog** section.

Only the tile reports prefixed with **Tile** in their names (in the BI Catalog) are displayed for selection.

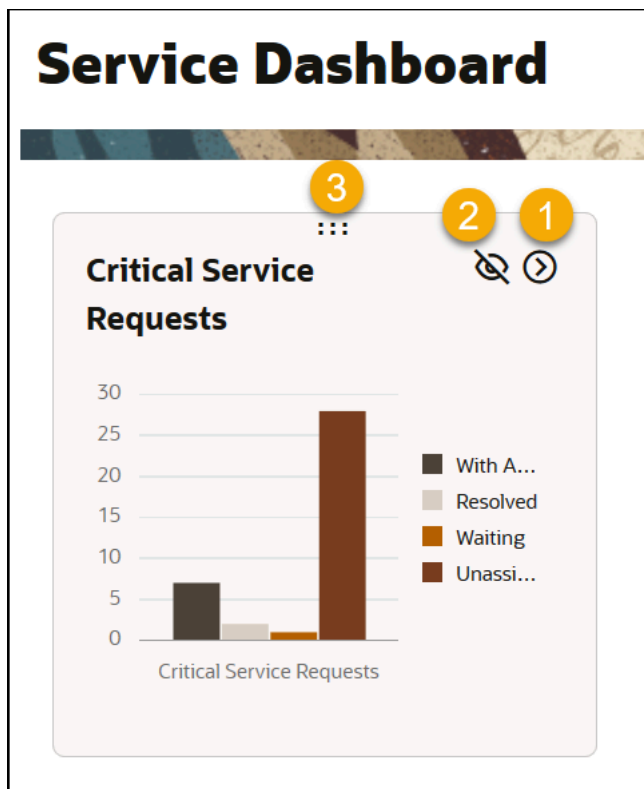
The **Infolet Properties** window is displayed.

- e. Specify the properties to suit your display requirements, and click **Submit**.

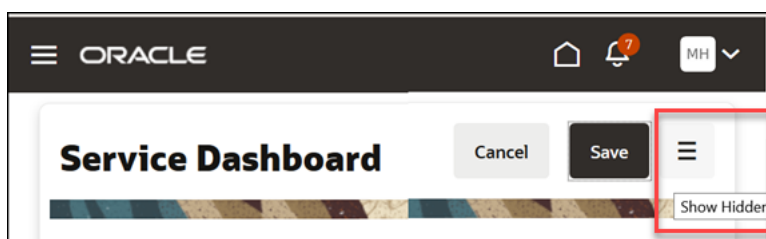
The infolet is displayed on the Service Dashboard page.

- f. Click **Save**.

2. To hide an infolet on the Service Dashboard page:
 - a. Click **Hide** (callout 2 in the screenshot) for the infolet you want to hide.



- b. Click **Save**.
3. To view the hidden infolets, click **Show Hidden** (highlighted in the screenshot).



The hidden infolets are displayed grayed out.

- a. Click **Unhide** for the infolet you want to show.
 - b. Click **Save**.
4. To rearrange the infolets displayed on the Service Dashboard page:
 - a. Point to the 6 dots icon (callout 3 in the previous screenshot) and drag the infolet to change its position.
 - b. Click **Save**.