CX for Industries

Using Financial Services

April 2023

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Using Financial Services

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1 About This Guide

Audience and Scope

This guide provides information on how retail bankers, commercial bankers, and bank managers can use the Financial Services industry solution and perform routine tasks specific to the financial services industry.

Related Guides

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

Title	Description
Oracle CX for Industries Getting Started with Financial Services Implementation	Contains information that helps you to perform routine business tasks specific to the financial services industry.
Oracle CX Sales Using Sales	Describes user tasks to help sales managers, salespeople, and other sales end users perform day-to-day business tasks.
Oracle Applications Cloud Using Common Features	Contains information that helps you to perform day-to-day activities using Oracle Applications Cloud.
Oracle CX Sales Creating and Administering Analytics	Provides administrators with instructions on creating, editing, and embedding analytics in Oracle CX Sales and Oracle B2B Service.

Related Topics

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2 Overview

Overview of Financial Services

Oracle CX for Financial Services enables financial institutions to modernize their branches and take the customer experience digital.

With a single 360 degree view of customer information and interactions, banks can build a personalized relationship with each customer and offer financial products and services that best suit a customer's unique needs. Banks can automate the process of identifying, nurturing, and creating referrals to cross-sell products across any channel, including social, mobile, and web.

With Needs Analysis banks can also provide guided selling and self-service personalized product recommendations, in addition to streamlining the customer onboarding and account origination processes.

Business Scenario

The business processes in the financial services scenario can be summarized as follows:

- Oracle CX Marketing offers social campaigns and analyzes customer activities to generate leads. These leads are assigned to bankers.

- These leads enable bankers to engage with potential buyers or prospects and based on the insight that Oracle CX Sales provides, which includes financial profile and financial accounts, convert a lead to opportunity.

- Needs Analysis in Oracle CX Sales enables bankers to find the best suited financial product for customer based on customer needs and bank policies. Needs Analysis updates an opportunity and supports account origination process.

- Customer 360 provides a complete view of customer financial information, including financial profile, financial accounts summary and detail, and financial accounts analytics. Financial accounts analytics include financial accounts snapshot and monthly average balance reports.

- Service request and knowledge management to enrich customer experience.

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This figure illustrates the business processes in Oracle CX for Financial Services.
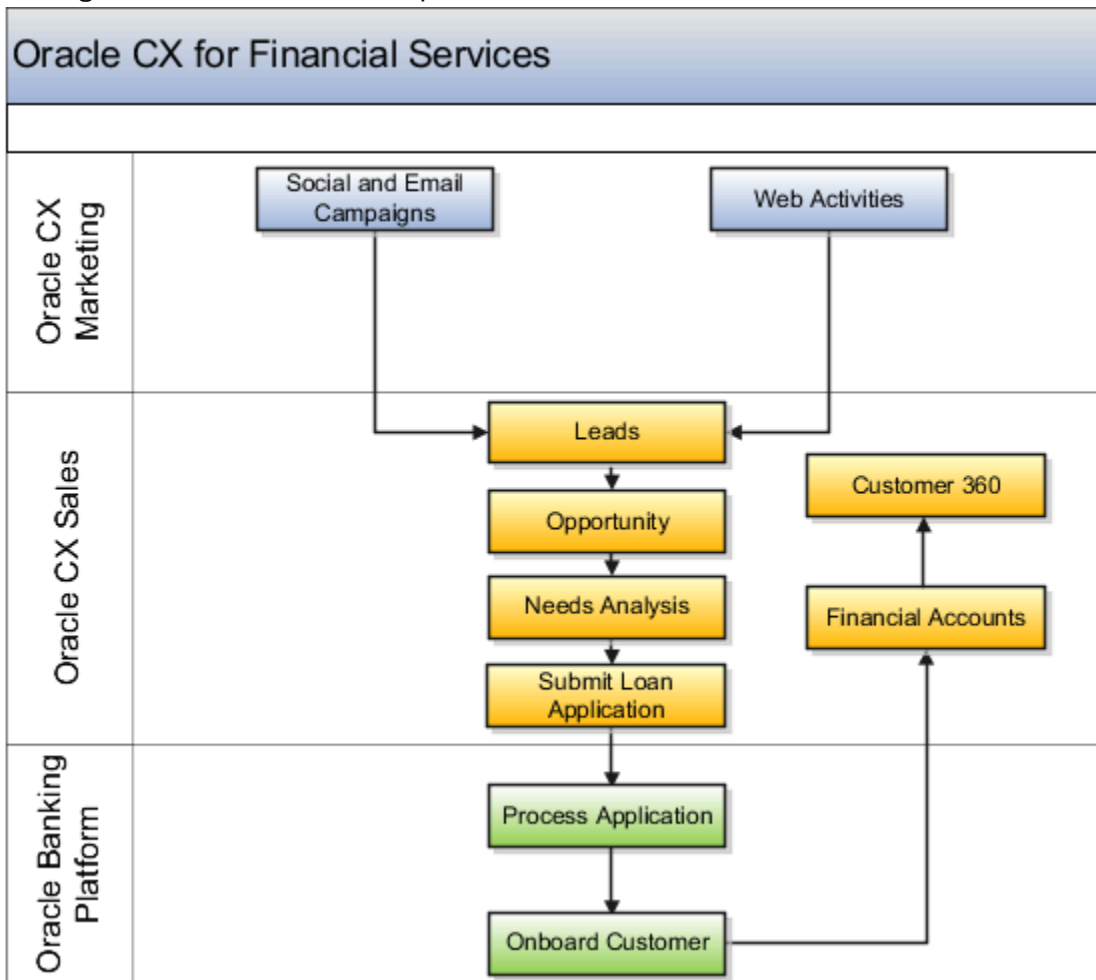
You can stay up-to-date on the status through dashboard and analytics that provide a snapshot of key performance indicators during the financial services cycle.

You can use the functionality of Oracle CX Marketing and Oracle CX Sales to work with the standard functionality and concepts such as Appointment, Account, Contact, Household, Lead, Opportunity, and Service Request to understand and engage with your customer, and to do what you want to do: sell more and retain customers.

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3 Customer 360

Overview

The Customer 360 chapter covers how you can work with:

- Financial Profiles
- Financial Accounts and Transactions
- Analytics

Understand Customer 360

Customer 360 provides a complete view of customer information including open opportunities, open leads, financial profile, financial accounts, financial transactions, financial accounts analytics, product recommendations based on browsing history, digital activities from marketing such as number of open mails, form submissions, and Website visits.

Customer 360 provides insights about current and prospective customers. Customers include individual contacts and households for retail banking. Customers include companies (organizations) for commercial banking. Customer 360 includes information about customers such as contact details, financial account details, financial profiles, open leads, open opportunities, email, phone, and service requests information. It acts as the single source of complete customer information.

Financial Profiles of Companies and Contacts

Financial Profile is available for contacts and companies. Financial profile provides visibility into the customer financial standing and purchasing power with details such as income, net worth, open leads, cash flow, and credit balance to understand product eligibility and target campaigns.

Edit Contact: Profile page contains information about the contact profile. Financial Profile section of the Edit Contact: Profile page includes information on the taxpayer identification number (TIN), customer classification, age, desired retirement age, years to retirement, credit rating, employment status, number of dependents, type of residence, tax bracket, tax status, currency, annual income, and annual expenses. Investment section of the Edit Contact page includes information on investment horizon, investment experience, investment strategy, and risk tolerance.

Edit Account: Profile page contains information about the company profile. Financial Profile section of the Edit Account: Profile page includes information on the taxpayer identification number, customer classification, risk profile, relationship profitability, currency, and annual revenue.

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Review Financial Profiles of Companies and Contacts

As a banker, you need to review and analyze financial profiles of companies and contacts before providing loan opportunities.

To review financial profile of a company:

1. Sign in to Oracle CX Sales as a Commercial Banker.
2. Click **Sales** on the Oracle CX Sales landing page.
3. Click **Companies**.

   Accounts page opens.
4. Click any specific account name.

   Edit Account: Overview page opens.
5. Click **Profile** subtab.

   Edit Account: Profile page opens.
6. Review information corresponding to fields in the **Financial Profile** section such as taxpayer identification number, customer classification, risk profile, relationship profitability, and annual revenue.
7. Click **Save and Close**.

To review financial profile of a contact:

1. Sign in to Oracle CX Sales as a Retail Banker.
2. Click **Sales** on the Oracle CX Sales landing page.
3. Click **Contacts**.

   Contacts page opens.
4. Click any specific contact name.

   Edit Contact: Overview page opens.
5. Click **Profile** subtab.

   Edit Contact: Profile page opens.
6. Review information corresponding to fields in the **Financial Profile** section such as taxpayer identification number (TIN), customer classification, age, desired retirement age, years to retirement, credit ranking, employment status, number of dependents, type of residence, tax bracket, tax status, annual income, and annual expenses.
7. Review information corresponding to fields in the **Investment** section such as investment horizon, investment experience, investment strategy, and risk tolerance.

   Note: Taxpayer Identification Number (TIN) is personally identifiable information (PII). You can't view or edit this information. A sales administrator can edit this information. PII such as social security number, home address, bank account numbers, and home phone numbers are protected to prevent unauthorized use. Although PII attributes are available in Contact create and edit pages and in the list search for those job roles that were given explicit access, PII attributes aren't searchable or displayed in global search. To make PII attributes available to any job role other than sales administrator, you must modify those job roles in the Security Console to include PII data security privileges.

8. Click **Save and Close**.

Financial Accounts and Transactions

A contact, household, or company owns financial accounts. Company or contacts deal with transactions and holders. Financial account details includes information about financial accounts of contact or company such as the financial account, type of the financial account, balance, balance as of date, date

Following are the key concepts for understanding financial accounts and transactions:

1. Financial Accounts Overview

   Financial accounts overview provides financial accounts summary, transactions details, and information about holders for household accounts such as the joint checking account.

2. Contact Financial Accounts

   Contact financial accounts is the list of all financial accounts that an individual contact for retail banking owns.

3. Household Financial Accounts

   Household financial accounts is the list of all financial accounts that members of the household own.

4. Company Financial Accounts

   Company financial accounts is the list of all financial accounts that the company for commercial banking owns.

5. Financial Account Summary

   Financial account summary is the complete view of customer financial account that includes information such as type of account (individual or joint), account balance, and date on which the account was opened. Financial accounts summary enables bankers and bank managers to view the list of household or contact financial accounts and to drill down for further details. Financial accounts summary is available on the Edit Contact, Edit Household, and Edit Company pages.

6. Transactions

   Transaction details include details related to all the transactions for the financial account such as transaction number, transaction date, description, type of transaction (deposit), and status of transaction as completed or not.

7. Holders

   Holders contains the list of financial account holders and their email details.

Storage of Financial Account Transactions

To enhance performance, a system administrator can provide the number of days for which financial transactions must be maintained and limit storage of historical financial transactions data of financial accounts. The number of days indicates that all the financial transactions between the current day

Following is the process flow:

1. Sign into Oracle CX Sales as a System Administrator.
2. From Navigator, in Tools, click **Scheduled Processes**.

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Scheduled Processes page opens.
3. Click **Schedule New Process**.
Schedule New Process dialog box opens.
4. Select **Type** as **Job** radio button.
Schedule New Process dialog box opens.
5. In the drop-down list, corresponding to **Name**, click **Search**.
6. Enter **Name** as **Delete Financial Transactions**.
Search and Select: Name dialog box opens.
7. In **Search**, for **Name**, enter **Delete Financial Transactions**.
8. Click **Search**.
9. Select **Delete Financial Transactions**.
10. Click **OK**.
Schedule New Process dialog box opens. **Name** is displayed as **Delete Financial Transactions**.
11. Click **OK**.
Process Details window opens.

> **Note:** For the **Number of Days to Retain** field, 90 days is the default value. You can change this value and specify any number of days to retain.

12. Click **Advanced**.
13. In the Advanced tab, click **Schedule** to run the deletion task periodically.
14. Corresponding to **Run**, **As soon as possible** and **Using a schedule** options are available. Select any one option.
15. Click **Submit**.
Confirmation dialog box appears.
On the Scheduled Processes Overview page, you can see that your job is submitted and status is **Succeeded**.
16. Navigate to Financial Account Transaction page.
17. Click **Transactions** tab.
You can see that the financial account transactions within the past 90 days are retained.

> **Note:** Deleted data is no longer available and can't be retrieved.

Analytics

Analytics are user-defined reporting metrics for executive-level insights, increased number of prebuilt reports, infolets, and enhanced error handling.

Analytics display the top five financial products based on open leads and opportunities that enables retail bankers, retail bank mangers, commercial bankers, and commercial bank managers to know their top winning products.

The three reports that are available from both Edit Household, Edit Contact, and Edit Company pages are Financial Account Snapshot Report, 12 Month Average Monthly Balance Report for Cash Accounts, and 12 Month Average Monthly Balance Report for Credit Accounts.

Financial Account Snapshot Report enables banker to get a quick summary of customer's existing financial accounts and current balance. Each bar represents a financial account and its current balance. If an account is marked for any reason such as stolen credit card or overdraft checks, its corresponding bar is highlighted in a different color. Information about dates when balances were reviewed and dates when financial accounts were opened is also available.

In case of retail banking, financial account is associated with a contact or a household. In case of commercial banking, financial account is associated with a company. Various types of financial account statuses are alert, normal, inactive, and closed. Your financial account status can become alert if you're a defaulter or if you're irregular with installment payments. Financial account status can become paid out or get closed if you paid your loan amount. Financial account status can become inactive if your account is blocked for any reason.

12 Month Average Monthly Balance Report for Cash Accounts enables the banker to view monthly cash flow of the customer for the last twelve months including the current month. Balance amounts information based on the product and month is available. 12 Month Average Monthly Balance Report for Credit Accounts enables the banker to view credit balance of the customer for assessing the purchasing power, indicating how much money customers are borrowing for the last twelve months including the current month. Balance amounts information based on the product and month is available.

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4 Needs Analysis Interviews

Needs Analysis Interviews for Leads and Opportunities in Retail Banking

Needs analysis is based on Intelligent Advisor and enables bankers to rapidly conduct dynamic interviews based on customer's needs and interests.

Following are the objectives of needs analysis:

1. Recommend financial products based on customer needs and circumstances.
2. Ensure that recommendations comply with corporate and regulatory policies.
3. Generate loan application letters based on Intelligent Advisor templates.

Improved loan process through interview-based needs analysis helps banks to ask relevant questions such as credit score and value of house that customers (individual contacts or households) are looking to purchase. Needs analysis provides personalized recommendations to customers that helps in retaining existing customers and gaining new customers quickly. As a retail banker or a retail bank manager, you can create new interviews for account, contact, household, partner, lead, opportunity, and activities. You can modify ready-to-use lead and opportunity needs analysis interviews. Dynamic interview-based needs analysis delivers consistent and compliant banking services to customers.

Using Needs analysis, as a retail banker or a retail bank manager, you can navigate from Opportunity Detail page or Lead Detail page to Intelligent Advisor Needs Analysis page and back to Opportunity Detail page or Lead Detail page. You can navigate from the Edit Opportunity page or the Edit Lead page to Intelligent Advisor Needs Analysis page to enable immediate display of updates from the Intelligent Advisor. After needs analysis is performed, lead or opportunity is updated with a product or products selected during the interview in addition to the attachment that contains interview questions and answers being made available.

Oracle Policy Modeler is the Intelligent Advisor tool for creating new interviews for configuring Intelligent Advisor interviews. You can create new interviews in Oracle Policy Modeler for company, contact, household, partner, lead, opportunity, and activities. You can also modify the ready-to-use opportunity needs analysis interviews using Oracle Policy Modeler.

> **Note:** Intelligent Advisor provides the ability to define templates for PDF attachments.

Needs analysis comprises of the following four steps:

- Enter Loan Information
- Enter Assets and Income
- Select Loan
- View Payment Information
- Confirmation

Step-wise process for performing needs analysis for opportunities:

1. Click **Opportunities** on springboard and then click **Create Opportunity** to specify details about the opportunity including the opportunity type, whether home purchase, home refinance, or home equity. After you save the application, you can find the opportunity in the Name column on the list page of opportunities.

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2. Click the opportunity that you created and open the Edit Opportunity: Summary page.
3. Click **Needs Analysis** link to enter loan information details.
4. Click **Next** to specify income and assets details.
5. Click **Next** to select an appropriate loan, view payment information, and then click **Submit** on the confirmation window.

The Edit Opportunity page lists products that are selected in the interview based on the needs analysis for the opportunity that you specified.

Step-wise process for performing needs analysis for leads:

1. Click **Leads** on springboard and then click **Create Lead** to specify details about the lead including the lead type, whether home purchase, home refinance, or home equity. After you save the application, you can find the lead in the Name column on the list page of leads.
2. Click the lead that you created and open the Edit Lead: Summary page.
3. Click **Needs Analysis** link to enter loan information details.
4. Click **Next** to specify income and assets details.
5. Click **Next** to select an appropriate loan, view payment information, and then click **Submit** on the Confirmation window.

The Edit Lead page lists products and attachments generated based on the needs analysis for the lead type that you specified.

There are three types of loans:

- Home Purchase
- Home Refinance
- Home Equity

Following information is required for home purchase type of loan:

- Loan purpose (home purchase)
- Home price
- Down payment percent
- Down payment value
- Loan amount
- Interest type (fixed or variable)
- Credit score

Following information is required for home refinance type of loan:

- Loan purpose (home refinance)
- Home price
- Mortgage balance
- Interest type (fixed or variable)
- Credit score

Following information is required for home equity type of loan:

- Loan purpose (home equity)
- Home value

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- Mortgage balance

- Loan amount

- Interest type (fixed or variable)

- Credit score

Needs Analysis Interviews for Contacts and Households in Retail Banking

Needs Analysis interviews are available for leads and opportunities in retail banking. Needs Analysis interviews are also available for households and contacts. Retail banker or retail bank manager can run needs analysis from Household and Contact overview pages and create a lead or an

Following are the process flows for running Needs Analysis from Contact and Household pages:

Contact

Process flow for running Needs Analysis from Contact page:

1. Click **Needs Analysis** link available on the Edit Contact: Overview page.

   You're navigated to the **Loan Information** train stop of the Intelligent Advisor interview.

2. On the **Loan Information** train stop, you select the loan purpose. Options available are home equity, home purchase, and home refinance.

   > **Note:** The Needs Analysis interview questions change based on the type of loan purpose that you select.

3. On the **Loan Information** train stop, when you select the **Loan Purpose** such as **Home Purchase**, enter the **Home Price** amount and the **Down Payment** percentage.

   Loan Amount value is populated automatically based on the home price amount and the down payment percentage.

4. Select an **Interest Type**. Interest type options are fixed, variable, or fixed or variable.

5. Primary contact is available and displayed as the default borrower name. Select the appropriate **Credit Score** such as excellent, good, or average.

6. Click **Next**.

   You're navigated to the **Income** train stop.

7. Add income sources and click **Next**.

   You're navigated to the **Assets** train stop.

8. Add all assets and click **Next**.

   You're navigated to the **Select Loan** train stop. A list of recommended products are displayed based on information entered in the previous train stops.

9. Select **More information** to view product details, including additional fees.

10. Select at least one product.

11. Click **Next**.

12. View **Loan Payment** train stop and enter extra monthly and yearly loan payment to view the impact on interest versus the principal payment.

13. Click **Next**.

    You're navigated to the **Confirmation** train stop. The product that you selected is displayed. You have the option to create an opportunity or a lead based on customer readiness to buy. The name of the opportunity or the lead must be unique.

14. Click **Submit**.

    You're navigated to Edit Contact: Overview page and you can see the lead or the opportunity that you created in Leads or Opportunities infolet.

15. Click **Leads** or **Opportunities** infolet to navigate to Edit Contact: Leads or Edit Contact: Opportunities page.

16. Click the **Lead** or **Opportunity** that you created.

    On the Edit Lead: Summary or the Edit Opportunity: Summary page, the product you selected in Needs Analysis is added as a revenue line item to the lead or opportunity.

17. On the Edit Contact: Leads or the Edit Contact: Opportunities page, click **Profile** subtab.

    Edit Contact: Profile page opens.

18. Click the attachment name to view the loan application.

Household

Process flow for running Needs Analysis from Household page:

1. Click **Needs Analysis** link available on the Edit Household: Overview page.

    You're navigated to the **Loan Information** train stop of the Intelligent Advisor interview.

2. On the **Loan Information** train stop, you select the loan purpose. Options available are home equity, home purchase, and home refinance.

    > **Note:** The Needs Analysis interview questions change based on the type of loan purpose that you select.

    Primary contact is available and displayed as the default borrower name. On the co-borrower name drop-down list, relationships such as spouse and parents in the household are listed. You can select any member of the household as co-borrower. The Present Address is automatically updated based on the household member selected as the co-borrower. Number of dependents, marital status, and date of birth information is automatically populated.

3. On the **Loan Information** train stop, when you select the **Loan Purpose** such as **Home Purchase**, enter the **Home Price** amount and **Down Payment** percentage.

    Loan Amount value is populated automatically based on the home price amount and down payment percentage.

4. Select an **Interest Type**. Interest type options are fixed, variable, or fixed or variable.

5. Select the appropriate **Credit Score** such as excellent, good, or average from the drop-down list for the borrower.

6. Click **Next**.

    You're navigated to the **Income** train stop.

7. Add income sources and click **Next**.

    You're navigated to the **Assets** train stop.

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8. Add all assets and click **Next**.

   You're navigated to the **Select Loan** train stop. A list of recommended products are displayed based on information entered in the previous train stops.
9. Select **More information** to view product details, including additional fees.
10. Select at least one product.
11. Click **Next**.

    View **Loan Payment** train stop and enter extra monthly and yearly loan payment to view the impact on interest versus the principal payment.
12. Click **Next**.

    You're navigated to the **Confirmation** train stop.

    The product that you selected is displayed. You have the option to create a lead or an opportunity based on customer readiness to buy. The name of the opportunity or the lead must be unique.
13. Click **Submit**.

    You're navigated to Edit Household: Overview page and you can see the lead or opportunity that you created in Leads or Opportunities infolet.
14. Click **Leads** or **Opportunities** infolet to navigate to Edit Household: Leads or Edit Household: Opportunities page.
15. Click the **Lead** or **Opportunity** that you created.

    On the Edit Lead: Summary or the Edit Opportunity: Summary page, the product you selected in Needs Analysis is added as a revenue line item to the opportunity or lead.
16. On the Edit Household: Leads or the Edit Household: Opportunities page, click **Profile** subtab.

    Edit Household: Profile page opens.
17. Click the attachment name to view the loan application.

Modify Intelligent Advisor Interviews to Meet Organization-Specific Needs

You must load needs analysis interviews to Oracle Policy Modeler for modifying the needs analysis interviews to suit the needs of your organization. Open the Needs Analysis project (.xprj) in Oracle Policy Modeling and use Oracle Policy Modeling to modify the interview. For an

Add New Fields (Attributes)

To load or save new fields, known as Attributes in Oracle Policy Modeling, to or from Oracle CX Sales, you must map these new fields into your Needs Analysis project.

Following are the steps:

1. Go to the Oracle Policy Modeling Data tab.
2. Click **Input Mapping** view (to load data) or **Output Mapping** view (to save data).
3. In the pane, select the entity, for example, opportunity, for which you want to add a field.

4. Select the fields that you want to save or load.

For more information, see the section on binding attributes to web service data source fields in mapping data to a web service connection of the Data mapping in the Policy Modeling User guide listed in Related Topics section in this topic.

Add New Objects

Following are the steps to add new objects in an existing needs analysis interview:

1. Open the needs analysis interview in Oracle Policy Modeling.
2. Go to the Oracle Policy Modeling Data tab.
3. Click **New Entity**.

   An entity is created with the default name **the new entity**.
4. You can rename it.
5. Click the entity.

   The Edit Entity dialog box opens.
6. In the **Mapping** section, select any supported child object corresponding to **Mapped to**.
7. Click **OK**.

   In the pane, you can see that the supported child object is mapped to the entity.

   > **Note:** You must create attributes for all the required fields in the child object.

   Error message is displayed for the field without mapped out attributes for required fields.
8. Click the error message.

   Field and Attribute details are displayed.
9. Click **Data**.
10. Click the entity with mapped child object.
11. Click **New Attribute**.

    New Attribute dialog box opens.
12. Specify a name.
13. Specify **Attribute** value.
14. Select **Mapped in** value.

    Mapped in field loads data from Oracle CX Sales.
15. Select **Mapped out** value.

    Mapped out field updates data to Oracle CX Sales.
16. Click **OK**.

    The New Attribute dialog box closes.

Supported Fields and Objects

You can add any of the supported fields as a new field. After attributes are mapped based on the supported fields and objects table, attributes can be displayed on Interview screens or can be used in rules to control decisions made in the interview. Note that the connector inserts all product records for which the attribute **IsSelected** is **True** with Revenue Lines or Product Lines for Opportunity and Lead Parent object respectively. This attribute must be mapped out. The

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Object and Field Coverage information spreadsheet is available at Collaterals for Oracle CX for Financial Services (My Oracle Support Doc ID 2077119.1).

Add or Modify Rules

Rules determine the needs analysis interview decisions. To view the rules in the Needs Analysis project, browse to the Oracle Policy Modeling Rules tab. The rules that control which products are recommended to the customer are available in the **Needs Analysis** folder in the **Rules** folder. The Product Recommendation rule document contains the rules determining which product to recommend and must be configured to match your organization's products.

The needs analysis interview assumes that the following default product types are available:

- Home Loan t1
- Home Loan t2
- Equity Line t1
- Equity Line t2
- CCL Type 1
- CCL Type 2
- New Equip Fin
- Old Equip Fin

You must either change rules to use your own organization's product types or ensure that these product types are defined while setting up the Intelligent Advisor Needs Analysis interviews. For more information on adding or editing rules in Intelligent Advisor, see the section that defines what a rule is in the Policy Modeling User guide listed in Related Topics section in this topic.

Add or Modify Interview Screens

You can add or modify interview screens to display or collect information as required. To edit an interview screen:

1. Go to the Oracle Policy Modeling Data tab.
2. In the pane, select the interview screen that you want to edit.
3. Perform the following changes:
   - To change screen text: Click the text and type the correct text.
   - To add screen text: Click **Add Label**. To control when the text appears, select the text and click **Show If** from the toolbar.
   - To add fields: Click **New Input** and double-click the field that you want to add. You can change the input type and text for each field.
   - To delete screen items: Select the screen item and click **Delete**.

   Changes are automatically saved. To test and deploy your changes, see the section on testing and deploying changes section in this topic.

Change Skin and Layout of the Interview

Most changes to the appearance of interviews are made in the Styles dialog box, which you can access using the Styles button on the Interview tab. For more information on configuring the appearance of the interview, see the section on configuring the appearance of the interview in the Policy Modeling User guide listed in Related Topics section in this topic.

Test and Deploy Changes

To test changes to the interview in the Oracle Policy Modeling Debugger, click the **Debug** button of the **Policy Modeling** page. To update the interview in Oracle CX Sales, you must deploy the interview again to your Intelligent Advisor Hub. To deploy the interview, navigate to the Oracle Policy Modeling Interview tab and select **Deploy Snapshot**.

Related Topics

Create Interviews Using the Intelligent Advisor

A sales administrator can create new interviews using Intelligent Advisor for the supported objects and their child objects. Each of these objects is supported with fixed set of standard fields of different data types such as text, number, fixed choice lists, and currency. You

> **Note:** Intelligent Advisor interviews that are for purposes other than performing needs analysis, can be added to Oracle CX Sales with the purchase of a full Intelligent Advisor license.

The following table lists the supported parent objects and the corresponding child objects.

Object Name	Child Object
Household	Contact
Household	Activity
Household	Lead
Household	Opportunity
Household	Asset
Household	Team
Account	Contact
Account	Activity
Account	Lead
Account	Opportunity
Opportunity	Activity

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Object Name	Child Object
Opportunity	Lead
Opportunity	Revenue Lines
Opportunity	Available Product
Opportunity	Contact
Opportunity	Note
Contact	Opportunity
Contact	Activity
Contact	Lead
Contact	Asset
Partner	Opportunity
Partner	Activity
Partner	Lead
Activity	Contact
Activity	Note
Activity	Resource
Lead	Note
Lead	Available Product
Lead	Product Line
Lead	Activity
Lead	Opportunity
Product	Not applicable

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> **Note:** Custom fields aren't supported in release 12.

Also see Setting Up Intelligent Advisor Interview topic in the Oracle CX for Industries Getting Started with Financial Services Implementation guide.

Design the Interview

For creating interviews with Intelligent Advisor in Oracle CX for Sales object, you must create the entity in Intelligent Advisor and must map with Oracle CX for Sales object. When you create an interview, it's with respect to an Oracle CX for Sales object such as opportunity, lead, or contact. Refer to the supported parent objects and child objects table for the complete list of objects. Before creating an interview, a designer must consider the following decisions:

1. When you deploy the interview, data is loaded based on the primary key of the parent object. An interview designer using the Oracle Policy Modeler can select any parent object listed in the table.
2. The action that you must take while submitting the interview. The available options in Intelligent Advisor and Oracle CX for Sales connector are either to take no action or update the object selected in point 1.

If as a designer, you want to create an interview on the Lead Oracle CX for Sales object, you must create the Lead object in Oracle Policy Manager and create all the required fields in Lead. Each field created in Oracle Policy Manager must be mapped with the available fields in Oracle CX for Sales connector. For some fields you can load data into Intelligent Advisor but you can't update the fields. You can use some fields to load data and you can update the same fields while submitting the interview. If you want to load the data of child objects of a parent object such as Activity of the parent object Lead, you must create same child objects for the parent object in Oracle Policy Manager and map with the child object available in the Oracle CX for Sales connector. You must also create attributes for Activity and map them.

Understand Intelligent Advisor Connector for Oracle CX for Sales

You must know primary key field, required parameters, and dynamic filters to understand the Intelligent Advisor connector.

- Primary Key Field

  The primary key field for every object is mapped in and mapped out. This is important as connector requires the primary key information for updating records. Required fields must be mapped out otherwise the interview won't be deployed. Opportunity and Lead Parent object uses the product child object data for creating revenue lines and product lines respectively.

- Required Parameters

  SurveyCaseId is required query parameter for every interview. While deploying the interview, provide primary key value through SurveyCaseId. SurveyCaseId=<Primary Key Value>.

- Dynamic Filters

  Intelligent Advisor connector for Oracle CX for Sales also supports specification of additional filter criteria as query parameters. For example, if you have an interview with Opportunity as parent object and Activity as child object and you want to display Activity of the type APPOINTMENT, then you can specify the filter criteria using Opportunity.Activity.ActivityTypeCode=APPOINTMENT query parameter.

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Use the Newly Created Interview from Oracle CX for Sales

Create a user-defined link in the Application Composer to use deployed interview on the Intelligent Advisor hub from Oracle CX for Sales and provide the interview URL for the link. Ensure that you specify the primary key as URL parameter **SurveyCaseId** and the Oracle CX for Sales open authentication token.

Related Topics
- Modify Intelligent Advisor Interviews to Meet Organization-Specific Needs

Needs Analysis Interviews for Leads and Opportunities in Commercial Banking

Needs Analysis interviews are available for leads and opportunities in commercial banking. A commercial banker or a commercial bank manager can run Needs Analysis for commercial banking and equipment finance from the Lead and Opportunity Summary pages.

Note: You can create needs analysis interview for opportunity and lead for commercial banking.

Interviews are of two types for commercial banking:

- Commercial loan
- Equipment finance

Following is the process flow:

Needs Analysis link is available on the Edit Opportunity Summary or Edit Lead Summary page.

1. On the Edit Opportunity Summary page, select **Sales Method** as **Commercial Loan**.
2. On the Edit Opportunity Summary or Edit Lead Summary page, select **Opportunity Type** or **Lead Type** as **Commercial Loan**.
3. Click **Needs Analysis**.

    You're navigated to the **Enter Loan Information** train stop of the Intelligent Advisor interview. On the **Enter Loan Information** train stop, the **Loan Purpose** is displayed as **Commercial Loan**.

    Note: The Needs Analysis interview questions change based on the type of loan purpose and the loan type.

4. Enter the **Loan Amount** value.
5. Select an **Interest Type**. Interest type options are fixed, variable, or fixed or variable.
6. Select the **Loan Type** as **Secured**. Loan type options available are Secured and Unsecured.
7. Select the appropriate **Customer Classification** value.
8. Select the appropriate **Risk Profile** value.
9. Click **Next**.

    You're navigated to the **Enter Physical Holdings** train stop.
10. Add physical holdings details and click **Next**.

    You're navigated to the **Enter Deposits** train stop.

11. Add deposits details and click **Next**.

    You're navigated to the **Select Loan** train stop. A list of recommended products are displayed based on information entered in the previous train stops.

12. Select **More information** to view product details, including additional fees.

13. Select at least one product.

14. Click **Next**.

15. View **Loan Payment** train stop and enter extra monthly and yearly loan payment to view the impact on interest versus the principal payment.

16. Click **Next**.

    You're navigated to the **Confirmation** train stop. The product that you selected is displayed.

17. Click **Submit**.

    You're navigated back to the Edit Lead or Edit Opportunity Summary page, the product you selected in Needs Analysis is listed in the Products section.

18. Click the attachment name to view the loan application.

Needs Analysis Interviews for Companies

Needs Analysis interviews are available for companies in commercial banking. Commercial banker or commercial bank manager can run needs analysis from the Account Overview page and create a lead or an opportunity at the end of the process.

Following is the process flow for running Needs Analysis from the Account page:

1. **Needs Analysis** link is available from the Edit Account: Overview page. Click **Needs Analysis**.

    You're navigated to the **Loan Purpose** train stop of the Intelligent Advisor interview.

2. On the **Loan Purpose** train stop, you select the loan purpose. Options available are Commercial Loan and Equipment Finance.

    | **Note:** The Needs Analysis interview questions change based on the type of loan purpose and the loan type that you select.

3. Click **Next**.

4. On the **Enter Loan Information** train stop, when you select the **Loan Purpose** such as **Commercial Loan**, enter the **Loan Amount**.

5. Select an **Interest Type**. Interest type options are fixed, variable, or fixed or variable.

6. Select the **Loan Type** as **Secured**.

7. **Customer Classification** and **Risk Profile** values are populated based on the company details defined in the Oracle CX for Sales.

8. Click **Next**.

    You're navigated to the **Enter Physical Holdings** train stop.

9. Add physical holdings details and click **Next**.

    You're navigated to the **Enter Deposits** train stop.

10. Add deposits and click **Next**.

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You're navigated to the **Select Loan** train stop. A list of recommended products are displayed based on the information entered in the previous train stops.

11. Select **More information** to view fees and down payment details.
12. Select at least one product.
13. Click **Next**.
14. View **Loan Payment** train stop and enter extra monthly and yearly loan payment to view the impact on interest versus the principal payment.
15. Click **Next**.

You're navigated to the **Confirmation** train stop. The product that you selected is displayed. You have the option to create an opportunity or a lead based on customer readiness to buy.

> **Note:** The name of the opportunity or the lead must be unique.

16. Click **Submit**.

You're navigated to Edit Account Overview page and you can see the lead or opportunity that you created in Leads or Opportunities infolet.

17. Click **Leads** or **Opportunities** infolet to navigate to the Edit Account: Leads page or the Edit Account: Opportunities page.
18. Click the **Lead** or **Opportunity** that you created.

On the Edit Lead Summary page or on the Edit Opportunity Summary page, the product you selected in Needs Analysis is added as a revenue line item to the lead or opportunity.

19. On the Edit Account: Leads or Edit Account: Opportunities page, click **Profile** subtab.

Edit Account: Profile page opens.

20. Click the attachment name to view the loan application.

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5 Dashboard Reports

Dashboard Reports for Retail Banking

As a retail banker or a retail bank manager, you must view dashboard reports to stay updated about your leads, opportunities, and service requests. You must understand the reporting capabilities that are available to you to gain insight into the key performance indicators.

The dashboard contains all the key metrics. You can further click a dashboard infolet to drill down to the details to view the related transactional data.

1. **Actual vs Quota**

   Actual vs Quota report displays information on opportunities related to selling financial products. This information enables retail banker and retail bank manager to understand the gap between the actually won revenue and the quota available.

2. **Top Loans**

   Top Loans report displays information on open loan opportunities for the current quarter whose win percentage is 70 or more. The report includes win percentage, name, customer, sales stage, close date, and amount details of each loan application. Table is sorted based on descending order of amount.

3. **Loan Pipeline**

   Loan Pipeline report displays information on the total revenue amount available for loans, amount given to customers in the form of loans, and the amount available to be granted as loans. The Pipeline report also displays how much amount is at which specific sales stage of the loan.

4. **Push Applications**

   Push Applications report highlights loan applications with close dates changed at least thrice within the current quarter. The report includes win percentage, name, customer, sales stage, close date, and amount details of each loan application.

5. **Refinance Deals**

   Refinance Deals report focuses on all the home refinance opportunities and includes win percentage, name, customer, sales stage, close date, and amount details of each loan application.

6. **Representative Performance**

   > **Note:** A retail banker sees similar views in reports except for Representative Performance. Representative Performance is available to a retail bank manager.

   Representative Performance report displays the total won revenue amount and the performance reports of retail bankers in terms of the sales quota that each retail banker attained. Top performer and bottom performer names are displayed on the infolet. Top performer is the retail banker that attained the highest quota.

7. **Top 5 Products for Opportunities**

   Top 5 Products Opportunity report displays information related to the top 5 products such as home loans, personal loans, equity loans, credit lines in an open opportunity based on the current quarter revenue amount. Click the bar graph for any of the products and you can see the detailed report with the list of opportunities

closed for each of the product. The report includes win percentage, name, customer, close date, and amount details.

8. Top 5 Products for Leads

    Top 5 Products Lead report displays information related to the top 5 products such as home loans, personal loans, equity loans, credit lines in an open lead based on the current quarter revenue amount. Click the bar graph for any of the products and you can see the detailed report with the list of leads for the product in a table. The report includes name, customer, primary contact, deal size, status, and age in days details.

Dashboard Reports for Commercial Banking

Dashboard for commercial banker and commercial bank manager supports the reporting requirements of the business banking. The reports that are available are Actual vs Quota, Loan Pipeline, Loan Performance Year To Date, Top Loans, Loans Underwritten Year To Date, Push Applications, Top 5 Products

> **Note:** In addition to these reports, `Rep Performance` report is the report available for Commercial Bank Manager role.

Following is the process flow:

- Sign into Oracle CX for Sales as a Commercial Banker or Commercial Bank Manager.

- From the landing page, click the pagination control for **Sales Infolets**.

- Following report infolets configured for commercial banking are displayed. Click each of them to view the detailed report.

    o Actuals vs Quota

       Actual vs Quota report displays information on opportunities related to selling financial products of types such as commercial loan and equipment finance. This information enables commercial banker and commercial bank manager to understand the gap between the actually won revenue and quota. Drill in to the report to see the revenue amount that was won across different opportunity types such as commercial loan and equipment finance.

    o Loan Pipeline

       Loan Pipeline report displays information on the total revenue amount available for loans, won revenue, and the open pipeline. The report identifies the number of loans closing in the current quarter. The Pipeline report also displays how much amount is in which specific stage of the loan. Click any Sales Stage to drill into and view opportunities available in that stage. Win percentage, name, customer, close date, and amount details are available.

    o Loan Performance Year To Date

       This report provides the consolidated view of the total loan underwritten year to date. Drill in to view the Detailed Report. Detailed Report page opens that displays a line graph representing the loan amount across different months.

       > **Note:** The current enterprise year is based on the user-defined calendar setting.

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- o Top Loans

  Top Loans report displays information on open loan opportunities for the current quarter whose win percentage is 70 or more. Win percentage is calculated based on the sales stage of the loan. The report includes win percentage, name, customer, sales stage, close date, and amount details of each loan application. Table is sorted based on descending order of amount.

- o Loans Underwritten Year To Date

  This report provides the consolidated view of total opportunities won in the form of total loans underwritten year to date with break down into commercial loans and equipment finance. This report displays the total amount of loans underwritten with the bar graphs depicting the distribution of opportunity revenue across opportunity types such as commercial loan and equipment finance.

- o Push Applications

  Push Applications report highlights all the loan applications with close dates changed at least thrice within the current quarter. The report includes win percentage, name, customer, amount, close date, and sales stage details of each loan application.

- o **Rep Performance**

  This report is visible to managers. This report displays the performance of sales representatives reporting to the manager. Top performer and bottom performer names are displayed on the infolet.

  Representative Performance reports are of two types:

    - Attainment Percentage: The attainment percentage is calculated based on the revenue closed with respect to the target quota set for the sales representative. This report is based on the percentage of quota attainment.
    - Won Revenue: This report is based on the total revenue amount that sales representatives have won.

- o Top 5 Products for Opportunities

  Top 5 Products Opportunity report displays the top 5 revenue generating products of types commercial loans and equipment finance based on the current quarter revenue amounts with which the opportunities were closed. Click the bar graph for any of the products and you can see the detailed report with the list of opportunities closed for each of the product. The report includes win percentage, name, customer, close date, and amount details.

- o Top 5 Products for Leads

  Top 5 Products Lead report displays the top 5 products of types commercial loans and equipment finance based on the revenue generating leads. Click the bar graph for any of the products and you can see the detailed report with the list of leads for the product in a table. The report includes name, customer, primary contact, deal size, status, and age in days details.

Sales Methods for Retail Banking and Commercial Banking

In the Loan Pipeline report, for retail banking, the sales method available for selection is Retail Banking. For commercial banking, the sales methods available for selection are Commercial Loans and Equipment Finance.

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> **Note:** See Changing Filters for Loan Pipeline Report topic in the Getting Started with Financial Services Implementation guide to add any additional sales methods or to make changes to the existing default filters for retail banking, and commercial loans and equipment finance sales methods.

You can see the Loan Pipeline report to view and understand the sales methods available for retail banking and commercial banking. Following are the steps to view sales method for retail banking:

1. Sign in as a Retail Banker or Retail Bank Manager.
2. On the landing page, click the pagination control to view the Loan Pipeline infolet.
3. Click **Loan Pipeline** infolet.

   Detailed Report page opens. Loan Pipeline information is available for the current quarter together with the Sales Stage versus Revenue graph. The value corresponding to the **Sales Method Name** field is **Retail Banking**.
4. Click **Done**.

Following are the steps to view sales method for commercial banking:

1. Sign in as a Commercial Banker or Commercial Bank Manager.
2. On the landing page, click the pagination control to view the Loan Pipeline infolet.
3. Click **Loan Pipeline** infolet.

   Detailed Report page opens. Loan Pipeline information is available for the current quarter together with the Sales Stage versus Revenue graph. The values corresponding to the **Sales Method Name** field are **Commercial Loans** or **Equipment Finance**.
4. Select the appropriate value and click **Done**.

6 Adaptive Case Management

Overview of Adaptive Case Management for Financial Services

Adaptive case management refers to business process management for handling complex sales and service processes that require actions and decisions from multiple departments, roles, and disparate solutions for dynamic situations such as handling a deceased estate and moving to a new house location.

About Adaptive Case Management

In the context of financial industries, there are many long running complex tasks that require multiple actors such as relationship managers, consumers, and back office users and execution of each task can change the course of the process flow. For example, insurance experts must take a decision on claims based on the available data and depending on the claim acceptance status such as partial or full or rejection, different sets of actions must be processed.

Significance of Adaptive Case Management

There are three significant aspects:

- Improves efficiency: Each actor such as service representative, service manager, and back officer user are guided through a standard compliant process whereby any actionable tasks are available to the actors.

- Rolls out compliant processes: Helps achieve compliance with government rules and bank policies.

- Improves customer experience: The representatives have an overall knowledge of the running process beyond the current status and current pending tasks. Hence, they can help customers more effectively rather than just reporting the current status.

Integrate Processes for Oracle Integration with Oracle CX for Sales

Adaptive case management examples include complex processes in banks requiring action from multiple parties such as the Deceased Estate process flow. Case is defined as a business process for handling either sales or service process. The execution of adaptive case management requires processes to be modeled in Processes for Oracle Integration and initiation of these processes is possible through an integration between Processes for Oracle Integration and Oracle CX for Sales. Using Oracle CX for Sales, you can initiate the execution of all the subprocesses within the process flow through the integration of Processes for Oracle Integration with Oracle CX for Sales. Integration supports process management (both definition and execution) for all industries including financial services. Processes for Oracle Integration enable you to create process templates. Deceased estate process template is created using the Processes for Oracle Integration. Each process or case has multiple stages. Each stage can have multiple subprocesses and each subprocess can also have multiple steps. In Processes for Oracle Integration, there are two types of tasks, human tasks and system tasks. Human tasks are the actions that are enabled and assigned to bankers or bank agents to view, assign actions, and complete them.

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Deceased Estate Process and Key Roles

The Deceased estate process refers to the transfer of the bank accounts from the deceased to the beneficiaries. The following three key roles form this process flow:

- Reporter of the demise will initiate the process to transfer ownership of the deceased's assets to their name.

- Bank customer service executive who helps customers resolve their queries and advises customers on the process to be followed and related documentation associated with it.

- Bank customer service relationship manager, responsible for verifying the deceased details, documentation, and finally approves the service requests.

- Back officer user would complete the tasks such as removal of the deceased from marketing lists and informing tax, credit card, and retirement companies of demise.

Sequence of Process Flow

Following is an example of the process flow:

1. A customer of the bank dies due to heart attack.
2. Wife initiates the process to transfer asset ownership.
3. Wife calls up customer service executive of the bank to let him know of her husband's demise.
4. The customer service executive adds further details to the service request by asking about beneficiary, asset transfer, and collects documents.
5. For transfer of asset ownership, the customer service executive creates a service request of the type **Deceased Estate**.
6. Customer service executive contacts the customer and checks the customer record of the deceased.
7. Customer service executive initiates the process. He then uploads the documents and fills out additional information.
8. Customer service relationship manager, receives a notification to approve the details. The manager studies and provides approval.
9. The remaining tasks are completed and change of ownership for the deceased's wife is finally completed.

Stages of Deceased Estate Process Template

Declarative Demise: This is the stage in which the service representative provides all the details such as the death certificate, identity proof of the reporter, identity proof of the deceased, and adds further details about the employer and the insurance.

Administrative Stage: This is the stage where the manager would receive the task notification for approval. Manager verifies deceased details and approves it.

Tasks within 2 Weeks: These tasks include removal of the deceased information from marketing lists. There are other related tasks such as informing tax office of death, informing credit card companies, informing mortgage companies, and informing retirement companies.

Tasks within 4 Weeks: In this stage, the service representative meets beneficiaries and the executor.

Actual Transfer of Assets to Beneficiaries: Deceased bank accounts are closed, this is possible due to integration with the banking platform. Beneficiaries, in case they aren't customers, are invited to become customers, and the inheritance process is completed.

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Adaptive Case Management for the Deceased Estate

There are a series of sequential steps for adaptive case management for the deceased estate.

Following are the steps:

1. Sign into Oracle CX for Sales using service representative role.
2. Click **Service > Service Requests** on the dashboard to navigate to Service Requests page.
3. On the Service Requests page, click **Service Requests** tab.
4. On the Service Requests page, click **Create Service Request** button to create a new service request.

    Create Service Request page opens.
5. Corresponding to the **Title** field, enter any suitable title such as the Deceased Estate process.
6. Specify **Type** as **Deceased Estate** from the drop-down list.
7. Corresponding to the **Deceased Name** field, enter the name of the deceased.
8. Corresponding to the **Date of Death** field, specify the date of death.
9. Corresponding to the **Channel Type** field, specify the appropriate channel such as **Phone**.
10. Click **Save and Continue**.

    Edit Service Request: Summary page opens.
11. Corresponding to the **Reporter** field, specify the reporter name.
12. Click **Save**.
13. To collect additional details about the beneficiary, for account transfer asset ownership, and the relevant documentation, as the service representative, click **Add Details** link on the Service Requests Summary page to deploy an Intelligent Advisor interview.

    Welcome train stop opens. Reporter name, deceased customer name, deceased customer email, and deceased customer phone details are available. These details are auto-populated from Oracle CX for Sales.
14. Click **Next**.

    Contacts train stop opens. Here, the following types of questions are asked:

    ○ Would you classify yourself as beneficiary?

    ○ Does the estate has other beneficiaries?

    ○ Does the estate have an executor and other contacts?

15. If you select **Yes**, then you can see the **Add New Contact** option. Here, the following question is asked:

    ○ Would you like to provide any contact's details such as contact first name, contact last name, contact phone number, contact email, and contact role (beneficiary)?
16. Click **Next**.

    Accounts and Credit Cards train stop opens. Here, the beneficiary can view that the deceased has accounts and credit cards details that deceased has with the bank. Following questions are asked for the account and the credit card, which of these two must be transferred?

    ○ Would you like to change the deceased's account to be in your name?

    ○ Would you like to change the deceased's credit card to be changed to your name?

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17. Select **Yes** for both these questions.

18. Click **Next**.

Upload Documents train stop opens. Here, upload the following documents:

- ○ Deceased's death certificate
- ○ Deceased's identity proof
- ○ Beneficiary's identity proof

19. Click Add to attach the appropriate document such as driving license of the beneficiary, death certificate of the deceased, and passport copy of the deceased.

The documents are added.

20. Click **Submit**.

Submission is done and **Finished** train stop is displayed.

21. Click **Done**.

You're navigated to the Service Requests page. Edit Service Request: Summary page with the new service request opens.

22. Click **Contacts** tab.

On the Edit Service Request: Contacts page, you can see that the primary contact and secondary contact names are displayed.

23. Click **Summary** tab.

Edit Service Request: Summary page is displayed.

24. Click **Initiate Action Plan** button to initiate the action plan.

Edit Service Request: Summary page is displayed. You can see that the **Status** is changed from **New** to **In Progress**. **Process Status** is indicated as **Activated**.

25. Click **Save**.

26. Click **Assigned Actions** tab.

Edit Service Request: Assigned Actions page opens.

27. Click **Submit** icon corresponding to **Upload the death certificate for: Deceased** to upload the death certificate.

Upload the death certificate for: Deceased page opens.

28. Scroll down to the **Documents** section.

29. Click **Application Documents** link.

Application Documents page opens.

30. Use the **Upload** option to upload the death certificate.

31. After the upload process is completed, close the **Documents** window.

32. Click **Submit** on the Upload the death certificate for: Deceased page.

Performed Submit action on the task message is displayed. On the Edit Service Request: Assigned Actions page, after you submit, the next task automatically appears.

33. Click **Submit** icon corresponding to **Approve document quality for: Deceased**.

Action Confirmation window appears.

34. Enter comments if any, click **OK**.

Performed Approve action on the task message is displayed.

35. Click **Submit** icon corresponding to **Add Details to SR**.

Add Details to SR page opens. Form is displayed. Employer Name, Insurance Carrier, and Insurance Amount fields must be filled.

36. Click **Submit**.

Action Confirmation window is displayed.

37. Enter comments if any, click **OK**.

Performed Submit action on the task message is displayed.

38. Click **Submit** icon corresponding to **Identify the Reporter for SR**.

Action Confirmation window is displayed.

39. Enter comments if any, click **OK**.

Performed Submit action on the task message is displayed.

40. Click **Submit** icon corresponding to the **Get the identity proof of deceased for SR**.

Action Confirmation window is displayed.

41. Enter comments if any, click **OK**.

With this step, the service representative has completed all the tasks assigned to him.

42. Sign into Oracle CX for Sales as a service manager and click **Service > Service Requests** on the dashboard.

43. Click **Service Requests** tab.

The manager can view all the service requests.

44. In the Advanced Search window, set **Saved Search** as **My Open Service Requests**, click **Search**.

Manager can click any particular service request reference number displayed in the list of service requests and view details of that particular service request on the Edit Service Request: Summary page.

45. The manager can click **Assigned Actions** tab to check the assigned actions.

Edit Service Request: Assigned Actions page is displayed with the list of assigned actions such as the action to verify deceased details.

46. The manager can also click **Action Plan** tab to view the action plan.

Edit Service Request: Action Plan page is displayed.

> **Note:** This is the consolidated process view available. Timeline view and action group views are available. The timeline view includes details about the start date, declarative demise completed day. The action group view includes details about actions such as Declarative Demise, Administrative, Tasks within 2 weeks, Tasks within 4 weeks, and Process Inheritance.

Cancel Action Plan for the Deceased Estate

If there are any circumstances, where the reporter isn't interested in pursuing the service request, the Cancel Action Plan option is available.

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Following are the steps for canceling action plan for the deceased estate:

1. On the Edit Service Request: Summary page, click **Cancel Action Plan** button.

    On the Edit Service Request: Summary page, **Status** is displayed as **Canceled**. **Process Status** is **Canceled**.

2. Click **Save**.

3. Click **Action Plan** tab.

    Edit Service Request: Action Plan page opens. You can see that all the pending actions are no longer available and the **Status** is **Canceled**. Also, on the Edit Service Request: Action Plan page, you can see that there are no activities to act on. In the action group view, you can see that various actions such as Declarative, Administrative, Tasks within 2 weeks, Tasks within 4 weeks, and Process Inheritance are all terminated.

4. On the Edit Service Request: Action Plan page, in the **Activities** tab, click Audit.

    Process Inheritance status is displayed as **Terminated**. Let's see the consolidated view now.

5. Click **Home** icon.

    As a service representative, I can see consolidated view of all my tasks.

6. Click **My Tasks** icon.

    My Tasks page opens. Here's the list of all the tasks that you're involved with as a sales representative is displayed.

7. Click **Submit** icon corresponding to any task.

    Action Confirmation dialog box opens.

8. Click **OK**.

    The task is removed from the list of tasks on the My Tasks page.

9. Click **Home** icon.

10. To see the exact status of the service request that you're involved with, click **My Worklist** icon.

    My Worklist page opens. Here you can view the list of all the tasks that you're involved with as the sales representative.

    > **Note:** The service request ID number is also available with each task name.

11. Click **Details** icon corresponding to the task.

    Inheritance Management for: Deceased page opens. Action Plan view is available with the list of activities. As the service representative, you can look at the list of activities, identify exactly where the service request is, and can report the status.

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