

Oracle Digital Experience for Communications

Using Care Experience

April 2023



Oracle Digital Experience for Communications
Using Care Experience

April 2023

F77906-01

Copyright © 2023, Oracle and/or its affiliates.

Author: Tejaswi Tatavarthi

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software, software documentation, data (as defined in the Federal Acquisition Regulation), or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software," "commercial computer software documentation," or "limited rights data" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed, or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle®, Java, and MySQL are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

Contents

Get Help	i
<hr/>	
1 About This Guide	1
Audience and Scope	1
Related Guides	1
2 Overview of Care Experience	3
Introducing Care Experience	3
3 Dashboards	7
How You Navigate To Dashboards	7
Customer 360 Dashboard	7
Billing Dashboard	8
Order Care Dashboard	10
Offer Recommendations	10
Churn Propensity	11
4 Bill Details	13
View and Manage Bill Details	13
Compare Bills	14
5 Bill Adjustments and Disputes	17
Manage Bill Events Adjustment Requests	17
Manage Bill Item Adjustment Requests	18
Manage Bill Total Adjustment Requests	20
Dispute Bills	21
Submit Bill Adjustments and Dispute Amounts Exclusive of Taxes	22
6 Noncurrency Bill Adjustments	23
Overview of Noncurrency Bill Adjustments	23
Manage Noncurrency Bill Unit Allowance Adjustment Requests	23

7	Account Receivables	25
	View Account Receivables List	25
	View Account Receivables Details for Adjustments	25
8	Payments	27
	View Payments History and Allocate Payments	27
	Capture Payments	27
	Integrate with Oracle Fusion Payments	28
9	Contacts	29
	Agent Assisted Contacts Management	29
	View and Edit Contact Profiles	29
10	Orders	31
	View and Manage Orders	31
	View and Manage Customer Order History	32
	Manage Orders from Order Details Header	32
11	Subscription Care	33
	Agent Assisted Subscription Care	33
12	Subscription Accounts	35
	Overview of Subscription Accounts	35
	Create Subscription Accounts	35
	Delete Subscription Accounts	36
	Work with Profiles	37
	Work with Addresses	38
	Work with Billing Profiles	38
	Work with Relationships	39
	Work with Attachments and Notes	40
	Work with Subscription Account Management Roles	40
13	Oracle Digital Assistant	41
	Overview of Oracle Digital Assistant	41

Order Care Skill

41

14 Agent Assisted Buying

43

Overview of Agent Assisted Buying

43

View, Search, and Compare Offers from the Catalog

43

Manage Price Lists, Catalogs, and Customer Types

44

Configure Product Offers

44

Checkout and Submit Order

46

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

If you're looking for information about performing day-to-day tasks in your Care Experience Application, then this guide is for you. The information is primarily aimed at customer service representatives.

This guide describes the functionality and user flows.

Related Guides

Refer to the related guides listed in this table to understand more about flows and functions covered in this guide.

Guide	Description
Oracle Digital Experience for Communications Implementing Care Experience	This guide describes the tasks to set up Care Experience.
Oracle CX Service Using Fusion Service	This guide describes how to use service features and components in Oracle CX Service.

Related Topics

2 Overview of Care Experience

Introducing Care Experience

Using Care Experience, you can completely transform the way customer support is delivered by providing digital omnichannel customer care with comprehensive industry-specific processes for both assisted and unassisted channels.

Through this application, you can enable customers to interact through the channel of their choice by providing prebuilt and integrated experiences for call center agents as well as unassisted channels such as digital assistants.

Core capabilities include:

- **Intelligent 360 customer service:** You can provide agents with smart, and context-aware customer 360 dashboards. The dashboards deliver personalized and guided experiences to efficiently and effectively resolve all types of customer inquiries.
- **Industry-specific tasks:** You can integrate different processes using TM Forum (TMF) Open APIs. The application enables agents and customers to resolve inquiries related to billing, ordering and subscription care.

As a customer service representative, here are some examples of your journeys.

User Journey	For more information
<p>As a customer service representative, you receive a call from the customer and the screen displays the relevant dashboard to help resolve the customer inquiry.</p> <ul style="list-style-type: none"> • Your Customer 360 Dashboard shows information about assets, bill unit balances, service requests, and account receivables related to the customer. • Your Billing Care Dashboard shows additional billing information to inform the agents about the customer's current bill status and payment history. • Your Order Care Dashboard enables customer service representatives to view order information on behalf of a customer to resolve order care inquiries. You can view order summary information, historical order information, and order summary. 	<p>Dashboards > How You Navigate To Dashboards</p> <p>Dashboards > Billing Care Dashboard</p> <p>Dashboards > Customer 360 Dashboard</p> <p>Dashboards > Order Care Dashboard</p>
<p>You, as a customer service representative, can view Payment and Bill history to address customer's inquiries on billing and payment. Both the searching and filtering capabilities enable you to retrieve relevant information related to the customer's query.</p>	<p>Payments > View Payments History and Allocate Payments</p>

User Journey	For more information
The customer inquires about the current usage to make the payment. You can view unbilled usage and generate a new bill for this period.	Payments > Capture Payments
Agent views a specific bill, views account, and service level charges to address customers inquiry about reasons for the high bill. You can compare bills from multiple periods showing an increase or decrease in amount across those selected bills.	Bill Details > Compare Bills
A customer wants to pay a bill, you can search for the relevant bill and take payment.	Payments > Capture Payments
The customer has an outstanding bill due but has made the payment. You can allocate payments across multiple bills.	Payments > View Payments History and Allocate Payments
The customer has an issue with dropped calls or is charged for download that didn't happen. You can create an adjustment request.	Bill Adjustments and Disputes > Manage Bill Events Adjustment Requests Bill Adjustments and Disputes > Manage Bill Item Adjustment Requests Bill Adjustments and Disputes > Manage Bill Total Adjustment Requests
The customer raises a dispute and you can then initiate the dispute. You can create dispute on the total bill, bill charge, and bill events.	Bill Adjustments and Disputes > Dispute Bills
The customer asks for assistance to update contact and profile information. You can view and edit information on the relationships between the customer and other parties. This information is displayed on the contact details page that you can access from the landing page.	Contacts > Agent Assisted Contacts Management
The customer asks for assistance to suspend, resume, or suspend a subscription. You can perform these actions on behalf of the customer and at the same time explain any applicable early termination fees.	Subscription Care > Agent Assisted Subscription Care
The customer asks for assistance to cancel an in-flight order. You can cancel the order from the order summary tile or from the order details view.	Orders > View and Manage Orders

As a customer service manager, you can perform all the tasks associated with a customer service representative. Additionally, you can review and approve, reject, or edit adjustment requests above the agent threshold level. For more information see Bill Adjustments and Disputes.

3 Dashboards

How You Navigate To Dashboards

As a customer service representative, here's how you can navigate to dashboards:

- Use CTI call routing.
- Use Workspaces and navigate from contacts.

CTI Call Routing

Care Experience uses Computer Telephony Integration (CTI) to enable agents to interact with customers through the telephony channel. Here's how the CTI call routing helps the customer service representatives to take calls and address customer queries.

1. A customer makes an inbound call to the agent. This customer could be using an existing phone number and the CTI identifies the phone number of the customer.
2. The application then returns information about the caller.
3. Next, the routing rules that are predefined determines which agent must receive the call. After the appropriate agent is selected, the call is diverted to the agents by a soft phone or by ringing a traditional handset.
4. After the agent accepts the call, a dashboard is displayed to the agent based on the nature of the inquiry indicated by the customer. If it's a billing query, the Billing Care dashboard is displayed and for other queries, the customer service representative is presented with the Customer 360 dashboard. The service representatives can use these dashboards to resolve the caller's problem.

With this approach, the resolution time is reduced because the customer service representative doesn't lose time in navigating through multiple views in the application to find the relevant information.

Navigation from Contacts

Here are the steps to navigate to the different dashboards.

1. Go to **Navigator > Service > Contact Center**.
2. On the Workspace page, select a contact from the list.
3. Corresponding to the customer account, click **Actions**, and then click **Customer 360 Dashboard**, **Billing Care Dashboard**, or **Order Care Dashboard** based on the customer inquiry.

Customer 360 Dashboard

As a customer service representative, you can do these tasks from the Customer 360 dashboard.

- View and manage assets.
- View and manage bill unit balances.

- View and manage service requests.

View and Manage Assets

Use the Assets section to view the assets for which the customer is the primary party to the asset's owner account, service account, or billing account. Here you can only view simple offers, service bundle offers, and assets that are either active or suspended, or inactive for three months or less. You can also suspend, resume and cancel subscription of assets.

Here's how you can access the assets and view the complete details of service assets and goods assets.

1. On the Customer 360 Dashboard page, go to the Assets section. Click any asset to view its complete details.
2. To view the bill associated with the asset, go to Actions and click **View Bill** from the list. The bill details view in which the asset is billed opens.
3. To take a payment for the account associated with the asset, go to Actions, and click **Take Payment** from the list.

Note: You can only view the Take Payment and View Bill options for the caller who's the primary party of the billing account of the asset.

View and Manage Bill Unit Balance

Bill unit balance section shows billing information for each bill unit associated with the Contact's billing accounts. For each bill unit, the current balance amount is displayed.

You can also view payment due date or overdue information.

1. On the Customer 360 Dashboard page, go to the **Bill Unit Balance** section.
2. Go to **Actions** and you can view the bill, take payment, and view payment history.

View and Manage Service Requests

As a customer service representative or a manager, you can view the service requests from the Customer 360 dashboard. Up to five service requests associated with the contact and in open status are displayed. Critical and recently updated requests are displayed first. You can open all service requests from the link provided on the panel of the dashboard.

Each service request displays a summary of information including its criticality, status, title, and last update date.

1. On the Customer 360 dashboard page, go to Service Requests section.
2. Click a service request to go to the details page. The information differs between specialized billing adjustment requests and generic service requests. You can view the service requests related to different bill units raised either by a customer service representative or a manager.

Billing Dashboard

As a customer service representative, you can do the following tasks from the billing care dashboard.

- View bill history.

- View payment history.
- View unbilled usage.
- View recent bills.
- View account receivables.
- View service requests.

View Bill History

From the bill history tile, you can view the bill history graph that shows the bills for the previous six months. Each dot denotes bills for a particular month. By default, the latest month is highlighted.

- Click the title header to view the full bill history.
- Click the amount to view the bill details or the list of bills, if there are multiple bills in a month.
- Click the month to change the amount displayed.

Here's what you can do on a bill:

- Adjust bill total
- View bill payments
- View bill image
- Compare bills

Note: Bill history tile information varies with the billing profile that you select.

View Unbilled Usage

Use unbilled usage to view the data consumption or the service associated with the billing profile for the current billing period.

- Select the billing profile to view its unbilled usage.
- On the Unbilled Usage tile, you can do the following:
 - View the usage period that displays the on-going billing cycle period.
 - View the total Bill in Progress amount.
 - Click the Amount to open the Bill in Progress view.
 - View the noncurrency balance for up to three usages. When there are more than three usages for the Bill Unit, click the tile header to display the full list.

Bill Now

You can use the Bill Now action to generate a bill for the service used since the last bill was generated up to the current date or unbilled usage.

1. Click **Billing Care Dashboard**.
2. Select a bill unit from the drop-down list to make the payment, and click the **Usage** tile.
3. On the Bill In Progress page, click **Bill Now**.

View Payment History

- From the payment history tile, you can view the payment history trend that shows the payments for the last six months. Each dot on the graph denotes the payments made in that month. By default, the latest payment made is highlighted.
- Click any month on the graph to display the total payment amount. Drill down on the amount to view the payment history of that specific month.
- Click the payment amount to view the details of payment. From the payment detail view, you can get detailed payment information like payment ID, transaction ID, amount, and allocation details.
- Click **Payment History** and see a complete history of the payments for the billing profile.

Note: Bill history tile information varies with the billing profile that you select.

View Account Receivables

Go to the Account Receivables section and click any tile to view the complete details of bill adjustment account receivables.

View Service Requests

Here you can see billing and non-billing open service requests on the billing dashboard. You can see the billing-related open service requests ordered by the last updated date.

For example, assuming there are 2 open billing adjustments service requests, one dated May 1st and the other July 1st, and 10 non-billing open service requests dated in June, then you would see the two billing service request first, followed by the non-billing service requests and up to the limit of tiles displayed on the dashboard.

Order Care Dashboard

As a customer service representative, you can do the following tasks from the order care dashboard.

- View and manage orders
- View customer order history
- Inquire about a specific order
- View order details
- Cancel in-progress orders

Offer Recommendations

Recommended offers are presented to enable customer service agents to increase revenue, reduce churn and increase customer satisfaction.

The offers recommended are contextual to the customer based on their likelihood to purchase. Here's how offers are managed:

- Recommend and present relevant offers to agents based on customer details.
- Provide intelligent recommendations about relevant products and services for a specific customer.

As an agent you can:

1. View recommended offers for a customer that appear on the Spotlight panel of the Customer 360, Billing Care, or Order Care dashboards.
2. Click **Recommended offers** link to navigate to the Offers Catalog page, which is prefiltered to display the recommended offers along with their rank.

Note: The tenant configuration specified by the application administrator determines whether the recommended offers link is displayed or not and how many offers are displayed. See Configure Tenant topic in the Implementing Care Experience guide.

3. Use the recommended filter available on the Offers Catalog page, to display recommended offers.

If you clear the recommended search filter then all offers are displayed.

4. Switch to the list view to view the rank as an additional column.

Churn Propensity

Churn propensity prediction provides insight to agents on the propensity for a customer to churn. It is based on the churn propensity score and displayed on the spotlight in the different dashboards. There are 5 status indicators: very low, low, medium, high, and very high.

As an agent you can:

1. View the churn propensity indicator displayed on the Spotlight panel of the Customer 360, Billing Care, or Order Care dashboards to understand the likelihood of a customer moving to a different provider.

Note: The tenant configuration specified by the application administrator determines whether the churn propensity indicator is enabled or not. See Configure Tenant topic in the Implementing Care Experience guide.

2. Modify interaction with customers based on their likelihood to churn.
 - High Propensity to Churn: Agents can focus on why a customer might be looking to churn and address these issues wherever possible such as outstanding service issues that need to be resolved, move them to a different plan, upgrade their device, and renew their contract.
 - Low Propensity to Churn: Agents can focus on keeping the customer satisfied and proactively suggest upgrades, for example.

Note: The churn propensity indicator is not displayed when there is no data available for the customer.

4 Bill Details

View and Manage Bill Details

As a customer service representative, you can quickly access and view the bills generated for customers to answer their questions on billing.

From the dashboard, you can view the Bill Summary Information for each of the multiple bills that the customer may receive. Using the Bill Summary on the dashboard, you can open the bill details view to see the most recent bill generated for the customer. You can also view the entire bill and select a previous bill period to view the bill generated for that period. The various amounts that you see are inclusive of taxes. Wherever applicable, click the tool tip to see the included tax amount.

Bill Unit and Billing Profile

A billing unit relates to a time series of bills for a set of communication services (Assets). For every bill period, also known as bill cycle, a bill is generated for the set of services.

The services that a customer receives may be charged in different bill units. In this case, the customer receives more than one bills for the use of the services in a specific time period. A billing unit is mapped to a billing profile.

Note: When the bill is subject to an unsettled dispute, then you can see the badge **Disputed** next to the Bill ID.

Bill Charges

Any bill is classified into two types:

- **Service Charges:** Service charges are related to the use of communications services. For example, wireless, broadband, and landline.
For a particular service, service charges are broken down onto bill items. For example, monthly fixed charges, usage-based charges for minutes or data used, domestic or international use of the services, use of specific service features, and so on.
Bill Item amounts are represented by events and related unit charges that are defined based on the definition of the terms of service. For example, an event could be a number of peak-time minutes of use, which are charges at a peak time price per minute
- **Account Charges:** Account charges aren't directly related to the use of a particular service. Few common examples of account charges include account setup, installation fees, and regulatory fees.

A customer service representative discusses with customers their billing charges up to the bill items. Event-level definitions of bill items are accessed and managed by customer service managers.

Bill Charge History

Here you can see the various bill items applied to the charge, since the bill was generated. These may include billing adjustments, settled disputes, and bill payments. To see the bill charge history, on the Bill Details page, from the relevant bill line click **Actions > View Charge History**.

Accounting Methods

Communications Service Providers will use either the balance forward or the open item accounting method. Let's understand what's the key difference between these two accounting methods on a bill.

Accounting Method	Description
Balance Forward Method	Any bill in a billing cycle includes the previous amount due. The bill total is the sum of those charges. When a bill is unpaid, the past amount due would increase and this results in the next bill total increase.
Open Item Method	Any bill in a billing cycle includes the account and service charges for that cycle. All the previous amount of dues are excluded from the bill total. The previous due amounts are still reflected on the balance for the billing unit but not carried over from one bill to the other.

View Original and Current Charges

On the Bill Details view you can see both the original and the current charges. As a customer service agent when you select a charge for adjustment, the charge that you see is the current charge that may differ from the amount in the previous view.

Go to the history view to see the various charges applied on the bill, for example, payment, adjustments, and so on. When the bill is subject to an unsettled dispute, then dispute badge is shown besides the bill ID.

About Bill Dispute

The disputed billing data are stored in your billing application. You don't need to create an manage a request to raise a bill dispute. You can directly initiate a bill dispute using the bill detail user interface.

Here's how you can raise a bill dispute:

- At the bill total level, click **More > Dispute Bill Total**.
- At the bill item level, click **Action > Dispute Charge**.
- At the bill item level, click **Action > Dispute Events**.

The value of the **Charge Before Dispute** is the sum of the currency amount of the selected events.

You can't raise disputes on bills that have unsettled bill disputes or the total amount on the bill or bill item is zero.

Compare Bills

Use this feature to view bill totals and select different bills for comparison.

Here are some possible scenarios that can qualify for a bill comparison.

- Some usage data might have changed from one cycle to another cycle.
- Charges for new services may have been added or charges for terminated services removed.

Compare Bills

You must sign in as a customer representative to do this task.

1. Click **Compare Bills** in the Actions available for Bill Details and Bill History records throughout the application.

Note: The compare bills button is enabled only when you have 3 or more bill cycles for that bill unit.

2. On the Bill Comparison page, you see the current bill and the last two bills for a quick comparison.
3. From the period selector, you can select specific bills with contrasted bill totals for comparison. You can explain the variation in charges, including charges for modification of service which contributes to the larger amount.

Note: Your implementor can configure the length of the period covered by the Bill Period selector. For example, limit the billing periods for selection to the latest 3 years, or last 4 calendar years, and so on.

4. On the Bill Comparison page, you can click **Actions**, and then click **Download bill** to download a PDF version of the bill.
5. You can click **View Bill** to view the complete details of the bill.

5 Bill Adjustments and Disputes

Manage Bill Events Adjustment Requests

As a customer service representative, you receive a request from the customer to adjust the bill amount for one or more events in the billing charge.

You can negotiate the adjustment amount and submit the adjustment to billing for processing, if the amount is within your approved threshold amount. In case the adjustment request amount is greater than the threshold amount, the request is then directed to a customer service manager. As a customer service manager, you review the events adjustment request. Then decide to either edit the requested amount, approve the amount requested, or reject the adjustment request.

Initiate a Bill Events Adjustment Request

You must sign in to the application as a customer service representative or customer service manager.

1. On the Billing Care Dashboard page, go to the **Bill Details** view.
2. Select the billing period from the Period drop-down list.
3. Identify the bill item that you want to adjust. Go to **Actions** and then select **Adjust Events**.
4. Select the specific events you want to adjust.
5. View the charge amount for the selected amounts and set the adjustment amount, the tax treatment of the adjustment, select an adjustment reason, and enter any comments as needed.

As you work on setting up the adjustment request, you can check that there are no duplicate requests being set up by other agents. You click **Related Requests** link on the page to open any existing requests created for the same bill and not yet submitted.

When you create an Adjustment Request, a Service Request of category Bill Adjustment is created with its related Adjustment Request extensions. You can save an adjustment request before it's submitted and reopen it later to continue working on it. You can also Cancel an Adjustment request after it's created and before it's submitted.

Note: The Tax Only adjustment amount is calculated once you have submitted the adjustment request and the request is processed by the billing application. You can't enter the adjustment amount, once you have selected Tax Only.

Assign a Billing Adjustment Request

After you initiate and create a bill adjustment service request, and before you submit it for processing, you can assign the request to other users.

1. Go to the Service Requests category in the unspecified dashboard.
2. Click the service request that you created for the adjustment request.
3. On the Set Adjustment page, select the user from Assigned To drop-down list, and then click **Save**.

Review and Submit Billing Adjustments

After you set the requested adjustment amount and complete the necessary information, you can review your request before you proceed to submit it.

1. On the Review Before Submit page, verify the adjustment amount you requested.
2. Verify the complete adjustment request information, and click Submit.

If the adjustment amount is less than the threshold, then the adjustment is processed for billing.

Customer Service Manager Actions

As a customer service manager, if the adjustment amount is more than the threshold for the bill due, you can do the following tasks on the requested bill events adjustment:

Task	Description
Review Bill Adjustment Request	<p>As a customer service manager, you can either select a service request in a queue or open the service request assigned to you by another customer service representative or a manager.</p> <ol style="list-style-type: none"> 1. Go to the Service Requests section and select the adjustment request assigned. 2. You see the summary view of the bill adjustment submitted by the agent. 3. From the Bill Adjustment panel, you can click the bill number to view bill details and the billing history.
Edit Adjustment Request	<ol style="list-style-type: none"> 1. Click Edit to modify the adjustment request information. 2. On the Edit Bill Adjustment page, you can edit the adjustment amount, tax information and add any additional comments if needed. 3. Click Approve and then click Continue.
Approve Adjustment Request	Click Approve when you agree to the request created by the agent, without any changes.
Submit Adjustment Request	<ol style="list-style-type: none"> 1. After you click Continue, you see the summary view of the approved request. 2. On the Review Before Approval page, verify the information, and click Submit.
Reject Adjustment Request	Click Reject when you disagree with the request to adjust the bill charges, even for a different adjustment amount. You must enter a reason for rejecting the request.

Manage Bill Item Adjustment Requests

As a customer service representative, you receive a request from the customer to adjust the bill amount for a specific billing charge.

You can negotiate the adjustment amount and submit the adjustment to billing for processing, if the amount is within your approved threshold amount. In case the adjustment request amount is greater than the threshold amount, the request is then directed to a customer service manager. As a customer service manager, you review the events adjustment request. then decide to edit the requested amount, approve the amount requested, or reject the adjustment request.

Initiate a Bill Item Adjustment Request

You must sign in to the application as a customer service representative or customer service manager.

1. On the Billing Care Dashboard page, go to the **Bill Details** view.
2. Select the billing period from the Period drop-down list.
3. Identify the bill item that you want to adjust. Go to **Actions** and click **Adjust Bill Charge**.
4. On the Set Adjustment page, set the adjustment amount, the tax treatment of the adjustment, select an adjustment reason, and enter any comments as needed.

As you work on setting up the adjustment request, you can check that there are no duplicate requests being set up by other agents. You click the Related Requests link on the page to open any existing requests created for the same bill and not yet submitted.

When you create an Adjustment Request, a Service Request of category Bill Adjustment is created with its related Adjustment Request extensions. You can save an adjustment request before it's submitted and reopen it later to continue working on it. You can also cancel an adjustment request after it's created and before it's submitted.

Assign a Billing Adjustment Request

After you initiate and create a bill adjustment service request, and before you submit it for processing, you can assign the request to other users.

1. Go to the Service Requests category in the unspecified dashboard.
2. Click the service request that you created for the adjustment request.
3. On the Set Adjustment page, select the user from Assigned To drop-down list, and then click **Save**.

Review and Submit Billing Adjustments

After you set the requested adjustment amount and complete the necessary information, you can review your request before you proceed to submit it.

1. On the Review Before Submit page, verify the adjustment amount you requested.
2. Verify the complete adjustment request information, and click Submit.

If the adjustment amount is less than the threshold, then the adjustment is processed for billing.

Customer Service Manager Actions

As a customer service manager, if the adjustment amount is more than the threshold for the bill due, you can do the following tasks on the requested bill events adjustment:

Task	Description
Review Bill Adjustment Request	<p>As a customer service manager, you can either select a service request in a queue or open the service request assigned to you by another customer service representative or a manager.</p> <ol style="list-style-type: none"> 1. Go to the Service Requests section and select the adjustment request assigned. 2. You see the summary view of the bill adjustment submitted by the agent. 3. From the Bill Adjustment panel, you can click the bill number to view bill details and the billing history.
Edit Adjustment Request	<ol style="list-style-type: none"> 1. Click Edit to modify the adjustment request information.

Task	Description
	<ol style="list-style-type: none"> On the Edit Bill Adjustment page, you can edit the adjustment amount, tax information and add any additional comments if needed. Click Approve and then click Continue.
Approve Adjustment Request	Click Approve when you agree to the request created by the agent, without any changes.
Submit Adjustment Request	<ol style="list-style-type: none"> After you click Continue, you see the summary view of the approved request. On the Review Before Approval page, verify the information, and click Submit.
Reject Adjustment Request	Click Reject when you disagree with the request to adjust the bill charges, even for a different adjustment amount. You must enter a reason for rejecting the request.

Manage Bill Total Adjustment Requests

As a customer service representative, you receive a request from the customer to adjust the total amount for a specific bill. You can negotiate the adjustment amount and submit the adjustment to billing for processing, if the amount is within your approved threshold amount.

Initiate a Bill Adjustment Request

You must sign in to the application as a customer service representative or a customer service manager.

- On the Billing Care Dashboard page, go to the Bill Details view.
- Select the billing period from the Period drop-down list.
- Identify the bill item that you want to adjust, and then click **Adjust Bill Total**.
- On the Set Adjustment page, set the adjustment amount, the tax treatment of the adjustment, select an adjustment reason, and enter any comments as needed.

As you work on setting up the adjustment request, you can check that there are no duplicate requests being set up by other agents. You click the Related Requests link on the page to open any existing requests created for the same bill and not yet submitted.

When you create an Adjustment Request, a Service Request of category Bill Adjustment is created with its related Adjustment Request extensions. You can save an adjustment request before it's submitted and reopen it later to continue working on it. You can also Cancel an Adjustment request after it's created and before it's submitted.

Assign a Billing Adjustment Request

After you initiate and create a bill adjustment service request, and before you submit it for processing, you can assign the request to other users.

- Go to the Service Requests category in the unspecified dashboard.
- Click the service request that you created for the adjustment request.
- On the Set Adjustment page, select the user from Assigned To drop-down list, and then click **Save**.

Review and Submit Billing Adjustments

After you set the requested adjustment amount and complete the necessary information, you can review your request before you proceed to submit it.

1. On the Review Before Submit page, verify the adjustment amount you requested.
2. Verify the complete adjustment request information, and click Submit.

If the adjustment amount is less than the threshold, then the adjustment is processed for billing.

Customer Service Manager Actions

As a customer service manager, if the adjustment amount is more than the threshold for the bill due, you can do the following tasks on the requested bill events adjustment:

Task	Description
Review Bill Adjustment Request	<p>As a customer service manager, you can either select a service request in a queue or open the service request assigned to you by another customer service representative or a manager.</p> <ol style="list-style-type: none"> 1. Go to the Service Requests section and select the adjustment request assigned. 2. You see the summary view of the bill adjustment submitted by the agent. 3. From the Bill Adjustment panel, you can click the bill number to view bill details and the billing history.
Edit Adjustment Request	<ol style="list-style-type: none"> 1. Click Edit to modify the adjustment request information. 2. On the Edit Bill Adjustment page, you can edit the adjustment amount, tax information and add any additional comments if needed. 3. Click Approve and then click Continue.
Approve Adjustment Request	Click Approve when you agree to the request created by the agent, without any changes.
Submit Adjustment Request	<ol style="list-style-type: none"> 1. After you click Continue, you see the summary view of the approved request. 2. On the Review Before Approval page, verify the information, and click Submit.
Reject Adjustment Request	Click Reject when you disagree with the request to adjust the bill charges, even for a different adjustment amount. You must enter a reason for rejecting the request.

Dispute Bills

When you dispute a bill, all the disputed data is stored in your billing system. This process doesn't require an intermediate step of creating and managing a request or manager approval. You can raise bill dispute on bill total, bill charge, and bill events.

On the Bill Details view, you can:

- Dispute the total bill amount.
- Select a bill item dispute on a charge.
- Select events dispute on a charge.

You can't select these bill items:

- Bills that have unsettled bill dispute.
- Bill total is zero.

Submit Bill Adjustments and Dispute Amounts Exclusive of Taxes

To align the processing of bill adjustments and disputes by billing systems for proper tax treatments, as the customer service agent, you can submit adjustment and dispute amounts that are exclusive of taxes.

As the agent, you can see an amount without taxes for charges that you want to adjust or dispute, set adjustment or dispute amounts that do not include taxes, and select a tax treatment. A tax treatment that includes taxes indicates that an additional amount of adjustment or dispute for taxes is added to the amount that you set as the agent. A tax treatment that excludes taxes indicates that no additional tax amount is added to the adjustment or dispute amount set by you as the agent.

In both tax included and tax excluded scenarios, you as the agent can:

- - Set adjustment or dispute amounts up to 100% of the charge amount exclusive of taxes.
 - Pass adjustment or dispute amounts without taxes to billing for processing.

6 Noncurrency Bill Adjustments

Overview of Noncurrency Bill Adjustments

Noncurrency bill adjustments are adjustments of consumed amounts of services, such as data, text messages, and so on.

These affect the balance of what customers can use in a billing period. When these services are fully utilized, these allowances may or may not be carried forward to the next billing period depending on the terms of service. These adjustments, above a specific threshold, are subject to approval by your manager. You can apply noncurrency adjustments to the balance of a noncurrency allowance.

Manage Noncurrency Bill Unit Allowance Adjustment Requests

From the Bill Unit Usage view, you can see a list of the current balances for all the usage allowances for a particular bill unit and then adjust the allowance balance.

Set Adjustment

As an agent, you can make adjustment to usage balances for billing based on your customer's requirement. To set adjustments:

1. Navigate to the Bill Usage view from the following page:
 - o **Billing Dashboard > Usage tile**
 - o **Customer 360 Dashboard > Bill Unit Balance Dues tile > Action > View Usage**
2. On the Usage page, select the appropriate resource.
3. Click **Action > Adjust Allowance Balance**.
4. On the Set Adjustment page, enter the appropriate information to set the noncurrency adjustment.
5. Click **Continue**.
6. On the Review before submit page, review the adjustment that you have set up.
7. Click **Submit**.

This sends the adjustment request to the manager for approval or directly to the billing application depending on the adjustment threshold value.

Manage Adjustment Requests

As a manager, if the agent requests an adjustment that's above the threshold, then you can view, update, accept, or reject that adjustment.

1. Open a service request for a noncurrency bill adjustment. This opens a summary view of the adjustment request submitted by the agent.

2. On the Review before Approval page, you can edit, reject, or approve the billing adjustment.
3. When you click **Edit**, you're taken to the **Edit Noncurrency Bill Adjustment** page. Here you can update the amount. Click **Continue**. Then on the Review before Approval page, click **Approve**.

After your billing application has processed the adjustment request, you can see the details of this adjustment.

7 Account Receivables

View Account Receivables List

This view lists all the Account Receivables across all accounts related to the customer.

The Account Receivables records are retrieved in real-time from the billing system when the page opens. Here you can see a list of the account receivables along with its bill dispute status and billing period. Click the relevant account receivables ID to see the details of that account receivables. If the bill has an unsettled bill dispute, then visit the bill dispute page, otherwise you can go to the bill adjustment page.

You can access Account Receivables from the following locations:

- On the panel of the Customer 360 dashboard and the Billing dashboard. The link opens a searchable list of account receivables.
- The account receivables section of the Billing Dashboard, which displays tiles of the most recent account receivables with summary information.

View Account Receivables Details for Adjustments

You can view the account receivables details for a bill adjustment completed in two ways:

1. Go to **Navigator > Service > Contact Center**.
2. From the list view of Account Receivables, click any Account Receivables ID to view, the bill adjustment details. Based on your requirement, you can click the Action ID to view the adjustment details for a total bill, bill charge, or events related to a specific bill charge.
3. Alternatively, you can go to the Billing Care Dashboard. In the Account Receivables section, click a tile to view its adjustment details.

8 Payments

View Payments History and Allocate Payments

As a customer service representative, you will address different customer issues.

You receive a call from a customer that payment is made, but there is a balance due on the account. You navigate to payment history for that specific bill unit, and then view allocated or unallocated amount details. You see that bill isn't paid completely and hence the bill is still shown as due for the customer. You help the customer understand and settle the unpaid amount. You will create a new payment and apply it to the unpaid bill amount.

View Payment History and Allocate Payment

Sign in as a customer service representative to view the payment details and set the unallocated amount to settle the bill due.

1. On the Billing Care Dashboard page, click the title of the Payment History tile for a selected Bill Unit to view the list of Payments applied to the Bill Unit. Alternatively, you can click the Payments link on the panel of the Billing dashboard and Customer 360 dashboard to open a complete list of payments across for all bill units.
2. Search the payment list to locate a specific payment.
3. Click the Payment ID link to view Payment details information, including Allocated and Unallocated Amounts.
4. To view allocated details of a specific payment ID, select Allocation Details on the Action menu of the payment record in the list view. You can also click Allocated Amount in the Payment details view.
5. From the Actions list, click **Allocate Unallocated Amount**.

When there is an Unallocated Amount on a Payment, you can allocate that amount to settle bills. To allocate an unallocated amount, you can select Allocate Unallocated Amount on the action menu of the payment record on the payment list. You can also click the Unallocated Amount on the Payment Details view.

Note: To settle or allocate a certain amount for a payment record, the unallocated amount for that specific bill unit must be more than zero.

6. On the Allocate Payment page, in Set Allocation Amount region, distribute the unallocated payment amount across one or more bills that aren't fully paid.
7. Click **Apply** to reflect the allocation changes that you made.

Capture Payments

Sign in as a customer service representative to capture the payment request from the customer and make a payment.

Customers may be calling in the Contact Center to make a payment for their service or may decide to pay a balance due after their billing inquiry is addressed. The contact center agent can access the Take Payment view from different places in the application, including:

- Bill Unit Balance Dues and Assets tiles on the Customer 360 dashboard

- Bills tiles on the Bill Dashboard
- Bill Details view
- Asset Details view

The Take Payment view displays the current balance of the Bill Unit including the unbilled usage amount and unallocated payments and credits and provides you the ability to capture a payment using the default payment method associated with the bill unit.

Integrate with Oracle Fusion Payments

You can integrate Oracle Care Experience with Oracle Fusion Payments to enable payment capture during the assisted buying checkout flow.

It will enable customers to integrate with their own payment gateways.

Oracle Fusion Payment Integration

The payment gateway is configured in Oracle Fusion Payments. The Oracle Fusion Payment page widget is made available in the assisted buying checkout flow. The credit card, debit card, and Paypal payment methods supported by the Oracle Fusion Payments are presented to the agent, who can select the relevant one on behalf of the customer. The billing address is same as the contact billing address entered by the agent, with the option to change this if the credit card address differs from the service billing address.

When the agent clicks Submit button, the payment is captured through the Oracle Fusion Payment Gateway that is configured and selected for the payment method. After the payment is processed, a payment transaction is returned and passed on to the order. If the payment fails, the agent can't submit the order but has the option to try the payment capture.

9 Contacts

Agent Assisted Contacts Management

As a contact center agent, you can respond to customer requests to update their contact and profile information. You can view and update information on the relationships between the customer and other parties. You can also view the subscription accounts associated with the contact.

Manage Addresses

The Contact Addresses section shows a list of addresses associated with the contact. An address is marked as primary and you can change the primary address to another address.

Manage Related Contacts

The related contacts section shows the party-to-party relationships. Here you can add or update relationships.

Manage Connected Accounts

Here you see a list of subscription accounts associated with the contact as the party owner of the account. You can also see the subscription accounts associated with the contact party through a manager role.

Note: Customer service representatives and customer service managers don't have privileges to create new sales organization while managing contact's related companies. The creation of sales organization is typically reserved for sales agents and tenants can add sales privileges or duty roles to service agents while configuring the application.

View and Edit Contact Profiles

As a customer service representative, you can respond to customer requests to update the contact and profile information.

To do this, you can view key contact information and navigate from the dashboard to your sales and services application to view and edit all your contact details. You can view and edit relationships between the customer and other parties. You can also view the subscription accounts associated with the contact. This information is displayed on the **Contact Details** page. You can go to the **Contact Details** page from the customer dashboards or from the landing page.

To go to the Contact Details page from the dashboard:

1. Go to the Customer 360 or the Billing dashboard.
2. Click Edit next to the caller name.

The Contact Details page opens in a new tab.

To go to the Contact Details page from the landing page:

1. Go to the landing page.
2. Drill down on the contact record.

The Contact Details page opens in a new tab.

Related Topics

10 Orders

View and Manage Orders

As call center representatives you can support customers with order inquiries in the assisted channel. Here you can view recent orders and order activity.

Order Summary on Customer 360

In the Orders section, on the Customer 360 page, you can see different tiles corresponding to different orders.

Here's what you can do:

- See count of orders for the last 30 days on the spotlight.

Note: By default, you see orders for the past 30 days on spotlight. Number of days can be configured depending on your business need.

- View summary of orders such as order type, order number, scheduling status, order status, date relevant to the status of order, errors in case the order is in Jeopardy or Failed status.
- See count of errors if the order is in Jeopardy or Failed status.
- Cancel the order unless it's in the following status: complete, canceled, pending cancellation, or failed.

Note: The name of the offer that's displayed is the name of the parent offer. For example, If a new customer places a new order for Supremo Triple-Play Promotion, then the name displayed on the order is New Supremo Triple-Play Promotion.

Order Care Dashboard

The Order Care dashboard shows recent order tiles and order activity or orders. From the spotlight, agents have the ability to view asset count, last bill, and service request.

The dashboard shows recent orders and order activity. The spotlight provides a quick glance into the most relevant information for the agent which includes last bill, account balance, and asset count.

Order Activity Stream

Here you can view order activities for the last 30 days, by default. The number of days can be configured based on your business need. As Customer service representatives you can view pending shopping carts and all types of orders. The orders can be either owner contact, billing account, or service account.

You can see the type of the order and the subscription that's purchased, modified, terminated, suspended, or resumed as part of the order. You can also search for a relevant order in the activity stream. For example, the type of orders could be new, change, suspend, resume, cancel, upgrade, and downgrade.

Order Details Header

You can cancel orders from the order details header.

As a service agent you can take appropriate action based on the scheduling status of the order. You can see the following details on the order details header:

- Order number
- Contact name
- Error notes indicating the total number of errors.

You can see errors that are associated with Failed or In Jeopardy orders. Click Add Note to add additional notes to the order.

Cancel Orders

Acting on behalf of your customer, you can cancel an in-flight order. You can cancel an order from the order summary tile or from the order details view. When canceling an order you can view and override the penalty charges.

View and Manage Customer Order History

You can see, inquire, and act on orders assigned to the person.

Here you can see all those orders where the contact is either the owner, billing account, or service account. You can search for orders based on their status or their scheduling state.

Though you can cancel orders, you won't be able to do so if the order is in one of these statuses:

- Completed
- Canceled
- Pending cancellation
- Failed

Manage Orders from Order Details Header

You can cancel orders from the order details header.

As a service agent you can take appropriate action based on the scheduling status of the order. You can see the following details on the order details header, order number, contact name, and error notes that indicates the total number of errors.

You can see errors that are associated with Failed or In Jeopardy orders. Click Add Note to add additional notes to the order.

11 Subscription Care

Agent Assisted Subscription Care

As an agent, you can suspend, resume, and cancel a subscription on behalf of a customer. Where applicable, you now have the ability to explain to the customer any early termination fees that are incurred while performing these actions.

Early Termination Rules

You can explain to your customers what they're paying early termination for. We support these early termination fees:

- Flat fee
- Flat fee with monthly subscription for the number of months into the contract.
- Monthly subscription fee for the remainder of the contract period.

For example, your customer is canceling a mobile subscription after 18 months for a 24 months subscription. You are shown the following early termination rule: \$100 + \$10 per month for the remainder of the month. You can now provide an explanation to your customer why the device payment is \$160.

Cancel Subscription

You can cancel a subscription that's active or suspended. These cancellation options are available to you:

- Immediate effect
- End of contract
- Future date

When canceling a contract you can see the total charges that are applicable for cancellation. Note that there are no early termination fees when you cancel at end of contract.

If you select a future date then the billing cycle could be effective till the end of the billing cycle or you could enter maximum future months.

Resume Subscription

You can resume active or suspended subscriptions from the assets tile or the assets details page. You can resume subscriptions immediately, next billing cycle, or a future date.

If you select a promotion, then all the bundles and service bundles within that promotion are resumed. If you select a bundle, then all services within the bundle are resumed. If you select a service or a service bundle, then only the service bundle is resumed.

Suspend Subscription

You can suspend active subscriptions from the assets tile or the assets details page. You can suspend subscriptions immediately, next billing cycle, or a future date.

12 Subscription Accounts

Overview of Subscription Accounts

Use subscription accounts to define where and how subscription services are delivered, billed, and contracted.

They're created as a person party in the consumer market and as an organization party in the business market. Subscription accounts are related to customer quotes, orders, and assets for subscription services and they're created as a part of the quoting, ordering, and provisioning processes.

Use subscription accounts to manage the customer service operations supported in Oracle Digital Experience for Communications Care. Subscription accounts is available in the Sales and also in the Service sections of the navigator. You can initiate subscription accounts from either of these locations. Here's what you can do with a subscription account:

- Create
- Edit
- Delete

Create Subscription Accounts

You can create subscription accounts under a party, either an account for an enterprise customer or a contact for a consumer. When you create a subscription account, you must select the party type, and then select the party to associate the subscription account.

Here's how you create subscription accounts:

1. Sign into Oracle CX Service using subscription account manager security role.
2. Go to **Service > Subscription Accounts**.

The Subscription Accounts list page opens.

Note: For details on creating security roles, see Set Up Subscription Accounts chapter in the Oracle Digital Experience for Communications Care Experience Getting Started guide.

With the appropriate privileges assigned to you, depending on the security privileges of your role, here you can:

- Create a subscription account.
 - Delete a subscription account.
 - Edit subscription accounts.
3. Click **Create Subscription Account**.

Create Subscription Account page opens. Specify account name, party type, party name, country, and set code details.

Note: For details on set codes, see Common Applications Configuration: Maintain Common Reference Objects chapter in the Oracle CX Sales Implementing Sales guide. If subscription accounts are used by sales and service users and you need to manage addresses in different sets for these users, you can use multiple data set. When you use multiple data sets and need some users to have access to more than one set, you must expose the SetCode field in the Subscription Accounts Profile page that those users may access, so that they can select a set to view and manage its data.

4. Select a Party Type.

To create a subscription account under an account, you must select a party type of account. To create a subscription account under a contact, you must select a party type of contact.

5. Corresponding to Party Name field, click Search.

Add Account or Add Contact window opens depending on the party type selected.

6. Search for a party name or owner name using Search and click Select. To create a new party, click Create.

7. Click OK.

Depending on the party type that you selected, the Accounts page or Contacts page opens.

8. Do one of the following:

For accounts: Click **Create Account**.

Create Account page opens.

For contacts: Click **Create Contact**.

Create Contact page opens.

9. Provide information for the required fields.

10. Click Save and Continue.

Depending on the party type, you are navigated to Edit Account: Profile page or the Edit Contact: Profile page. The account or contact party is created and is available on the Subscription Accounts list page.

11. On the Subscription Accounts list page, click Create Subscription Account.

Create Subscription Account page opens.

12. Search for the party that you created by clicking Search corresponding to Party Name field.

13. Specify a name corresponding to Name field.

14. Click Search and you can see the account or the contact party that you created.

You completed the subscription account creation process.

Delete Subscription Accounts

The Oracle Digital Experience for Communications service providers manage the lifecycle of subscription accounts through status changes and don't need to delete object records.

However, there are few scenarios where account records must be deleted. These include the requirement to delete due to company policies, customer requests, or for removal of duplicates. As an administrator, you can delete account records. For details on subscription account privileges, see Set Up Subscription Accounts chapter in the Oracle Digital Experience for Communications Care Experience Getting Started guide.

Work with Profiles

Profile for a subscription account includes the financial profile, fraud profile, and exemption profile. You can configure profiles to suit the specific requirements of your organization.

Add a Parent Account

For the subscription account profile:

- A child subscription account can have a parent subscription account as the parent.
- A child subscription account can't have another child subscription account as the parent.

You can establish a hierarchy of subscription accounts. In Profile section, corresponding to **Parent Account** field, a child subscription account can have a parent subscription account as the parent but a child can't have the parent subscription account specified as another child subscription account.

Here's how you can add a parent account:

1. Click **Search** corresponding to **Parent Account** field.
Add Parent Account window opens.
2. Identify the parent account and click **Select** on the Add Parent Account window.
You are navigated to Profile section of Subscription Accounts page.
3. Click **Save**.

Account Class

Account class is an optional attribute of the subscription account profile. You can classify subscription accounts based on the account classes. The account classes are:

- Owner class
- Service class
- Billing class
- Customer class
- Service aggregator class
- Billing aggregator class
- Null

The classification of a subscription account can help identify whether the account is for billing purposes, receiving services, or both. Subscription account classification and position in hierarchy can also help model service, billing, or contractual specifications and the privileges that customer contacts may have based on their relationships to accounts.

Financial Profile

The financial profile for a subscription account includes financial and business details such as credit rating, ownership, business identifier, and business type.

Fraud Profile

The fraud profile for a subscription account includes threshold details that can be used in fraud monitoring processes. These threshold details include maximum calls, maximum call cost and duration, international threshold, credit threshold, daily threshold, and percentage overflow.

Exemption Profile

The exemption profile for a subscription account includes exemption, permit or license details such as state seller tax permit or license number and nonprofit organization.

Work with Addresses

You must specify an address while creating a subscription account. If you want to delete the subscription account association to a primary address, you can't delete the primary address. You must first select some other address as the primary address and then delete it.

Here's how you can work with addresses for subscription accounts:

1. On the Subscription Accounts page, navigate to Addresses section.

The address that you entered on Create Subscription Accounts page is available in the Addresses section as the primary address by default.

2. If you want to identify some other address as the primary address, you can create one in Addresses section of Subscription Accounts page.

In Addresses section of Subscription Accounts page, you can see that the new address has become the primary address.

3. If you want to edit an address, in Addresses section of Subscription Accounts page, in Address column, click **Edit** corresponding to primary or nonprimary address that you want to edit.

Address window opens.

4. You can edit address and click **Save**.
5. If you want to delete any nonprimary address association to the subscription account, click **Delete**.

The nonprimary address association to the subscription account is deleted.

Work with Billing Profiles

A subscription account can have zero, single, or multiple billing profiles associated to it.

You can add, delete, or edit a billing profile. Only one billing profile can be primary. You can search and sort billing profiles based on name, address, and status. You can edit address associated with billing profile.

Here's how you can add billing profiles:

1. On the Subscription Accounts page, navigate to Billing Profiles section.
2. Click **Add**.

Billing Profile window is displayed.

3. Corresponding to Formatted Address, click **Add Address** link to add an address for the billing profile.

Address window opens.

4. Enter values for all fields.
5. Click **OK**.

On Billing Profile window, corresponding to Formatted Address, the address that you added is displayed.

6. Click **Save** on Billing Profile window.

In Billing Profiles section of Subscription Accounts page, you can see that the billing profile that you created is added.

Work with Relationships

You can associate subscription accounts with accounts or contacts using relationships. You can add a relationship for a subscription account with an account or a contact and specify the relationship type. You can also search, delete relationships, or add a comment for a relationship.

Here's how you can add a relationship and specify relationship type for a contact:

1. On Subscription Accounts page, navigate to Relationships section.
2. You can add a relationship using **Add** button and select **Contact** option.
Add Contact window opens.
3. You can either search for any existing contact using **Search** button or create a new contact using **Create** button. For details on how to create a new contact, see Create Subscription Accounts topic of this chapter.
4. Click **Select** on Add Contact window.

On Subscription Accounts page, Relationships section, you can see that the contact that you selected or created is now available in Party Name column with the party type as contact.

5. You can specify **Relationship Type** from the drop-down list such as accountant, adviser, claim specialist, and so on.

Here's how you can add a relationship and specify relationship type for an account:

1. On Subscription Accounts page, navigate to Relationships section.
2. You can add a relationship using **Add** button and select **Account** option.
Add Account window opens.
3. You can either search for any existing account using **Search** button or create a new account using **Create** button.

For details on how to create a new account, see Create Subscription Accounts topic of this chapter.

4. You can enter an account name and click **Search**.

The unique party name is displayed.

5. Click **Select** on Add Account window.

On Subscription Accounts page, Relationships section, you can see that the account that you selected or created is now available in Party Name column with the party type as account.

6. You can specify **Relationship Type** from the drop-down list such as contract administration office, local procurement office, regional headquarter, and so on.

Work with Attachments and Notes

You can use attachments and notes for a subscription account to include additional information. You can view or manage attachments and notes for subscription accounts.

Attachments

Here's what you can do with attachments:

- As a subscription accounts administrator or manager, you can add or remove an attachment or a link for a subscription account.
- As a subscription accounts viewer, you can only view, open, and save an attachment. You can also open and view the link.

Notes

Here's what you can do with notes:

- As a subscription accounts administrator or manager, you can create, view, filter, and remove notes attached to an account.
- As a subscription accounts viewer, you can only view notes attached to an account and also filter it based on the note type such as reference, special, default, and general.

Subscription accounts administrator or subscription accounts manager can also create and indicate a note as private. Notes indicated as private are available only to the author of the note.

Work with Subscription Account Management Roles

As a customer service representative with the Subscription Account Manager duty role, you can view, create, and edit account management roles on behalf of your customer.

Go to the Roles page, in Subscription Accounts, and do the following:

- See a list of roles between the subscription account and the customer.
- Search for names.
- Sort by roles and names.
- Add roles.

Create a contact and then associate it with the subscription account through the relationship.

As a customer service representative with the Subscription Account Administrator role, you can clean data and fix issues related to subscription accounts, including viewing, creating, editing, and deleting account management roles.

13 Oracle Digital Assistant

Overview of Oracle Digital Assistant

Your application is prebuilt with Oracle Digital Assistant.

Digital assistants are virtual devices that help you accomplish tasks through natural language conversations, without having to seek out and wade through various apps and websites. As an agent you can interact with the customer through the chat interface of the digital assistant. When you engage with the digital assistant, the digital assistant evaluates customer's inputs and routes conversation to and from the appropriate skills.

Before You Start

Here are some things to note before you start using the digital assistant:

- **Supported channels:** Web channel, Facebook messenger
- **Supported language:** English

You request information by entering questions or sending commands and the digital assistant retrieves the information or acts on your requests. Here are some sample phrases you can use:

- Hi
- Hello
- Hey
- Get started
- Start
- What can you do for me?
- What can you do?
- What can I do?

Order Care Skill

The Order Care skill enables customers to search for and view information about their orders.

Customers can interact through common messaging platforms or web channels to resolve any inquiries they may have about their order history and status, as well as being able to view line item status. The customer is prompted with typical phrases or questions that can be asked, as well as use natural language to interact with the digital assistant.

What this skill does?

Here are the main features for all the supported channels:

Feature	Sample phrases you can use
View orders	<ul style="list-style-type: none">• Show me my orders• What orders do I have
View orders from a time frame	<ul style="list-style-type: none">• What is my order history• Show me my orders for the last 6 months• Show me my orders from last month
View order status	<ul style="list-style-type: none">• What are my in-progress orders• Show me my completed orders from last month• What is the status of my last order• Which order am I waiting for
View order summary	<ul style="list-style-type: none">• Show me my last order• I need information about my order from last month• Show me the summary of order #12345678
View order details	<ul style="list-style-type: none">• What are the details of my last order• Show me the items on my last order• Show me the details of order #12345678

14 Agent Assisted Buying

Overview of Agent Assisted Buying

As the call center agent, you can search, select, configure, and checkout offers on behalf of customers.

Agent assisted buying guides you through the process of finding the right offer for the customer, configuring that offer or offers based on the rules defined, and then capturing relevant information as part of the checkout processes before submitting the order for fulfillment.

Agent assisted buying enables users to:

- View, Search, and Compare Offers from the Catalog
- Configure Product Offers
- Checkout and Submit Order

View, Search, and Compare Offers from the Catalog

You can browse, search and filter the offers catalog to find relevant offers as part of an assisted buying journey. Here's what you can do:

- Use the Customer Interview page to prefilter the offers catalog based on customer requirements.
- Perform free form and filtered searching of offers catalog to find relevant offers for customers.
- Compare offers, view features, and pricing side by side.
- View offer details.

It enables you as an agent to identify offers that are the most relevant to the customer needs for increased sales and post sales customer satisfaction. Here's the process flow for the offers catalog:

1. You receive a call from the customer interested in purchasing an offer.
2. Inbound call screen pop directs you to the Sales Catalog page.
3. Alternately, open Sales Catalog page from Contact Search page by selecting from the Action menu.
4. Search through the sales catalog, which is prefiltered based on the customer information.
For example, if the customer segment is consumer, residential catalog is displayed.
5. Use filter chips and search bar to locate offers the customer is interested in.
6. Display offers in tile or list format to find and communicate information to the customer.
7. Select different filter chips to easily search using predefined filters.
8. Get more details of a particular offer by viewing the summary information on the tile and also by drilling down the tile to display the Offer Details page.
9. View the features summary, marketing features details, offer details, product guide, and similar offers.
10. Click the Arrow icon next to offer name to return to Offers Catalog.
As an agent, you can compare different offers and inform the customer about benefits, features, and pricing that is most suitable for their needs.
11. Select **Compare** check box for comparing offers on the Offers Catalog page.

12. Click **Add to Compare** to view offer comparisons on the Offer Comparison page.
13. Click the Arrow icon next to Offer Comparison to return to Offers Catalog.

Customer likes an offer after hearing about the details and how it compares to the other options. You as an agent, can add it to the cart to proceed with the configuration of the offer. You can continue shopping on behalf of the customer if additional products and services are required.

14. Click **Add to Cart** on the offer tile.

Message is displayed showing that the offer is added to the cart and View Cart button is displayed.

Note: If the offer that is added to the cart is a mobile plan that supports multiple mobile lines then a dialog box is displayed where you can specify the number of mobile lines to be added to the mobile plan of the customer.

15. Click **View Cart** button.

Manage Price Lists, Catalogs, and Customer Types

Here's how you can manage price lists, catalogs, and customer types.

Price Lists

As a tenant administrator, you can define a default currency price list for each customer type. Customer types are residential, business, small and mid-sized business (SMB), and multi dwelling unit (MDU).

As an agent, you can select price list on the Customer Inquiry page while starting the assisted buying journey. You are presented with a default price list based on the customer type. You can identify the customer type from the token in the incoming call. If no customer type is identified, then the default value will be the tenant-defined business configuration value. For existing customers, the customer type is identified from the profile value of the customer.

Catalogs

On the Offers Catalog page, as an agent, you can view different catalogs for a particular customer type. The default catalog is the first one in the search result. You can change to any available catalog. You can search for product offers within a specified catalog. You can also search for product offers for a customer type across all catalogs that are defined for that customer type.

Customer Types

On the Offers Catalog page, as an agent, you can select a different customer type. You can view catalogs that are relevant to the selected customer type with the default price list defined by the tenant for the customer type. You are presented with the filtered set of catalogs based on the customer type and price list.

Configure Product Offers

As an agent, you can configure offers based on the customer requirements after you add them to the shopping cart and before proceeding to the checkout flow. Here's what you can do:

- Use guided configuration for mobile and TV services.
- Select and configure plans, devices, packages, and add-ons.
- View shopping cart pricing and reconfiguration options.

It provides a streamlined and efficient process for customer service agents to configure product offers based on the customer requirements. Here's the process flow to configure product offers:

Configure Mobile Line, Select Mobile Plan, and Device, and Add-Ons

Here are the steps:

1. Assign a nickname for the mobile line to make it meaningful for the customer on the Cart page.
By default, the line name is Mobile Line 1. You can edit it based on customer's inputs.
2. Select the required mobile plan. If the customer decides to change to a different mobile plan, you can select a different mobile plan. In case additional plans are available then **Browse all plans** option is available.
3. Select whether customer wants to port in their existing number or get a new number auto assigned.
4. Select and configure one of the devices displayed in the tiles, select color and capacity, and then **Add to Cart** or select **Browse all Devices** to show additional options which the customer can select from.
5. Use the filter chips of search box to find device based on the brand that customer is interested in and then select **Choose Device**.
6. Select the add-on and note that it is presented as a selected option which can be removed if required.
7. The components of the bundled offer show whether they are configured and provide summary information about the nickname, plan, and device.
8. Click **Save and Continue**.
As an agent, you're notified that the cart is updated.
9. Click rows to expand and collapse, and you can reconfigure at any time.
10. Click **Add to Cart**.
11. Change quantity and remove items if required.
12. Click **Save and Continue**.
As an agent, you can at any time provide a summary of what the customer has in the shopping cart along with prices.
13. View the **Cart Summary**.
14. View the One Time, Recurring, and Discount options available based on the current configuration.
As an agent, you can modify or reconfigure items in the cart by selecting the action items. These are dependent on the item context and provide a simple navigation for making relevant changes based on customer needs.
15. If the customer is interested in adding an additional line to their mobile plan, click **ellipses** corresponding to the item.
Relevant action items to update the configuration, change the plan, and remove from cart are displayed.
16. Click **ellipses** for the Mobile section and select **Add Mobile Line**.
17. Select **Add Mobile Line** based on customer needs and configure the new line.
18. Click the new mobile line that appears in the cart.
19. Configure options for new line and new device.
By default, the previous mobile plan is selected. If required the agent can select a different mobile plan based on the customer inputs.
20. Click **Save and Continue**.

The plan is shown as configured. As an agent, you can view updated cart and cart summary with pricing.

21. Continue shopping and select new offers from the catalog.
22. Add, remove, or reconfigure options from the cart and empty the cart completely, and start over if required.
23. View cart summary.

Configure TV Plan (Optional)

Here's how you can configure TV plan:

1. If the customer is interested in a different TV plan select a different TV plan displayed on the tiles, or select one from the **Browse All Plans** catalog.
2. If the plan allows additional TV extensions then increase the extension quantity based on the customer's interest.
3. Select additional TV package add-ons that can be added as part of the selected TV plan.
4. Click **Save and Continue**.

The TV plan is indicated as configured. The cart summary reflects all the configuration updates.

Add Accessories (Optional)

Here's how you can add accessories:

1. As an agent you're presented with optional accessories which can be added in any quantity.
The recommended accessories are displayed based on the device selected in the mobile plan.
2. **Other Accessories** can be selected from the **Browse all Accessories** catalog.

The cart summary is updated with the accessories selected.

Checkout and Submit Order

As an agent, you can proceed through the checkout flow and submit the order for fulfillment. Here's what you can do:

- Capture billing and shipping details.
- Capture payment through integration with payment gateway.
- Accept commitment terms.
- Submit order for fulfillment.

You can continue with the checkout flow after the customer agrees with the options selected and the pricing. Here's the checkout flow:

1. Click **Checkout** on the Cart page.
On the Checkout page, details such as contact information and shipping options are available.
2. Use **Verify Address** button for address validation.
3. Select a **Shipping Carrier** and a **Shipping Method** supported by the carrier.
4. Review Terms and Conditions section and indicate customer agreement.
5. Click **Update Cart** to go back to the cart view if required. Make updates and return to the Checkout page.

6. **Payment Options** is the next step where you will make the payment.

Note: After payments are made, you can't update the cart.

7. On the Checkout page, click **Create Order**.

You are notified that the order is created along with the order ID for future reference. You can share this information with the customer.

In-Store Pickup

The in-store pickup capability allows the agent to select eligible product items for in store-pickup. During checkout, agents can select in-store pickup for eligible products. If there are any items in the shopping cart with the Smart Phone category, the agent is presented with an option for the customer to pick up those items from a store.

The agent can search for stores which have the items in stock based on postal or ZIP code and distance range, which are then displayed on a map to show the locations and also in the drop-down list. In-store pickup utilizes Oracle Maps to view store locations based on stock availability.

The agent can select the most convenient store for the customer from the map or the drop-down list and see additional details such as the address of the store. After the store is selected, the agent can continue with the checkout process.

Integrated Process Flow with Oracle Retail Order Broker

If there are multiple eligible items in the shopping cart then In Stock status would mean that all the eligible items are available in a retail store. In case of partial availability, the ship to address option is available.

- Tenant must configure the Oracle Retail Order Broker system endpoint. The solution supports authorization between Oracle Care Experience Contact Center and Oracle Retail Order Broker.
- Tenant must configure the search mile range and unit (km or miles) for buy online pick in-store flow and specify a minimum and maximum range.
- Integrate with Oracle Retail Store Inventory Management for availability check and to pick in-store.
- Agent can use store pickup option for the delivery of the device if there are eligible items in the cart and the integration is enabled.
- Agent can use the option to search for nearby stores using ZIP code and mile range after selecting the store pickup option.
- Agent can use mile range search options such as 5, 10, 15, 20, 25, and pick any of the supported range searches.
- Agent can view the list of retail stores that match the search criteria and have the available stock for the eligible items. Oracle Care Experience retrieves information from Oracle Retail Order Broker application.
- Agent can view the map of retail stores that are within a range of the specified ZIP code.
- Agent can zoom in or zoom out on the map to view the surrounding streets and locations for the retail stores.
- Agent can change the search criteria by entering a different ZIP code. This will refresh the list of retail stores and the retail store map.
- Agent can pick a store from the search results.
- Agent can change the retail store selection either before or after the store pick-up confirmation.
- Agent can select in-store pickup for eligible items in the shopping cart. During the checkout flow, if there are items in the cart that are eligible, the agent is presented with an option for the customer to pick up those items from a store. The agent can search for stores, which have the items in stock and select the required store on behalf of the customer.

- **Note:** For details on configuring Oracle Retail Order Broker, see chapter 13 Manage Tenant Configuration of the Implementing Care guide.