Oracle® TeleService

User Guide

Release 11*i*

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Oracle TeleService User Guide, Release 11*i*

Part No. B14149-01

Contents

3 Managing Customer Records

4 Managing Customer Invoices and Payments

5 Managing Customer Orders

6 Viewing a Customer's Service Entitlements

7 Managing a Customer's Installed Base

8 Managing Customer Contacts

9   Managing Notes on Customers and Contacts

10   Managing Service Requests from the Contact Center

11   Managing Service Requests

14   Managing Service Request Tasks

15   Sending Collateral from the Contact Center

16   Managing Critical Customers

17 Using Relationship Plans

18 Communicating With Your Customers

19   Useful Utilities

20   Using Charges

A   Useful Interface Tools

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You can send comments to us by electronic mail to mfgdoccomments_us@us.oracle.com. Please include your product name in the subject line: Attn: Oracle TeleService.

If you would like a reply, please give your name, address, telephone number, and (optionally) electronic mail address.

If you have problems with the software, please contact your local Oracle Support Services.

Preface

Audience for This Guide

Welcome to Release 11*i* of the Oracle TeleService User Guide.

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

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

  If you have never used Oracle TeleService, Oracle suggests you attend one or more of the Oracle TeleService training classes available through Oracle University.

  To learn more about the Oracle Applications graphical user interface, read the *Oracle Applications User's Guide*.

See Other Information Sources for more information about Oracle Applications product information.

How To Use This Guide

This document contains the information you need to use Oracle TeleService.

- Chapter 1 provides a brief overview of the application and the functionality provided through key integrations with other Oracle E-Business Suite application modules.
- Chapter 2 details the user procedures required to search and display customer and contact records.
- Chapter 3 describes procedures for creating, updating, and managing customer records.
- Chapter 4 describes procedures for managing customer invoices and payments from the Contact Center.
- Chapter 5 describes procedures for viewing and creating orders from the Contact Center.

- Chapter 6 describes procedures for viewing customer service entitlements and reviewing coverage.

- Chapter 7 describes procedures for viewing, updating, searching for, and creating customer installed base records from the Contact Center

- Chapter 8 describes procedures for creating, updating, and managing customer contact records.

- Chapter 9 describes procedures for viewing and adding notes for customers and contacts from the Contact Center.

- Chapter 10 describes how Tier-1 agents can manage service requests within the Contact Center.

- Chapter 11 describes how Tier-2 agents can use service requests to manage the resolution of customer problems from the time a customer contacts the organization through resolution.

- Chapter 12 describes procedures for managing asset maintenance service requests for internal assets from the Service Request module.

- Chapter 13 describes procedures for managing customer tasks from the Contact Center.

- Chapter 14 describes procedures for managing service request tasks.

- Chapter 15 describes procedures for sending collateral to a customer contact from the Contact Center.

- Chapter 16 describes how agents can manage the status of customers that have been flagged as critical by the application.

- Chapter 17 describes how agents can view and modify relationship plans for a particular customer. Relationship plans monitor customer statistics, such as the number of escalated service requests, and alert agents with messages or scripts whenever a customer has a reached a predetermined level.

- Chapter 18 describes the different ways agents communicate with customers via the telephone, e-mail, and Web.

- Chapter 19 describes useful utilities for service request management, including procedures for escalating and auditing service requests.

- Chapter 20 describes how agents can charge for services, review and submit field service charges, and create different kinds of returns.

- Appendix A describes a few basic procedures for manipulating data in dynamic tables and using Oracle Forms folder tools.

Documentation Accessibility

Our goal is to make Oracle products, services, and supporting documentation accessible, with good usability, to the disabled community. To that end, our documentation includes features that make information available to users of assistive technology. This documentation is available in HTML format, and contains markup to facilitate access by the disabled community. Standards will continue to evolve over time, and Oracle is actively engaged with other market-leading technology vendors to address technical obstacles so that our documentation can be accessible to all of our customers. For additional information, visit the Oracle Accessibility Program Web site at http://www.oracle.com/accessibility/.

Accessibility of Code Examples in Documentation

JAWS, a Windows screen reader, may not always correctly read the code examples in this document. The conventions for writing code require that closing braces should appear on an otherwise empty line; however, JAWS may not always read a line of text that consists solely of a bracket or brace.

Other Information Sources

You can choose from many sources of information, including online documentation, training, and support services, to increase your knowledge and understanding of Oracle TeleService.

If this guide refers you to other Oracle Applications documentation, use only the Release 11*i* versions of those guides.

Online Documentation

All Oracle Applications documentation is available online (HTML or PDF). Online help patches are available on Oracle*MetaLink*.

Related Documentation

Oracle TeleService relies on other Oracle Applications products and modules for much of its functionality. Therefore, you must refer to other product documentation to effectively use Oracle TeleService.

You can read these documents online by choosing Library from the expandable menu on your HTML help window, by reading from the Oracle Applications Document Library CD included in your media pack, or by using a Web browser with a URL that your system administrator provides.

If you require printed guides, you can purchase them from the Oracle Store at http://oraclestore.oracle.com.

Documents Related to All Products

Oracle Applications User's Guide

This guide explains how to enter data, query, run reports, and navigate using the graphical user interface (GUI) available with this release of Oracle TeleService (and any other Oracle Applications products). This guide also includes information on setting user profiles, as well as running and reviewing reports and concurrent processes.

You can access this user's guide online by choosing, "Getting Started with Oracle Applications" from any Oracle Applications help file.

Documents Related to This Product

Oracle TeleService Implementation Guide

Many of the topics in this guide can be used for application administration on an ongoing basis. These include instructions on how to set up customer profiles, the dashboard, relationship plans, and the automatic assignment of service requests.

Oracle Advanced Scheduler Concepts and Procedures

This guide describes how to use the Oracle Advanced Scheduler to schedule field-service tasks.

Oracle Collections User Guide

This guide can help agents to understand concepts for managing invoices and payments.

Oracle Common Application Components User's Guide

This guide explains how to use the Assignment Manager, Resource Manager, Task Manager, Notes, Escalation Management, and other Common Application Components.

Oracle Contracts Core Concepts and Procedures

This guide explains how to author and administer contracts. This guide is a prerequisite for understanding Oracle Service Contracts.

Oracle Enterprise Asset Management User's Guide

This guide describes how to use Oracle Enterprise Asset Management to maintain internal assets for an organization.

Oracle Enterprise Install Base User Guide

This guide describes how to use the installed base for tracking your organization's internal assets.

Oracle Field Service User Guide

This guide can help Oracle TeleService agents understand how field service agents create debriefs, which can be reviewed in the Charges module.

Oracle Install Base User Guide

This guide describes how to use the installed base for tracking customer items and record item usage using counters.

Oracle iSupport User Guide

This guide is useful for agents to understand how customers interact with the service organization via a self-service Web-portal.

Oracle Knowledge Management User Guide

This guide explains the different ways agents can search the knowledge base to resolve customer problems and how they can author new knowledge base solutions.

Oracle Order Management User's Guide

This guide explains how to book orders that have been submitted through Oracle TeleService's Charges module. Booking is required for an order to be processed.

Oracle Service Contracts Concepts and Procedures

This guide explains how to understand and manage service contracts.

Oracle TeleSales User Guide

This guide can help agents to understand concepts for sending collateral to customers.

Oracle Universal Work Queue User Guide

This guide explains how agents can use the work queue to manage their work and handle customer calls using the icWork Controller and Softphone.

Training and Support

Training

Oracle offers training courses to help you and your staff master Oracle TeleService and reach full productivity quickly. You have a choice of educational environments. You can attend courses offered by Oracle University at any one of our many Education Centers, you can arrange for our trainers to teach at your facility, or you can use Oracle Learning Network (OLN), Oracle University's online education utility. In addition, Oracle training professionals can tailor standard courses or develop custom courses to meet your needs. For example, you may want to use your organization's structure, terminology, and data as examples in a customized training session delivered at your own facility.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle TeleService working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle9*i* server, and your hardware and software environment.

Oracle*MetaLink*

Oracle*MetaLink* is your self-service support connection with Web, telephone menu, and e-mail alternatives. Oracle supplies these technologies for your convenience, available 24 hours a day, 7 days a week. With Oracle*MetaLink*, you can obtain information and advice from technical libraries and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use Oracle*MetaLink*, register at (http://metalink.oracle.com).

Alerts: You should check Oracle*MetaLink* alerts before you begin to install or upgrade any of your Oracle Applications. Navigate to the Alerts page as follows: Technical Libraries/ERP Applications/Applications Installation and Upgrade/Alerts.

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

Do Not Use Database Tools to Modify Oracle Applications Data

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

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

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

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

About Oracle

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

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

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

1

About Oracle TeleService

This section provides an overview of Oracle TeleService, its components, and key integrations. It covers:

- About Oracle TeleService
- Key Integrations

1.1 About Oracle TeleService

Oracle TeleService makes it possible for service organizations to lower support costs and deliver superior personalized service at the same time. It does so by automating not just the call center but the whole problem resolution process from the time a customer calls in, sends an e-mail, or enters a service request on the Web. Agents can use Oracle TeleService to update customer records, validate product ownership and contract coverage, provide proactive and personalized customer service, and resolve many problems during the initial contact using a knowledge base.

Oracle TeleService is composed of the following modules:

- Customer Care
- Service Request
- Charges

1.1.1 Customer Information Management Through Customer Care

The Customer Care module is designed to help Tier-1 customer service agents manage customer information and quickly enter service requests.

Agents can use it to identify customers, enter and modify customer information, view the history of the organization's past interactions with the customer, and manage the customer relationship.

Because Oracle TeleService uses the same data repository for customer information as the rest of the Oracle E-Business Suite, any notes or changes agents make to customer data are automatically reflected in all other applications.

The module makes it possible for agents to:

- Manage customer information using the Contact Center
- View key information about a customer
- Receive automatic alerts about customer status via Relationship Plans
- Manage customer criticality
- Resolve customer problems by searching the organization's knowledge base
- Quickly create service requests
- Handle customer inquiries through multiple media

1.1.1.1 Managing Customer Information Using the Contact Center

Customer Care's Contact Center window provides the central place for Tier-1 agents to view and update customer information that has been collected by the entire Oracle E-Business Suite of applications.

Agents can access not only addresses, contacts, and information about the relationships the customer has with other customers, but also a record of all past interactions your organization has had with that customer, including e-mails, phone calls, and site visits. Agents can read notes posted by the entire organization about a customer and know which products the customer has purchased, their service history, and any contractual agreements that apply.

Putting all the information about customers at agents' fingertips not only speeds up issue resolution but also eliminates the need for customers to repeat the same information over and over again as their problem gets passed through your organization.

The flexible customer model used by the Oracle E-business Suite captures information about the whole range of business and personal relationships, making it possible for agents to know that a caller belongs to a subsidiary of a major customer and so is entitled to the same level of service and the same discounts as the parent company, for example. Or that the person on the line is the brother of the CEO of an important customer.

1.1.1.2 Principles of the Customer Care User Interface

The user interface has been designed to allow Tier-I agents to decrease call resolution times through the use of IVR Integration and Service Keys.

IVR Integration

If a customer enters an identifier such as service request number in the IVR, the agent will immediately view the customer and contact information on the Contact Center header.

IVR parameters include:

- Phone number

- Service Request Number

- Serial Number

- Tag Number

- System Name

- RMA number

- Contract Number

- Order Number

- Invoice Number

- Instance Name

- Social Security Number

If any of the above identifiers are entered in the IVR by a customer, the appropriate tab is displayed with the summary information of the transaction.

Service Keys

Agents can use service identifiers or Service Keys directly from the Contact Center header to identify customer quickly. Service Keys include:

- Contract Number

- Instance Name

- Invoice Number

- Order Number

- RMA Number

- Social Security Number

- Serial Number

- Service Request Number

- System

- Tag Number

If any of the above identifiers are used for customer identification, the appropriate tab is displayed with the summary information of the transaction.

1.1.1.3 Viewing Key Information About a Customer

The Dashboard tab of the Contact Center window provides agents with a color-coded graphical display of key customer information so they know the customer they are helping.

What is the level of customer satisfaction, high or low? Is the customer loyal or critical? The credit rating good or bad?

At a glance agents can see how many escalated service requests a customer has, for example, how much they purchased, and if they are behind on their payments.

The summaries are hyperlinked to the underlying information, so agents can display the details of the individual escalated service requests or purchases with a couple of clicks of the mouse.

The administrator can configure different summaries of key customer information, called Customer Profiles, for different roles in your organization to give everyone an overview of the information that is most critical to them.

1.1.1.4 Receiving Automatic Alerts About Customer Status via Relationship Plans

Your organization does not have to rely on agents to view the Dashboard and make the judgment calls on what information about a customer is important. The organization can set up business rules, called Relationship Plans, which automatically alert agents whenever the customer meets certain conditions. That way agents know they are talking to customer has a contract about to expire, a product needs upgrading, or when the customer would be better off purchasing a new product entirely because the old one no longer meets their needs. Relationship Plans, which monitor customer information behind the scenes, can even pop up a script so an agent knows what to say when talking with the customer.

1.1.1.5 Managing Customer Criticality

Your service organization can define rules that automatically flag a customer as critical. Agents can over-ride the criticality designation, escalate the problem, or initiate proper action to resolve it.

1.1.1.6 Resolving Customer Problems by Searching the Organization's Knowledge Base

Agents can resolve many customer requests by searching the organization's knowledge base. This can include structured solutions, FAQs, and documents on internal Web sites.

1.1.1.7 Quickly Creating Service Requests

For requests that cannot be resolved through knowledge base searches, agents can quickly create simple service requests using the same window where they verify customer information. Or they can enter a service request for follow-up by Tier-2 agents.

1.1.1.8 Handling Customer Inquiries Through Multiple Media

Oracle TeleService makes it possible for agents to handle customer inquiries via phone, e-mail, and the Web.

1.1.2 Service Request Management

The Service Request module (in previous releases known as Oracle Support) is designed to permit Tier-2 agents create and manage customer or employee requests for service from the time the customer contacts the organization or logs a service request on the Web until the problem is resolved.

All operations can be performed in or initiated from the Service Request window.

Organizations can define different business processes for handling different request types such as complaints, product breakdowns, and accounting questions.

The module makes it possible for agents to:

- Search the organization's knowledge base and suggest solutions

- Manually or automatically assign the service request to the group or person most appropriate to handle it

- Keep customer contacts and agents informed about a service request through automatic notifications

- Make related documents available for other agents working on the service request at the click of the mouse

- Check contracts, apply entitlements, and have the application automatically enter resolution times to ensure your organization meets its contractual obligations

- Create, assign, and schedule tasks required to resolve the problem

- Keep customer contacts and other member of the team informed through automatic notifications

- E-mail customers about the service request or communicate with them via their Oracle iSupport self-service Web portal

- Automatically open the next service request that should be worked on with the click of a button.

1.1.3 Managing Returns and Service Billing Through Charges

Using the Charges module, which occupies a tab of the Service Request window, agents can bill customers for their services, review and submit bills for labor and material costs incurred in the field, and create product returns for repair, loan, or replacement. The application automatically applies discounts and contractual terms and the charges are ready for processing by Oracle Order Management.

1.2 Key Integrations

What level of functionality agents receive from the Oracle TeleService application depends on implementation of different components of the Oracle E-Business Suite. This section explains the functionality added by:

- Common application components

- Service suite foundation

- Key integrated applications

1.2.1 Common Application Components

Oracle TeleService makes use of common Oracle E-Business Suite application modules. Key functionality is delivered by:

- Oracle Universal Work Queue (UWQ): This is where agents obtain their work assignments, including service requests, tasks, and Web callbacks. The UWQ

also provides the interface for handling calls. Agents receive inbound calls via their icWork Controller (Softphone) by logging into a work queue.

- Assignment Manager: Provides agents with the ability to assign resources to a task or a service request based on service territories, qualification, availability, and geographic location.

- Resource Manager: This module stores the skill levels of your organization's field technicians and agents. Agents use this information to assign the right technician for the job either manually or automatically.

- Notes: This module makes it possible for all employees of the company to share notes on customer and customer issues and to communicate with customers through the Oracle iSupport Web portal.

- Task Manager: The task manager makes it possible to assign, reassign, and prioritize tasks needed to deliver service to the customer. Assigned tasks appear as work items in the assignee work queues. Tasks can also be synchronized with Microsoft Outlook and Palm devices through functionality provided by this module.

> **Note:** Agents should manage tasks from the Oracle TeleService user interface. The Task Manager user interface is read only for service request tasks. You cannot use Task Manager to update service request tasks.

- Territory Manager: Your organization can use the territory manager to set up service territories that the service suite uses to automatically assign tasks to employees based on their skill, geographical location, and other criteria. Your organizations runs concurrent programs to make the work assignments themselves.

- Escalation Management and Business Rule Monitor: Using Escalation Management and the Business Rule Monitor, agents can re-prioritize, reassign, and monitor a situation to a satisfactory completion.

- Oracle One to One Fulfillment: This module makes it possible for you to e-mail or fax copies of service requests to customers.

1.2.2 Service Suite Foundation

Three applications provide key functionality for Oracle TeleService and form the foundation for all service suite applications:

- Oracle Knowledge Management

- Oracle Install Base

- Oracle Enterprise Install Base

Oracle Knowledge Management

The integration with Oracle Knowledge Management makes it possible for agents using Oracle TeleService to search for solutions to customer problems.

Oracle bundles knowledge management tools with all service suite applications. The tools make it possible for your organization to build and maintain an enterprise-wide repository of knowledge ranging from office procedures to technical troubleshooting solutions. Your organization can develop solution templates in a wide variety of formats from simple questions and answers to product bulletins, FAQs, troubleshooting guides, and product documentation. The organization can make different knowledge management solutions available to different audiences: to call center agents, field technicians, and customers logging in on the Web portal.

Oracle Install Base and Oracle Enterprise Install Base

Integration with the installed base applications makes it possible for Oracle TeleService agents to log service requests against items owned by either customers or employees.

Oracle Enterprise Install base tracks the internal assets of an organization.Oracle Install Base tracks customer assets. Both products center on a repository of product data recording the location, configuration, status, ownership, account(s), change history, and party relationship(s) for products, software licenses, and other assets.

The repository tracks an asset from the time it is received in inventory, in WIP (Work in Process), in projects, at the customer site, or in for repair. Cradle-to-grave tracking follows the asset as it passes through the various divisions of a company (inventory, purchasing, orders, shipping, and service).

An instance record describes the set of parts constituting a specific physical unit. Knowing the exact composition of the product to be serviced enables the service provider to ensure that the needed parts are available before dispatching a technician; makes it unnecessary for the support agent to ask customers questions about the product's makeup; and makes it possible for an in-house repair center to have a customer ship back to the service center only those parts needed for the repair.

The installed base instance record is the foundation for after-market service, including regularly scheduled maintenance tasks and unplanned maintenance, and it tracks contract and warranty entitlements for the asset it represents. The organization can track the usage of a product or service via the Counters module. For example, a copying machine service company can use counters to record the number of copies made by a particular machine and bill customers based on usage. Usage data can trigger service business processes such as the scheduling of preventive maintenance or overhauls; the renegotiating of service, rental, and leasing contracts; the reordering or shipping parts; and for calculating product reliability.

1.2.3 Key Integrations with Other E-Business Suite Applications

Because Oracle TeleService is fully integrated with the Oracle E-Business Suite each additional application you implement provides additional functionality for your service organization. To get the most out of Oracle TeleService your organization must implement at least the applications listed in this section.

Oracle iSupport

Self-service Web portals built with Oracle iSupport make it possible for customers and employees to log and monitor their service requests. Oracle TeleService agents can publish service requests for the customers to view, suggest knowledge base solutions, and communicate with customers through notes.

Oracle iSupport provides a secure self-service Web portal your customers can use to get immediate help 24 hours a day, seven days a week from anywhere in the world. Your customers can come online to view the status of their orders with your company, review service agreements, update their contact information, and more. Online they can find answers to many of their questions on their own by searching a knowledge base or by participating in online forums. If they need assistance, customers create service requests and monitor their resolution. Integration with Oracle TeleService makes it possible for an agent to step in and help any customers that cannot resolve problems on their own. Your organization can extend the customer support benefits to your employees by deploying Oracle iSupport as a self-service help desk.

Oracle Field Service

Oracle TeleService agents can review and submit for billing the charges entered by field service technicians using Oracle Field Service.

Oracle Field Service automates the process of dispatching field technicians. The application's Dispatch Center provides a central point from which dispatchers can monitor and control the prioritizing, scheduling, and dispatching of field activities. It combines a graphical overview of planned activities for technicians with a calendar or Gantt view, and it uses maps to show technicians' current locations. A dispatcher can change a resource assignment directly on the Gantt chart simply by dragging and dropping a task symbol from one technician to another. Dispatchers also can access statistical overviews of their organizations in order to assess representatives' performances.

An escalation process alerts dispatchers when an agreed response-time threshold is exceeded. Automated processes guided by customer-specific escalations and tracking help to ensure progress on each task, allowing call takers, dispatchers, and managers to focus on exceptions.

Building on core functionality found in Oracle Inventory, the application's spares management functionality provides the additional logistics and planning features required to effectively manage a field service parts inventory. Using the spares management, a field service organization can automate and streamline all aspects of managing spare parts inventory in the field including ordering, tracking, forecasting and creating reports to name just a few. Oracle Inventory is the only prerequisite product specifically required for implementation of spares management. Oracle Inventory provides the core foundation functionality for the item master, stocking locations, inventory balance tracking, and so on.

Oracle Service Contracts

Oracle Service Contracts automatically applies the terms of a contract to the service request agents are working on and ensures that your service organization meet its contractual obligations.

This application makes it possible for agents and technicians providing customer support, field service, or in-house repair service, to review both warranty and service contract details with a customer. Contract details available may include coverage schedules, response and resolution times by severity, preferred resources, billing rates for labor, relevant discount provisions, and expenses for each type of service on offer.

Oracle Service Contracts not only makes the provisions available for review, but it supports the billing process by pushing, labor, materials, and expenses incurred to TeleService's Charges module, which consolidates the information into a single charge with multiple lines. Before the customer is charged, Service Contracts guides the application of customer entitlements to the charges so that discounts and labor rates are applied accurately in calculating the final charge.

Oracle Advanced Inbound

It is this application that makes it possible for Oracle TeleService to assign a call to an agent most qualified and available to handle the call and to display information about a caller.

Oracle Advanced Inbound is designed to channel a customer call to the right call-center agent simultaneously reducing expenses and increasing customer satisfaction.

Oracle Advanced Inbound offers Web integration, connectivity to the most popular Integrated Voice Response (IVR) equipment, intelligent routing, screen pops, virtual interaction center, and VoIP support. Oracle Advanced Inbound's easy-to-use rules engine weighs agent skills as well as business rules and data to make complex routing decisions. Oracle Advanced Inbound provides Oracle TeleSales, Oracle TeleService, and Oracle E-Commerce and Oracle Interaction Center applications with screen-pop support that spans all channels-telephony/IVR, e-mail (in Oracle eMail Center), and the Web (in Oracle iStore and Oracle iSupport).

Oracle eMail Center

The Oracle eMail Center provides Oracle TeleService with the ability to receive and send e-mails. Templates that automatically fill in relevant information about the service request are provided by the Oracle TeleService administrator.

Oracle eMail Center helps businesses manage increasing volumes of e-mail through the use of automated analyses and automatic responses to standard or routine e-mail. Oracle eMail Center offers the ability to analyze the body of the e-mail and its attachments and provide suggested responses for interaction center agents. It matches the general themes of e-mails against a knowledge base of appropriately managed answers (either from previously used responses or responses that are continually updated). The best suggested response could be used to automatically respond to the sender, thereby eliminating the need for agent contact. When an automated response is not appropriate, Oracle eMail Center coupled with Oracle TeleService can route the e-mail to an agent and display a screen pop with customer information. The user interface for Oracle eMail Center contains suggested responses that an e-mail agent can use to respond to the issues in the original e-mail.

Oracle TeleService integration with Oracle eMail Center makes it possible for you to compose an e-mail with the click of a mouse button. Depending on where you launch the Oracle e-mail Center's Compose window, the application automatically fills in the addressees and context about the service request that you are e-mailing about.

The e-mails you send are recorded in Oracle E-Business Suite's Interaction History. This makes it possible for you to review any e-mails sent to a customer about a service request directly from the Service Request window or you can use the extensive full-text search capabilities of the Oracle eMail Center itself to find the e-mail you are looking for.

Oracle Scripting

Oracle Scripting makes it possible for your organization to author scripts that can guide agents through customer interactions.

Oracle Scripting provides call guides, or scripts, for interaction center agents. When agents use Oracle TeleService, scripts guide them through the call flow needed as they interact with the customer. A script leads an agent through appropriate sales and/or troubleshooting queries, prompts for cross-sell and up-sell opportunities at the right time within the context of the call, and provides detailed information to help the agent resolve customer questions. Scripts also help reduce agent-training time in the high-turnover interaction center industry, because they provide simple navigation through complex customer interactions.

Oracle Scripting also includes iSurvey, a module designed to support the collection of data through Web-based surveys.

Oracle Advanced Scheduler

The Oracle Advanced Scheduler, an optional module for Oracle Field Service, makes it possible for agents to schedule field service tasks directly from the Oracle TeleService user interface.

Oracle Depot Repair

Oracle Depot Repair automates and streamlines the in-house repair process providing enterprises with the flexibility to manage multiple types of returns so that a customer does not lose valuable work time while an item is being repaired. It allows repair centers to manage the entire life cycle of repairs including the creation and tracking of repair orders, generation of Return Material Authorizations (RMAs), assignment of repair work orders to the appropriate technicians, capturing/processing the repair activity, shipping repaired/refurbished products to their respective destinations, and then invoicing the customer for the work delivered based on contractual entitlements.

Oracle Order Management

Using Oracle Order Management, an agent can book the order placed through Oracle TeleService and bill the customer for services.

Oracle Order Management provides a complete order to cash solution and enables global order promising integrated to shipment execution.

Oracle Quality

Your organization can set up collection plans in Oracle Quality that capture relevant data as service requests are logged by customer support personnel. Collection plans may capture data related to a customer, product, product line, etc. Your organization can then analyze this data in Oracle Quality to answer questions about common problems faced by users, or products which cause the most problems. The captured data can be exported to perform detailed statistical analyses.

Oracle Enterprise Asset Management

Agents can create service requests for work orders of internal assets tracked in Oracle Enterprise Asset Management (eAM).

Oracle eAM specializes in maintaining internal assets using a preventive maintenance schedule.

Oracle Collections

Oracle Collections makes it possible for agents to manage invoices and payments for customer accounts from the Contact Center.

Oracle Collections enables payments or promises to pay, and can be used to resolve delinquency issues at the customer, account, bill-to, or transaction level.

Oracle TeleSales

Oracle Telesales makes it possible for agents to send physical or electronic collateral to customers from the Contact Center.

Oracle TeleSales manages the entire sales cycle, from marketing to booking orders.

2

Searching and Displaying Customer Information

If you wish to update customer information, you must first display the customer record in the Contact Center. You must also perform a search before you create a new customer record to ensure that you are not creating a duplicate.

This chapter explains how to search for and display information about your customers. It covers:

- Displaying Customer and Contact Information
- Displaying Customer Information From a Service Request
- Displaying Customers Automatically Via Inbound Telephony
- Displaying Customers and Contacts Using the Lists of Values
- Searching for Customers Using Service Keys and the Customer Search Window
- Searching for Customers Using Unique Identifiers or Service Keys
- Searching for Customers Using Multiple Search Criteria
- Searching for Customers Using Ranges of Values and Other Complex Criteria
- Setting Defaults for Searches

2.1 Displaying Customer and Contact Information

This topic covers the multiple ways of displaying customer and contact information in the Contact Center. Which method you use depends on where you are in the application and what information you know about the customer. If you know information that uniquely identifies the customer, such as the customer number, a phone number, or an account number, then you can display the customer record

with one entry. At other times you must use the Customer Search window. If you are viewing a customer's service request in the Service Request window, then displaying customer information is as simple as clicking the Contact Center button in the toolbar.

This topic covers:

- Displaying Customer Information From a Service Request on page 2-2
- Displaying Customers Automatically Via Telephony Integration on page 2-2
- Displaying Customers and Contacts Using Lists Of Values on page 2-2

2.1.1 Displaying Customer Information From a Service Request

If you are viewing a service request, you can display customer information in the Contact Center by clicking the Contact Center button in the toolbar of the Service Request window.

2.1.2 Displaying Customers Automatically Via Inbound Telephony

If your implementation of Oracle Sales for Communications is telephony enabled and you receive a call from a customer, then the application automatically displays customer and contact information if the available caller information identifies a unique record.

If the application finds multiple matches based on the information the caller has provided, then you must select the appropriate customer or contact you wish to view from a list.

If your implementation is not telephony enabled or the application does not find a match automatically, then you must search for possible matching customer records by using the Customer Search Window or by using the Lists of Values (LOVs) in the Contact Center.

> **Note:** You cannot use the standard Oracle Forms query by example method for customer searches in this application.

2.1.3 Displaying Customers and Contacts Using the Lists of Values

Use the Lists of Values (LOVs) in the Contact Center to display customers and contacts if you know information that uniquely identifies the customer, such as the

customer number, account number, URL, or phone number. You can also use the lists of values to search for a customer record if your search is not likely to yield a large number of results.

> **Note:** The Contact Center header does not support combination searches using multiple search criteria.
>
> You can use any field as an entry point. The list of values contains information about the customer name, address, phone number, which help you to identify the customer.
>
> If you want to do a combination search you must use the Customer Search window, see:
>
> - Searching for Customers Using Multiple Search Criteria on page 2-7

To display a customer and contact using lists of values:

1. Navigate to the Contact Center.

2. If you know information that uniquely identifies the customer, such as the customer number, account number, or phone number, then you can display the customer record by entering that information in the Contact Center header using a list of values.

> **Note:** If you select a phone number and customer information is not populated automatically, it could mean that the phone number is used by multiple customers. You will be prompted with a list of values with customers that match the search criteria.
>
> If there is no match then the application indicates, no record found.

3. If you do not know information that uniquely identifies the customer, then:

   a. In the Customer Region, select the type of customer you wish to display from the Type drop-down list:

      * **Organization**: If your customer is a business or an organization.

      * **Person**: If your customer is an individual consumer

      b. If you know the country where the customer's identifying address is located, then enter it using the Country LOV. This restricts your search to customers in that country.

      c. Use the Name LOV to enter the organization's or person's name.

4. If you wish to display contact information, then use the lists of values in the Contact region to enter the contact.

> **Note:** In a business-to-business model agents will typically identify contacts. However, this is not the case in a business-to-consumer model.

2.2 Searching for Customers Using Service Keys and the Customer Search Window

You can search for customers and contacts from different points within the Contact Center. This flexibility helps to quickly identify callers in cases where telephony is not enabled or the IVR did not return any matches to the information entered.

The Contact Center supports both quick searches using unique identifiers or Service Keys, as well as more complex searches using attributes such as contact last name, city, and e-mail address.

You can search for customers:

1. Using a unique customer identifier called a Service Key, which enables you to do a quick search with an identifier such as an order number or a contract number provided by the customer. You can perform a quick search within the Contact Center header or within the Basic tab of the Customer Search window.

> **Note:** Service Key searches do not support wild cards nor is a list of values available. This type of search should be used in situations when the customer provides specific information such as an order number.

The following is a list of the Service Keys that you can select as unique customer identifiers:

- Contract Number

- Instance Name

- Invoice Number

- Order Number

- RMA Number

- Social Security Number

- Serial Number

- Service Request Number

- System

- Tag Number

> **Note:** If you use the Service Request Number as the Service Key, both the contact and customer information appear. With all other Service Keys only the customer information appears.

2. Using multiple search criteria within the Customer Search window.

The Customer Search window is available by clicking Find (the flashlight icon) in the toolbar. This window supports a basic attribute search as well as a more complex attribute search using operators and logical expressions.

You can search the Customer Search window as follows:

- Using a combination of customer attributes including name, phone, and address (Basic tab).

.

> **Note:** The Search By and the attribute searches cannot be combined.

Any attribute search criteria you enter on the Basic tab is used together in combination in your search (the logical AND operator). This means that if you search for a customer using the First Name and Address fields, for

example, your search returns only those customers who have both that first name and that same address.

> **Note:** The Basic tab contains folder functionality with hidden attributes, which makes the set of searchable attributes identical between the Basic and Advanced tabs.

■ Using a combination of customer attributes combined in logical expressions (Advanced tab)

This type of search lets you find customers within a certain range of values or with multiple logical operators. You can search for customers within a range of postal codes, for example, or for customers with a particular last name or a particular address.

> **Note:** Service Key searches are not available in the Advanced tab.

2.2.1 Searching for Customers Using Unique Identifiers or Service Keys

Use this procedure to search for customers using a unique identifier such as a customer number or a product serial number.

To search for customers using unique identifiers or Service Keys:

1. Navigate to the Contact Center header.

2. Select the search criteria from the Search By drop-down list. For Example, select the Order Number value.

3. Enter the value you wish to search for; for example, enter an order number.

> **Note:** Search By values must entered in full, partial searches are not supported.

4. Click Search.

> **Note:** If a relationship plan exists, you may see the Customer
> Relationships Actions alert. You may review this list or you may
> choose to review the list later.

The customer information appears in the Contact Center header and the
summary information appears in the tab associated with the identifier. In
addition, the identifier used in the Search By field defaults into the Filter Value
within the tab. For example, if you search using the Order Number identifier,
the Orders tab shows the summary information, and the Filter By value within
Orders tab defaults to Order Number.

> **Note:** If you use the Service Request Number as the Service Key,
> both the contact and customer information appear. With all other
> Service Keys only the customer information appears.

2.2.2 Searching for Customers Using Multiple Search Criteria

Use this procedure to search for customers and contacts using a combination of
customer attributes including name, phone, and address.

> **Note:** The Search By and the attribute searches cannot be
> combined.

To search for customers using multiple search criteria:

1. Click Find (the flashlight icon) in the toolbar.

   The Customer Search window appears.

2. Select the Basic tab.

3. Enter one or more customer attributes you wish to search for. Use the (%)
   percent sign to indicate any missing characters.

   - If you are searching for a business or an organization by name, enter a full
     or partial name in the Organization field.

   - If you are searching for a customer who is a consumer, then make entries in
     the First Name and Last Name fields in the Customer region.

> **Note:** If you wish to search for a contact using a first and last name, you can use the Contact Full Name field.
>
> Contact Full Name does not support the use of middle names. For example, you can search for Regina Smith, but not Regina Frances Smith.
>
> This is also true if the context is passed to the Advanced tab.

- If you are searching for a contact at an organization, then enter the contact's name in the Contact region and, optionally, the name of the organization in the Organization field.

> **Note:** Searching for a person using the Contact and Customer regions yields different results. Entering the name in the Customer region, finds only that individual's personal record as a consumer (party of Person.) Searching for that same person using the Contact region, finds the same personal record and also all of the relationships that individual has with any organizations or individuals in the database.

4. Click Search.

5. If only one customer fits your search criteria, the customer information is automatically displayed in the Contact Center.

6. If multiple customers are found, then:

   a. The results of your search appear in the Results region.

   > **Note:** You can sort the results, if necessary, by clicking on different column headings.

   b. If you find the customer you are looking for among the results, then select the record and click OK to display the customer information in the Contact Center where you can make your modifications.

   c. If the search does not return the correct result, select the Advanced tab to conduct a more complex search, or clear the search window by clicking

Clear and then revise your search criteria. If you still cannot find the customer you can create a new customer record by clicking Create.

Note: If you enter search criteria in the Basic tab and then you decide to use the Advanced tab for more complex searching, the context is passed to the Advanced tab. In other words, the search criteria defaults into the Advanced tab and you do not need to re-enter the search criteria.

2.2.3 Searching for Customers Using Ranges of Values and Other Complex Criteria

Use this procedure to search for customers using a range of values or complex logical expressions.

Note: The Advanced search is intended for use by power users who are skilled at SQL and want a more powerful tool for searching.

This tab is typically not used by agents.

To search for customers using complex search criteria:

1. Click Find (the flashlight icon) in the toolbar.

   The Customer Search window appears.

1. Select the Advanced tab.

2. Enter one or more logical expressions for your search:

   a. Select an open parenthesis from the first drop-down list.

   b. Select the field you wish to search from the Attribute drop-down list.

   c. Select the Condition value from the drop-down list.

   d. Type in or select the value using the Value LOV.

   e. Select the closed parenthesis.

   f. Select the logical operator if you are entering multiple search criteria.

      For example, if you wish to search contacts with the last name Lee and a first name that begins with either B or W, then your expression will look like this:

> (Contact Last Name = LEE) AND
>
> (Contact First Name Starts with B OR
>
> Contact First Name Starts with W)

> **Note:** If you are entering multiple search criteria, you must select the New button (plus icon) in the toolbar to add an additional line.
>
> If you are entering just one search criteria, you can omit the parentheses and logical operator.

3. Click Search.

4. If only one customer fits your search criteria, the customer information is automatically displayed in the Contact Center.

5. If multiple customers are found, then:

   a. The results of your search appear in the Results region.

   > **Note:** You can sort the results, if necessary, by clicking on different column headings.

   b. If you find the customer you are looking for among the results, then select the record and click OK to display the customer information in the Contact Center where you can make your modifications.

   c. If the search does not return the correct result, then you can either clear the search window by clicking Clear, or create a new customer record by clicking Create.

2.2.4 Setting Defaults for Searches

To speed up searches for customer information using the Customer Search Window, administrators can:

- Set Customer Search window to appear by default whenever you navigate to the Contact Center by setting the profile Customer Care: Display Customer Search Window by Default to Y.

The Customer Search window will appear only when you first open the Contact Center form.

- Specify which of the tabs (Basic or Advanced) in the Customer Search Window will appear by default by setting Customer Care: Default Tab in Customer Search Window.

- Specify the default Service Key in the Search By drop-down list in the Contact Center header using the profile option Customer Care: Default Contact Center Service Key.

- Set the default tabs to display when a user selects a specific Service Key:

    - Customer Care: Default Tab for Service Request Number Service Key

    - Customer Care: Default Tab for Order Number Service Key

    - Customer Care: Default Tab for Invoice Number Service Key

    - Customer Care: Default Tab for Contract Number Service Key

    - Customer Care: Default Tab for Serial Number Service Key

    - Customer Care: Default Tab for Tag Number Service Key

    - Customer Care: Default Tab for System Service Key

    - Customer Care: Default Tab for RMA Number Service Key

    - Customer Care: Default Tab for Instance Name Service Key

    - Customer Care: Default Tab for Social Security Number Service Key

- Specify whether customer searches in the Contact Center are limited by default to a specific country by setting the profile option Customer Care: Restrict Searches to a Specific Country.

- If necessary, change the name of the search identifier using the following lookup: Customer Care: Default Contact Center Service Key Lookup.

3

Managing Customer Records

This chapter explains how to create and update customer records, including addresses, phone numbers, and other contact points. The customers you can manage include consumers, businesses, and even internal organizations. It covers:

- Viewing Key Information About a Customer Using the Dashboard

- Updating Customer Addresses and Contact Points

- Removing an Individual from the List of Contacts for a Customer

- Creating a New Customer

- Entering Details About a Customer

- Removing a Customer Record from Use

- Restricting Contacts

- Entering Interests for an Organization

- Entering Employment, Education, and Other Personal Details

- Capturing Customer Relationships

- Managing Customer Accounts

- Viewing a Customer's Accounts

- Making a Customer Account Inactive

- Creating a New Account for a Customer

- Updating and Viewing Details of a Customer's Account

- Managing a Customer's Account Details in Oracle TeleService

- Granting Contacts Access to Account Information

- Selecting a Billing or a Shipping Address for an Account

- Creating a New Relationship Between Accounts

3.1 Viewing Key Information About a Customer Using the Dashboard

The Dashboard tab of the Contact Center window provides you with a summary of important customer information, such as the number of escalated service requests or expiring contracts, and permits you to view the individual records being summarized.

Prerequisites

The dashboard must be set up by the administrator. See the Setting Up Customer Profiles section in the *Oracle TeleService Implementation Guide*.

To view key information about a customer:

1. Display the customer in the Contact Center.

2. Select the Dashboard tab.

3. Select Customer from the View Details For drop-down list depending on whether or not you wish to restrict the dashboard View Details For the contact or customer.

   By selecting customer from the list and checking the View By account check box, you can view the account level information for a particular customer.

   The Last Refresh Date field tells you when the data you view was last refreshed.

4. You can click Refresh to display the latest information on the Dashboard tab.

5. A Yes value in the Critical field indicates the customer is critical. If you wish to make a customer critical or remove the critical designation, you can do so by following procedures described in the Managing Critical Customers chapter.

   By default, the application flags any customer as critical if that customer has five or more open service requests.

   Your administrator can change the criteria for flagging a customer as critical by modifying the seeded Critical Customers profile or by creating a new one. A profile can be associated with this flag via the system profile option Customer Care: Critical Customer Check. See Setting Up Customer Profiles in the *Oracle TeleService Implementation Guide*.

6. You can view details of any of the summarized information by either:

- Selecting an item and clicking View Details.

- Double-clicking on the item.

The application displays the Drilldown List window listing all of the individual items. For example, double-clicking on the Accepted Tasks item displays a list of accepted tasks for this customer.

7. Double-clicking on any item in the list displays the item. For example, double-clicking on a task, displays the task in the Tasks window.

3.2 Updating Customer Addresses and Contact Points

You can use the Contact Center to enter and update the address and contact points used by the entire Oracle E-Business Suite of applications. This topic covers:

- Updating a Customer's Identifying Address and Contact Points on page 3-4

  Use this procedure to update the main customer address and contact information which appear in the Contact Center header.

- Selecting a Different Address as the Identifying Address for a Customer on page 3-6

  Follow this procedure if you wish to select a different customer address as the identifying address.

- Adding a New Address and Site for a Customer on page 3-7

  Follow this procedure to add a new address. Each address you add automatically becomes a new site for the customer.

- Specifying Uses Of An Address on page 3-8.

  A single address can have many uses. Follow this procedure to indicate an address is used as a billing and shipping address, for example.

- Indicating a Primary Address for a Particular Use on page 3-9

  If a customer has many addresses for a particular use, then follow this procedure to indicate the primary address for that use.

  For example, if a customer has many billing addresses, you can select which of the addresses is used as the primary billing address. If you do not specify an address for a particular use, the application uses the first address as the default.

- Adding Contact Points for a Customer on page 3-10

Use this procedure to enter phone numbers, e-mail addresses, and other contact information for a customer.

- Adding Contact Points for a Customer Site on page 3-11

  A customer site may have its own independent phone or fax number. Follow this procedure to enter a phone information specific to a customer site.

3.2.1 Updating a Customer's Identifying Address and Primary Contact Points

Use this procedure to update a customer's existing identifying address and primary contact points. A customer can have many addresses, phone numbers, and e-mail addresses, but only one address, phone number, and e-mail address appear by default in the Contact Center and in the interfaces of other Oracle E-Business Suite applications.

This main address is called the customer's identifying address. The contact points are the customer's primary contact points.

> **Note:** You can only use this procedure to modify the existing identifying information. If you wish to create new addresses or contact points or specify other addresses and contact points as the identifying information, then you must use the tabs of the Contact Center.

To modify identifying address and primary contact information:

1. Display the customer in the Contact Center.

2. Click Edit in the Customer region.

   The Edit Customer window appears displaying the same customer information which appears in the Customer region of the Contact Center.

   You can make changes to all the information displayed except the Party number and Account number fields, which are disabled.

Note: It is recommended that you use the Edit function in the Customer region to make only minor updates to the identifying address, such as correcting spelling errors.

If you wish to complete a change of address for a contact or perform any major updates to the address, you should end date the current address in the Addresses tab, and create a new address.

---

3. If you wish to modify the identifying address, then:

   a. Make sure the correct country is specified in the Country field.

   b. Click on the address in the Address field.

   The Address window appears.

   Note: The address appears in a format specific to the country selected. The formats are set up by your administrator.

   ---

   c. Modify the address.

   d. Click **OK**.

4. If you wish to modify the primary phone number, then:

   a. Enter the phone number as in the Phone fields.

   b. Select the phone type from the Type drop-down list.

5. If you wish to modify the primary e-mail address, then make your modification in the Email field.

   Note: Your customer may have more than one e-mail address and phone number already entered as part of their record. This field shows only the e-mail address and phone designated as primary in the Contact Points tab of the Contact Center. If you are not sure what e-mail addresses and phone numbers are entered for your customer, please use the Contacts Points tab instead to avoid duplication. See Adding Contact Points for a Customer on page 3-10 for details.

   ---

6. Click Save.

Clicking **Reset** before you save returns the information back to the original values.

3.2.2 Selecting an Identifying Address

Use the Identifying Address window to select the main address for either:

- A customer
- A customer contact

3.2.3 Selecting an Identifying Address for a Customer

You can select any existing address as the identifying address for a customer. A customer can have many addresses, but only one identifying address which appears by default whenever agents display the customer record. Use this procedure to select an existing address as the Identifying Address.

Prerequisites

You must create an address before you can select it as the identifying address. See Adding a New Address and Site for a Customer on page 3-7.

To select an address as the identifying address:

1. Display the customer in the Contact Center.

2. Select the Addresses tab.

3. From the View Details For drop-down box in the Contact Center header, select Customer: <customer name>.

4. Click Identifying Address.

    The Identifying Address window appears.

5. Click Details (the button to the right of the Address field identified with an ellipsis).

    The Address Search window appears.

6. Search for the address you wish to use and select it.

7. Click OK.

    If you do not find the address you wish to use as the identifying address, then add the address first by following the procedure outlined in Adding a New Address and Site for a Customer on page 3-7.

8. Click Yes to indicate that you wish to save the changes you have made.

3.2.4 Adding a New Address and Site for a Customer

Use this procedure to add a new address for a customer. When you add an address you automatically create a new site for the customer. Each address and site you create can be used for multiple purposes. For example, a shipping address can be used both for shipping and for billing.

To add a new address and site for a customer:

1. Display the customer in the Contact Center.

2. Select the Addresses tab.

3. From the View Details For drop-down box in the Contact Center header, select Customer: <customer name>.

4. If no empty address record exists, then click New in the toolbar to create one.

5. Select the country for the address using the Address LOV.

6. Click on the Address field.

   The Address window appears.

   > **Note:** The address format changes depending on the country. The address formats are set up by your administrator.

7. Enter an Address.

8. Click OK.

9. Click the Save icon in the toolbar.

10. Specify the different uses for this address in the Site Usages region. See Specifying Uses Of An Address on page 3-8 for details.

11. Optionally, in the Primary Sites region, you can specify that this address is the primary address for a specific use. See Indicating a Primary Address for a Particular Use on page 3-9.

12. If you wish to select the address you have just created as the identifying address for the customer, then:

> **Note:** The first address an agent enters for a customer automatically becomes the identifying address.

    a. Click **Identifying Address**.

    The Identifying Address window appears.

    b. Click Details (the button to the right of the Address field identified with an ellipsis).

    The Address search window appears.

    c. Search for the address to become the new identifying address.

    d. Click OK.

13. Click Save.

3.2.5 Specifying Uses for an Address

A single customer address and site can have multiple uses. For example, the same address can be both the shipping and billing address as well the address where the equipment to be serviced resides. Use this procedure to specify the different uses of an address.

Prerequisites
You must first add the address to the customer record.

To specify different uses for an address:

1. Display the customer in the Contact Center.

2. Select the Addresses tab.

3. From the View Details For drop-down box in the Contact Center header, select Customer: <customer name>.

4. Select the address.

5. Select each use for this address using the Usage LOV in the Site Usages region. You can specify additional usages, by using the New icon in the toolbar, if required.

> **Note:** Specifying a billing address for a customer does not automatically enable this address to be used by Oracle Receivable's as a a billing address. For this address to be used for billing, you must associate it to a customer account.
>
> Oracle TeleService creates this association for you automatically when you use this address as the billing address for a customer charge in the Charges tab of the Service Request window. Otherwise, you must associate the customer address with that account in the Customer Account Details window, which you can launch from the Accounts tab within the Contact Center. For information on how to create the association, see Selecting a Billing or a Shipping Address for an Account on page 3-25 for details.

6. Click Save.

7. If you have entered multiple addresses for a particular use, you are now ready to specify which one is the primary address for that use. See Indicating a Primary Address for a Particular Use on page 3-9.

3.2.6 Indicating a Primary Address for a Particular Use

A customer may have multiple addresses for the same use. Use this procedure to specify which of these is primary.

For example, a customer with ten offices may have a separate billing address for each site. Using this procedure, you can specify which of these billing addresses is the primary address that appears on invoices and other documents by default.

> **Note:** If you do not specify an address for a particular use, the application uses the first address as the default.

Prerequisites

You must specify uses of an address in the Site Usages region before you can specify which of these addresses are primary.

To indicate a primary address for a particular use:

1. Display the customer in the Contact Center.

2. Select the Addresses tab.

3. From the View Details For drop-down box in the Contact Center header, select Customer: <customer name>.

4. In the Primary Sites region, use the Usage LOV to select the use.

5. Use the Address LOV to select the address you wish to specify as the primary address for this use.

6. Click Save.

3.2.7 Adding Contact Points for a Customer

Use this procedure to add the contact points for a customer and to indicate which of these contact points is primary. A customer can have multiple phone numbers, e-mail addresses, and Web sites. Specifying a contact point as primary determines what agents see when they bring up the customer record.

If you wish to add contact points specific to an employee of a customer or a contact working on behalf of a consumer, then add the contact points to the contact instead. See Adding Contact Points for a Contact on page 8-9.

To add contact points for a customer:

1. Display the customer in the Contact Center.

2. Select the Contact Points tab.

3. From the View Details For drop-down box in the Contact Center header, select Customer: <customer name>.

4. Select the New icon from the toolbar.

5. Select a contact method from the Contact Method list of values.

   The remaining fields vary depending on the contact method you select.

6. If you selected Phone, then enter the phone number in the fields provided. The Contact Point Value field is for the main phone number and the Ext field is for the phone extension.

7. If you selected Web, then enter the URL in the Contact Point Value field.

8. If you selected Email as the contact method, then enter the e-mail address in the Contact Point Value field.

9. If you selected EDI, then enter the appropriate value in the Contact Point Value field.

10. If you selected Telex, then enter the telex number in the Contact Point Value field.

11. Optionally, enter the best times to use this contact method in the Best Time From and Best Time To fields.

12. If you do not want a contact method to be used, then select the Do Not Contact check box.

13. If you wish to indicate the contact point is primary, then make the following entries in the Primary Contact Point region:

    a. Select the contact method using the Contact Method LOV.

    b. Use the Contact Point Value LOV to select the primary contact point for that contact method.

    c. Click the Save icon in the toolbar.

3.2.8 Adding Contact Points for a Customer Site

Use this procedure to add contact information tied to a specific site rather than to a contact or the company as a whole. You may wish to do so if your organization services equipment installed in a room with its own phone number which is not tied to any specific individual customer contact, for example.

Note: Other agents can view the contact information you enter here only when viewing site information. Whatever you enter here does not appear among the contact points for the customer as a whole. If you want contact information to be more generally visible then enter it instead as a contact point for the customer.

Prerequisites

You must first create the site by adding an address to the customer record.

To add contact points for a customer site:

1. Display the customer in the Contact Center.

2. Select the Addresses tab.

3. From the View Details For drop-down box in the Contact Center header, select Customer: <customer name>.

4. Select the address/site.

5. Click Site Contact Points.

   The Party Site Contact Points window appears.

6. Select a contact method from the Contact Method list of values.

   The remaining fields vary depending on the contact method you select.

7. If you selected Phone, then enter the phone number in the fields provided. The Contact Point Value field is for the main phone number and the Ext field is for the phone extension.

8. If you select Web, then enter the URL.

9. If you select Email as the contact method, then enter the e-mail address in the Contact Point Value field.

10. If you select EDI, then enter the appropriate value in the Contact Point Value field.

11. If you select Telex, enter the telex number in the Contact Point Value field.

12. Optionally, enter the best times to use this contact method in the Best Time From and Best Time To.

13. If you do not want a contact method to be used, then select the Do Not check box.

14. Save your work to return to the Addresses tab.

3.3 Removing an Individual from the List of Contacts for a Customer

Use this procedure to indicate an individual is no longer a contact for a customer. Doing so removes them from the contact List of Values for the customer. It does not remove them from your database.

To remove an individual from the list of contacts for a customer:

1. Display the customer and contact in the Contact Center.

2. Select the Relationship tab.

3. Select the customer from the View Details For drop-down list in the Contact Center header.

4. If you wish to remove an individual from the list of contacts for the customer, then select Inactive from the Status field for every relationship the contact has with the Customer.

5. Click **Save** in the toolbar to save your changes.

3.4 Creating a New Customer

Use this procedure to create a new customer in your database.

To create a new customer:

1. Search for the customer using the Customer Search window to make sure the customer is not already in your database. See Searching for Customers Using Service Keys and the Customer Search Window on page 2-4.

> **Note:** Oracle TeleService does not support fuzzy search, so you may wish to search for any alternate spellings and abbreviations of a customer name to make sure you are not creating a duplicate.

2. Click Create in the Customer region.

3. The Create Customer window appears.

4. Select the type of your customer using the Type drop-down list:

- Person: if you are creating a customer that is a consumer.

- Organization: if your customer is an organization.

5. Optionally, enter an e-mail address and phone number. The entries you make here automatically become the primary contact points for the customer.

6. If you wish to name the site which is automatically created when you enter the customer address, then enter a site name in the Site Name field.

7. Enter the country for your customer address using the Country LOV. This determines the address format.

8. Enter an address for the customer:

a. Click on the address in the Address field.

The Address window appears.

b. Enter the address.

c. Click OK.

9. Select the Create Account check box if you want the application to create an account for this customer.

10. Click Save.

The application displays a note informing you of any new party number and account number that has been created and enters the new customer information in the Customer region of the Contact Center. You are now ready to enter more customer details.

See Entering Details About a Customer on page 3-14.

For information on creating a new contact, see:

Creating a New Contact on page 8-10.

Guidelines

The application automatically generates a Party Number if the administrator sets the profile options HZ: Generate Party Number to Yes. It automatically creates an account if you selected the Account check box and if the administrator set the Oracle Receivables system option AR: Automatic Customer Numbering to Yes.

Please refer to the *Oracle TeleService Implementation Guide* for more information about these profile options.

3.5 Entering Details About a Customer

Use this procedure to enter details about the customer in the Party Information tab of the Contact Center window. The details you enter are different depending on whether your customer is an individual or an organization. For organizations, you enter details such as the number of employees. For consumers, you enter the pronunciation and their language proficiency and employment history.

Prerequisites

You must create a customer before you can enter details.

To enter details about customers:

1. Display the customer in the Contact Center.

2. Select the Party Information tab.

3. Select the customer, Customer: <customer name>, from the View Details For drop-down list.

4. If your customer is an organization, then:

    a. Select the type of customer in the Type region:

    *   Internal for internal organizations

    *   External for external customers

  b.   Enter any details about the customer in the fields provided. The fields include the number of employees, and the SIC code.

  c.   If you wish to classify the organization by its purchasing interests then click Details and follow the procedure for Entering Interests for an Organization on page 3-17.

 5.   If your customer is a consumer, then:

  a.   Select the type of customer in the Type region:

    *   Internal for an employee

    *   External for external customers

  b.   Enter information about the customer in the fields provided. All fields are free-text fields except for Preferred Language, Marital Status, and Residence Status.

  c.   If you wish to enter additional details, such as the customer's interests and educational and employment history, then click Details and follow the procedure for Entering Employment, Education, and Other Personal Details on page 3-18.

 6.   If you wish to restrict contact with the customer, then click Restrict Contact and enter the restrictions. See Restricting Contact with the Customer on page 3-16 for more details.

 7.   Click Save.

3.6 Removing a Customer Record from Use

Use this procedure for removing a customer record from use by making it inactive. This action removes the customer in all lists of values for all new transactions.

> **Note:** Before you remove a customer record from use by making it inactive, be aware of the consequences this may have in other applications. Customer records are visible across the entire Oracle E-Business Suite. Some applications:
>
> - Exclude inactive party records from their user interfaces.
>
> - Prevent users from creating records or business transactions for inactive parties.
>
> Consider these possible consequences before you set a party status to inactive.

To remove a customer record from use:

1. Display the customer in the Contact Center.

2. Select the Party Information tab.

3. Select the customer, Customer: <customer name>, from the View Details For drop-down list.

4. Select Inactive from the Status list of values (LOV).

5. Click **Save**.

3.7 Restricting Contacts

You can use the Contact Restrictions window to:

- Restrict contact with a customer on page 3-16.

- Restrict contacts with a customer contact on page 8-14.

3.7.1 Restricting Contact with a Customer

Use this procedure to restrict contact with a customer. The restrictions you place on phone, e-mail, visits, and other contacts apply through your organization.

If your customer is an organization and you wish to restrict contact with that organization's employees, then you must instead set up restrictions at the individual employee level. Restricting contacts with a customer does not automatically restrict contacts with individuals who are contacts for that customer.

To restrict contacts with a customer:

1. Display the customer and contact in the Contact Center.

2. Select the Party Information tab.

3. Select the customer, Customer: <customer name>, from the View Details For drop-down list.

4. Click Contact Restrictions.

   The Contact Restriction window appears.

5. Select the contact method you wish to restrict using the Contact Method LOV.

6. Enter the start and end dates for the restriction in the From and To fields. If you wish to restrict the contact permanently, then choose an end date far off in the future.

7. Optionally, enter a reason for the restriction using the Reason LOV.

8. Click OK.

9. Click Save.

3.8 Entering Interests for an Organization

Use this procedure to classify the interests of an organization using a classification scheme set up by your administrator.

To enter interests for an organization:

1. Display the customer in the Contact Center.

2. Select the Party Information tab.

3. Click Details.

   The Organization Details window appears displaying any current interests.

4. If you wish to add an interest:

   a. Click New in the toolbar.

   b. Select the interest type using the Interest Type LOV.

   c. Optionally, enter a further classification using the Subinterest type LOVs.

   d. Enter an optional comment.

   e. Click Save on the toolbar.

5. If you wish to change an existing interest, then:

   a. Select the interest you wish to change in the table.

   b. Select a different interest type using the Interest Type LOV.

   c. Optionally, enter a further classification using the Subinterest type LOVs.

   d. Enter an optional comment.

   e. Click Save on the toolbar.

6. When you have completed entering interests, then click **OK**.

3.9 Entering Employment, Education, and Other Personal Details

Use this procedure to enter educational and employment histories and other personal information about consumers. Your organization may track this information for marketing campaigns and other sales activities.

To enter personal customer details:

1. Display the customer in the Contact Center.

2. Select the Party Information tab.

3. Click Details.

   The Person Details window appears.

4. If you wish to add employment history for this customer, then select the Job/Military History tab.

5. If you wish to add educational history, then select the Education tab.

6. If you wish to classify your customer's interests, then select the interests tab.

7. If you wish to add an item then:

   a. Click New in the toolbar.

   b. Make your entries.

   c. Click Save on the toolbar.

8. If you wish to change an item, then:

   a. Select the item you wish to change in the table.

   b. Make your modifications.

    c. Click Save on the toolbar.

9. When you have completed entering personal details, click OK.

3.10 Capturing Customer Relationships

Use this procedure to capture the relationships a customer has with other individuals and organizations.

If your customer is an organization, then you can use this procedure to capture:

- The customer's relationship with other organizations already in your database, for example, that customer A is a competitor of customer B and a subsidiary of customer C.

- The customer's relationships with individuals already in your database, for example, that person A is an employee or CEO of your customer.

If your customer is a consumer, then you can use this procedure to capture:

- Relationships this consumer has with other consumers, for example, that person A is the parent of person B or that person A is a contact for person B.

- Capture that consumer's relationships with organizations they work for or belong to, for example, that person A is an employee of Organization A or a board member of Organization B.

Note: The list of values you use to select the individual or organization for the relationship, includes all of the parties in your database, so make sure that you know the exact name to minimize long searches.

To capture a relationship for a customer

1. Display the customer in the Contact Center.

2. Select the Relationships tab.

3. Select the customer, Customer: <customer name>, from the View Details For drop-down list.

4. If your customer is an organization, then:

    a. Click New in the toolbar (this is the icon with the green plus sign).

    The object field is already populated with the name of your customer.

    b. Use the Subject LOV to select the individual or organization for the relationship. Restrict your search by entering at least a partial name.

    c. Use the Relation LOV to select the relationship type.

    d. If you are entering a person, then you can enter that person's title using the Title LOV.

    e. Enter an end date if you wish this relationship to expire sometime in the future.

5. If your customer is consumer, then:

    a. If no blank record is available, click New in the toolbar (this is the icon with the green plus sign).

    The Subject field is pre-populated with the name of your customer.

    b. Use the Relation LOV to select the relationship type.

    c. Use the Object LOV to select the individual or organization for your customer's relationship. Restrict your search by entering at least a partial name.

> **Note:** The list of objects is restricted by the relationship you have chosen. For example, if you have chosen "Contact of", then you can only select organizations. If you have selected "Child of", then you can only select other persons.

    d. Enter an end date if you wish this relationship to expire sometime in the future.

6. Click Save.

3.11 Managing Customer Accounts

Procedures are available on the following topics:

- Viewing a Customer's Accounts on page 3-21
- Making a Customer Account Inactive on page 3-21
- Creating a New Account for a Customer on page 3-22
- Updating and Viewing Details of a Customer's Account on page 3-23
- Managing a Customer's Account Details in Oracle TeleService on page 3-23

- Granting Contacts Access to Account Information on page 3-24.
- Selecting a Billing or a Shipping Address for an Account on page 3-25
- Creating a New Relationship Between Accounts on page 3-25

3.12 Viewing a Customer's Accounts

Use this procedure to view a customer's accounts.

To view a customer's accounts:

1. Display the customer in the Contact Center.
2. Select the Accounts tab.

   The left side of the tab displays your customer's existing accounts.

   > **Note:**   The Suspension Date and Current Balance fields are being made obsolete and so may not appear in your version of the application.

3. If you wish to view inactive accounts, then select the Inactive check box.

   For details about updating accounts, see Updating and Viewing Details of a Customer's Account on page 3-23.

3.13 Making a Customer Account Inactive

Use this procedure to remove an account from use in all E-Business Suite applications, including Oracle Receivables.

To make a customer's account inactive:

1. Display the customer in the Contact Center.
2. Select the Accounts tab.

   The existing accounts are displayed in the table on the left section of the tab.

3. Select the account you wish to inactivate.
4. Click Customer Standard.

   The Customers - Standard window appears.

5. Deselect the Active check box in the Customers - Standard header.

6. Click Save.

7. Right click the Account in the Accounts window.

8. Select Refresh.

9. Select the Show Inactive check box.

10. Select the account that you inactivated.

11. The Account Status field is Inactive.

3.14 Creating a New Account for a Customer

Use this procedure to create a new customer account. The application automatically creates the account number. If you are using Oracle financial applications, the account number is the same as the customer number in Oracle Receivables.

> **Note:**   When you are creating a new customer record, you can instead have the application automatically create an account for your customer by selecting the Create Account check box.

To create a new account for a customer:

1. Display the customer in the Contact Center.

2. Select the Accounts tab.

   The existing accounts are displayed in the table on the left section of the tab.

3. Click New.

4. Enter an account name in the Account Name field.

5. Click Save.

   The application creates the account number automatically. This number is also the Customer Number used in Oracle financial applications.

   You are now ready to enter details about the account according to the procedure outlined in Updating and Viewing Details of a Customer's Account on page 3-23.

3.15 Updating and Viewing Details of a Customer's Account

Use this procedure to view and update details of a customer's account.

To view and update the details of a customer's account:

1. Display the customer in the Contact Center.

2. Select the Accounts tab.

   The tab displays the existing accounts in a table on the left.

3. Select the account in the table.

4. Click the Customer Standard button.

   The Customers Standard window appears. You can use this window to rename an account or to make an account inactive, for example.

5. You can also:

   ■ View and update the account in Oracle Receivables by clicking Customer Standard. This option is available to you only if your organization is using Oracle Receivables and you have been assigned the appropriate Oracle Receivables responsibility.

   ■ Manage the basic details, such as account relationships, contacts, and account billing and shipping addresses, by clicking Details. See Managing a Customer's Account Details in Oracle TeleService on page 3-23.

3.16 Managing a Customer's Account Details in Oracle TeleService

While you must use financial applications to manage accounts, Oracle TeleService makes it possible for you to view and update some of the basic details about a customer's account.

Prerequisites

Familiarity with Oracle Receivables terminology and your organization's accounting procedures.

To view and update details of a customer's account:

1. Display the customer in the Contact Center.

2. Select the Accounts tab.

   The existing accounts are displayed in the table on the left section of the tab.

3. Select the account in the table.

4. Click Details.

   Customer Account Details window appears.

5. You can:

   - View the credit status of the account on the Credit tab.

   - Grant customer contacts access to account information on the Roles tab. See Granting Contacts Access to Account Information on page 3-24.

   - View any suspensions for the account on the Suspensions tab.

   - Select a customer address as the billing or shipping address for the account on the Sites tab. See Selecting a Billing or a Shipping Address for an Account on page 3-25.

   - View and create new relationships between accounts on the Relationships tab. See Creating a New Relationship Between Accounts on page 3-25.

3.17 Granting Contacts Access to Account Information

Use this procedure to specify who can access a customer account. By selecting an individual as a contact for an account, you make it possible for them to view account information on the Web in Oracle iSupport, for example.

Prerequisites

The persons you wish to grant access to the account must already have a relationship with the customer.

To grant contacts access to account information:

1. Display the account in the Customer Account Details window by clicking **Details** on the Accounts tab of the Contact Center. (See Managing a Customer's Account Details in Oracle TeleService on page 3-23 for details.)

2. Select the Roles tab.

   The table displays existing customer contacts with relationships to the account.

3. Click New.

4. Select the contact using the Party Name list of values (LOV).

5. Select the relationship this individual will have to this account using the Role Type LOV.

6. Select Active from the Role Status LOV.

7. Optionally select the Primary check box to indicate this is a primary contact for this account.

8. Click Save on the toolbar.

3.18 Selecting a Billing or a Shipping Address for an Account

Use this procedure to make an existing customer address available as a billing or shipping address for an account in Oracle financial applications. If you are billing a customer for work performed on a service request, then the application creates this link for you automatically. Until you do use a specific address for a transaction, however, that address remains unavailable for use in financial applications unless you create a link using the procedure below.

Prerequisites

You must create the customer address first. See Adding a New Address and Site for a Customer on page 3-7.

To select a billing or a shipping address for an account:

1. Display the account in the Customer Account Details window by clicking Details on the Accounts tab of the Contact Center. (See Managing a Customer's Account Details in Oracle TeleService on page 3-23 for details.)

2. Select the Sites tab.

3. Click New.

4. If the address has a site name, then select it using the Site Name list of values (LOV).

5. If the address does not have a site name, then you can search for it using the Address LOV.

6. Using the Site Use LOV, select the use. For example, if you wish this address to be the billing address for the account, then select Bill To.

7. Click **Save**.

3.19 Creating a New Relationship Between Accounts

Use this procedure to create a relationship between two accounts, if, for example, one account is to be used as payment for a second account.

To create a relationship between two accounts:

1. Display the first account in the Customer Account Details window by clicking Details on the Accounts tab of the Contact Center. (See Managing a Customer's Account Details in Oracle TeleService on page 3-23 for details.)

2. Select the Relationships tab.

   The tab displays existing relationships with other accounts in a table.

3. Click New.

4. Use the list of values in either the Account Name or Account Number fields to enter the account you wish to relate.

5. Select the status of the account.

6. If you wish the new link to be reciprocal, select the Reciprocal check box.

7. Click Save.

4

Managing Customer Invoices and Payments

This chapter explains how to manage customer invoices and payments from the Contact Center. It covers:

- About Managing Customer Invoices and Payments

- Viewing a Customer's Invoice and Payment Information

- Entering a Customer's Payment for an Invoice

- Adjusting Charges

- Handling Disputed Charges

This functionality is enabled through Oracle Collections. Refer to the *Oracle Collections User Guide*, for detailed procedures on managing payment and invoice windows.

4.1 About Managing Customer Invoices and Payments

This group of topics explains how you can manage invoices and payments for the customer account that you select in the Contact Center header.

> **Note:** If you would like to review all invoices for a customer regardless of account, you can blank out the account field in the Contact Center header.

From the Invoices tab you can identify the status of the invoice or launch detail screens to make payments, log disputes, make adjustments, or reverse charges.

If an invoice number is entered in the IVR, Contact Center shows the customer information with the Invoice tab defaulted with the invoice summary displayed in

the left panel and the payment history associated to that invoice in the right panel. If the customer does not have an invoice number, the order number or PO number can be used to filter the list of open invoices for the customer account. The transaction date for the invoice can be used to filter the list of open invoices for the customer account. You can also choose to display the closed invoices in the invoice history list.

From the Invoices tab, you can:

- View a customer's invoice and payment detail information.

  See Viewing a Customer's Invoice and Payment Information on page 4-2.

- Enter a customer's payment for an invoice.

  See Entering a Customer's Payment for an Invoice on page 4-4.

- Make adjustments to charges on an invoice.

  See Adjusting Charges on page 4-5.

- Log a dispute on a customer's behalf.

  See Handling Disputed Charges on page 4-6.

4.2 Viewing a Customer's Invoice and Payment Information

Use this procedure to view a customer's invoice and payment information from the Contact Center.

To search for a customer's invoice and payment information:

1. Display the customer in the Contact Center.

2. Select the Invoices tab.

   > **Note:** If you use the Invoice Number in the Search By field of the Contact Center header, the Invoices tab defaults showing the summary information. The Filter By value within the tab defaults to Invoice Number.

3. Review the summary table. Payments that are associated with an invoice will appear in the Payment Details region when the invoice is selected.

> **Note:** You can also refresh the summary table to show closed invoices or show invoices for a specified date range.

4. To show closed invoices:

   a. Select the Include Closed check box.

   b. Click Refresh.

   The summary table is refreshed and displays active and expired invoices associated with the customer in the Contact Center header.

5. To display invoices for a specified date range:

   a. Enter a date in the From Date field.

   b. Enter a date in the To field.

   c. Click Refresh.

6. You can filter or search for a specific invoice using a unique identifier such as invoice number, order number, or PO number.

   To filter invoice records:

   a. Select a value from the Filter By drop-down list.

   b. Enter a unique value for the filter that you selected, for example, an order number.

   c. Click Refresh.

   The summary table is refreshed and displays information related to the filtering information that you entered.

7. You can launch the Transaction Details window to view invoice details, by selecting the invoice in the summary table and clicking Transaction Details.

   From this window you can view transaction details for the invoice and log a dispute for a customer.

8. If information appears in Payment Details summary region, you can select the Payment Details button to view the payment history.

   The Payment History Details window appears.

4.3 Entering a Customer's Payment for an Invoice

Use this procedure to enter a customer's payment from the Contact Center.

To enter a customer's payment for an invoice:

1. Display the customer in the Contact Center.

2. Select the Invoices tab.

3. You can launch the Processing Payment window to pay invoices and review payment information, by selecting the invoice in the summary table and clicking Payment Processing.

4. Enter a Payment Amount.

5. Enter the payment methodology in the Payment Information region, by selecting the Bank Transfers, Credit Card, or Promise Amounts tabs.

   For example, if the customer calls to make a payment on an invoice, one of the ways you can accept payment is by credit card.

   To accept payment by credit card:

   a. Select either the Pay in full check boxes for each line item you wish to process or select the Pay All check box to process payments for all line items.

   b. If the customer wants to pay a partial amount, then enter the payment amount for that item.

   c. Choose the Credit Card tab and enter the following information:

      – Credit card type

      – Financial institution name

      – Credit card number

      – Cardholder name

      – Expiration date

      – Enter a note about the payment.

   d. Click Submit.

   For more information on entering specific payment details refer to the *Oracle Collections User Guide.*

4.4 Adjusting Charges

If during the course of a call you determine that an adjustment should be made to an invoice, you can make an adjustment from the Invoices tab in the Contact Center by launching the Installment Details window. For example, if a customer underpays an invoice by less than a dollar, you may decide to write-off that amount.

Use this procedure to adjust charges from the Contact Center.

To adjust charges:

1. Display the customer in the Contact Center.

2. Select the Invoices tab.

3. Select Adjustment Processing.

   The Installment Detail window appears.

4. To process adjustments:

   a. Complete the following information in the Adjustment Processing region:

   – Select an Activity Name, such as Write-Off.

   – Select an Activity Type, such as an invoice write-off or line.

   – Enter an amount or accept the defaulted amount in the Amount field.

   – Select an adjustment date from the Date field.

   – Select a reason from the Reason LOV.

   – Select a status from the Status LOV.

   – If you enter Line as the Activity name, select the Includes Tax check box if you want the adjustment to calculate tax adjustments.

   – If you enter Line as the Activity name, enter a Line Number

   b. Click Adjustment.

   The Installment Review region shows the pending or approved adjustment.

For more information on adjusting charges refer to the *Oracle Collections User Guide*.

4.5 Handling Disputed Charges

If the customer calls to dispute invoice charges, you may want to log a dispute on his behalf to be researched following the call. For example, your company may give customers a discount for items that ship late as part of a guaranteed delivery program.

Use this procedure to handle disputed charges from the Contact Center.

To handle disputed charges:

1. Display the customer in the Contact Center.

2. Select the Invoices tab.

3. Select an invoice in the summary table and click Transaction Details.

   The Transaction Details window appears.

4. To log a dispute:

   a. Select a Dispute Reason from the LOV, such as Late Delivery.

   b. Select Specific Invoice Lines from the Dispute Section LOV.

   c. Select the line item.

   d. Enter a Dispute Percentage for the line item, such as 20%.

      The Dispute Total is calculated from the percentage entered in this field and the transaction line total.

   e. Alternatively, if the customer wants to dispute a section of the invoice, then use the LOV in the Dispute Section field to select a value such as Lines subtotal or Shipping, Tax, or Total.

   f. Enter a description for the dispute in the Note box.

   g. Select Dispute.

      A Note appears with the dispute number.

   h. Click OK to close the Note. The dispute information appears in the Transaction Details window.

      For more information on dispute resolution refer to the *Oracle Collections User Guide*.

5

Managing Customer Orders

This chapter explains how to view and create orders from the Contact Center. It covers:

- About Managing Customer Orders
- Viewing Customer Orders
- Creating Customer Orders

5.1 About Managing Customer Orders

This group of topics explains how you can manage orders for the customer account that you select in the Contact Center header.

> **Note:** If you would like to review all customer orders for a customer regardless of account, you can blank out the account field in the Contact Center header

If an order number is entered in the IVR, Contact Center shows the customer information with the Orders tab defaulted and the order summary displayed. If the customer does not have an order number, the order amount, the item, or a creation date range can be used to filter the list of open orders for the customer account. In addition, the agent can choose to display the closed orders in the order history list.

From the Orders tab, you can:

- Identify the status of an order and access Order Management.

    See Viewing Customer Orders on page 5-2.

- Create a new order.

  See Creating Customer Orders on page 5-3.

5.2 Viewing Customer Orders

Use this procedure to view customer orders from the Contact Center.

To view customer orders:

1. Display the customer in the Contact Center.

2. Select the Orders tab.

   > **Note:** If you use the Order Number identifier in the Search By field of the Contact Center header, the Orders tab defaults showing the summary information. The Filter By value within the tab defaults to Order Number.

3. Review the summary table. Select the order you would like to view.

   > **Note:** You can also refresh the summary table to show closed orders or to show orders for a specified date range.

4. To display closed orders:

   a. Select the Include Closed check box

   b. Click Refresh.

5. To display orders for a specified date range:

   a. Enter a date in the From Date field.

   b. Enter a date in the To field.

   c. Click Refresh.

6. To filter the order information in the summary table by Item, Order Amount, or Order Number:

   a. Select a value from the Filter list By, for example, Order Number.

    b. Enter a unique identifier related the Filter By value you have selected, for example, an order number.

    c. Click Refresh.

       You should see the filtered results within the summary table.

    d. Select the order you would like to view or update.

> **Note:** If you select Order Amount as the filter value, then use the following formats to filter by positive order amounts, 9999.00 or 9999, and the following formats to filter by negative order amounts, -9999.00 or -9999.

7. Click the Details button.

This launches either the Sales Organizer window or the Quick Order Management window, depending on the value the administrator has set in the *OM: Sales Order Form preference* profile.

8. View and update the order. For more information on updating orders refer to the *Oracle Order Management User's Guide*.

9. After you have updated the order in Order Management, click the Save icon in the toolbar.

10. Close the Order Management Window.

11. To view any updates within the Orders tab of the Contact Center click Refresh.

This action will refresh the information displayed in the summary table.

5.3 Creating Customer Orders

Use this procedure to create customer orders from the Contact Center.

To create customer orders:

1. Display the customer in the Contact Center.

2. Select the Orders tab.

3. Click the New button.

This launches either the Sales Order window or the Quick Sales Orders window, depending on the value the administrator has set in the *OM: Sales Order Form preference* profile.

4. Create the order. For more information on creating orders refer to the *Oracle Order Management User's Guide.*

5. After you have created the order in Order Management, click the Save icon in the toolbar.

6. Close the Order Management Window.

7. To view any updates within the Orders tab of the Contact Center click Refresh.

   This action will refresh the information displayed in the summary table.

6

Viewing a Customer's Service Entitlements

This chapter explains how to view customer service entitlements and review coverage from the Contact Center. It covers:

- About Viewing a Customer's Service Entitlements
- Viewing a Summary of a Customer's Service Entitlements
- Viewing Coverage Details

6.1 About Viewing a Customer's Service Entitlements

This group of topics explains how you can access entitlements for the customer account that you select in the Contact Center header.

> **Note:** If you would like to review all contracts for a customer regardless of account, you can blank out the account field in the Contact Center header.

You can view the service entitlements for the customer selected in the Contact Center header where the customer is the authored party for the contract; or you can search for service entitlements for items that you own, but are actually covered by another company's contract.

If a contract number is entered in the IVR, Contact Center shows the customer information with the Contracts tab defaulted and the contract lines displayed in the left panel, and the covered levels associated to that contract line in the right panel. If the customer does not have a contract number, the account number, item, party, product, serial, number, site, and system can be used to filter the list of active contracts for the customer account.

From the Contracts tab you can:

- Review a a summary of customer's service entitlements.

  See Viewing a Summary of a Customer's Service Entitlements on page 6-2.

- Launch the Coverage Details screen to view the resolution and response times, preferred technicians, and billing information.

  See Viewing Coverage Details on page 6-3

6.2 Viewing a Summary of a Customer's Service Entitlements

Use this procedure to view a summary of a customer's service entitlements from the Contact Center.

To view a summary of a customer's service entitlements:

1. Display the customer in the Contact Center.

2. Select the Contracts tab.

Note 1: If you use the Contract Number identifier in the Search By field of the Contact Center header, the Contracts tab defaults showing the summary information. The Filter By value within the tab defaults to Contract Number.

Note 2: If you use an account number the Filter By value within the tab defaults to Account Number and shows all active contracts associated with that account.

---

3. Review the summary table.

4. Select the contract you would like to view.

   The Covered Levels displayed in the right panel correspond to the contract selected in the left panel.

Note: You can also refresh the summary table to show ineligible contracts or to show contracts for a specified date range.

---

5. To display ineligible contracts:

   a. Select the Include Ineligible Contracts check box

   b. Click Refresh.

6. To display contracts for a specified date range:

   a. Enter a date in the From Date field.

   b. Enter a date in the To field.

   c. Click Refresh.

7. To filter the contract information in the summary table by Contract Number, Account Number, Item, Party, Product, Serial, Number, Site, and System:

   a. Deselect the Authored check box.

   By default the Authored check box shows as selected within the tab.

   Note: When you use an attribute, such as an item to search for service entitlements, the authored check box should be deselected. This ensures the search results include all contract lines that cover the item, whether authored by the customer or not.

   ---

   b. Select a value from the Filter list By, for example, Account Number.

   c. Enter a unique identifier related the Filter By value you have selected, for example, an account number.

   d. Click Refresh.

   You should see the filtered results within the summary table.

6.3 Viewing Coverage Details

Use this procedure to view coverage details from the Contact Center.

To view coverage details:

1. Display the customer in the Contact Center.

2. Select the Contracts tab.

> **Note 1:** If you use the Contract Number identifier in the Search By field of the Contact Center header, the Contracts tab defaults showing the summary information. The Filter By value within the tab defaults to Contract Number.

> **Note 2:** If you use an account number the Filter By value within the tab defaults to Account Number and shows all active contracts associated with that account.

3. Review the summary table.

4. Select the contract you would like to view.

   The Covered Levels displayed in the right panel correspond to the contract selected in the left panel. Examples of covered levels include party, account number, item instance, site, system, and item.

5. Click Coverage Details.

   This launches the Service Contracts Coverage window. From here you can review coverage times, reaction times, resolution times, resources, and billing types associated with the contract.

6. Review the entitlements. For more information on service contracts refer to the *Oracle Service Contracts Concepts and Procedures Guide.*

7. After you have reviewed the contract in Service Contracts, close the Service Contracts Coverage window.

7

Managing a Customer's Installed Base

This chapter explains how to view, update, search for, and create customer installed base records from the Contact Center. It covers:

- About Managing a Customer's Installed Base
- Searching a Customer's Installed Base
- Viewing and Updating a Customer's Installed Base
- Configuring an Item Instance
- Adding an Item Instance to a Customer's Installed Base

7.1 About Managing a Customer's Installed Base

This group of topics explains how you can manage item instances for the customer account that you select in the Contact Center header.

> **Note:** If you would like to review all item instances for a customer regardless of account, you can blank out the account field in the Contact Center header.

If an instance name is entered in the IVR, Contact Center shows the customer information with the Install Base tab defaulted and the instance information showing in the summary table. However, if the customer does not have an instance name, the item instance, serial number, tag number, system, contract number, or order number can be used to filter the list of active instances for the customer account.

From the Install Base tab you can:

- Review active and expired installed base records. You can also filter a customer's installed base records by entering a unique identifier such as an order number. (The filtering information defaults if an Instance Name is used as the Service Key in the Search By field of the Contact Center header).

  See Searching a Customer's Installed Base on page 7-2.

- Launch the Install Base screen to view the details of the instance. You can then make updates to the item instance such as transferring ownership of the item instance, changing the current location and updating the contact's profile.

  See Viewing and Updating a Customer's Installed Base on page 7-3.

- Access the Configuration screen to make modifications to the configuration of the item instance.

  See Configuring an Item Instance on page 7-4.

- Add a new item instance to the customer's install base by selecting the New button.

  See Adding an Item Instance to a Customer's Installed Base on page 7-4.

7.2 Searching a Customer's Installed Base

Use this procedure to search a customer's installed base from the Contact Center.

To search a customer's installed base:

1. Display the customer in the Contact Center.

2. Select the Install Base tab.

   > **Note:** if you use the Instance Name identifier in the Search By field of the Contact Center header, the Install Base tab shows summary information by default. The Filter By value within the tab defaults to Instance Name.

3. Review the summary table.

   > **Note:** You can also refresh the summary table to show expired instances.

4. To show expired item instances:

   a. Select the Show Expired check box.

   b. Click Refresh.

   The summary table is refreshed and displays active and expired instances associated with the customer in the Contact Center header.

5. You can filter or search for a specific item instance using a unique identifier such as contract number, instance name, item instance, order number, serial number, system, or tag number.

   To filter installed base records:

   a. Select a value from the Filter By drop-down list.

   b. Enter a unique value for the filter that you selected, for example, an order number.

   c. Click Refresh.

   The summary table is refreshed and displays information related to the filtering information that you entered.

7.3 Viewing and Updating a Customer's Installed Base

Use this procedure to view and update an item instance from the Contact Center.

To view and update an item instance:

1. Display the customer in the Contact Center.

2. Select the Install Base tab.

3. Review the summary table. Select the item you would like to update.

4. Click Details.

   This launches the Item Instance Details page in Oracle Install Base.

5. Update the item instance details. For more information refer to the *Oracle Install Base User Guide*.

6. Click the Save icon in the toolbar.

7. Close the Item Instance Details Page.

8. To view your changes within the Contact Center, click Refresh within the Install Base tab.

This action will refresh the information displayed in the summary table.

7.4 Configuring an Item Instance

Use this procedure to configure an item instance from the Contact Center.

To configure an item instance:

1. Display the customer in the Contact Center.

2. Select the Install Base tab.

3. Select the item you would like to configure.

4. Click Configuration.

    This launches the Item Instance Configuration page in Oracle Install Base.

5. Configure the Item. For more information refer to the *Oracle Install Base User Guide.*

6. Click the Save icon in toolbar.

7. Close the Item Instance Configuration page.

7.5 Adding an Item Instance to a Customer's Installed Base

Use this procedure to add an item instance to a customer's installed base from the Contact Center.

To add an item instance to a customer's installed base:

1. Display the customer in the Contact Center.

2. Select the Install Base tab.

3. Click New.

    This launches the Create Item Instance page in Oracle Install Base.

4. Create the Item Instance. For more information refer to the *Oracle Install Base User Guide.*

5. Click Submit.

6. Close the Create Item Instance page.

7. To review the item instance from the Contact Center, click Refresh within the Install Base tab.

This action will refresh the information displayed in the summary table.

8

Managing Customer Contacts

This chapter explains how to use the Contact Center to manage customer contacts. It covers:

- About Customer Contacts
- Viewing Information About Customer Contacts in the Dashboard
- Updating Addresses and Contact Points for Customer Contacts
- Removing an Individual from the List of Contacts for a Customer
- Creating a New Contact
- Entering Details About a Contact
- Removing a Contact Points Record from Use
- Restricting Contact with a Customer Contact
- Capturing a Contact's Relationship with Another Organization or Individual

8.1 About Customer Contacts

A customer contact can be any individual who has a relationship with your customer.

If your customer is a business or an organization, then a contact may be an employee of that business or a consultant from a third company, for example. If your customer is a consumer, then the contact can be any other person such a relative, friend, or a representative of a company acting on behalf of that consumer.

> **Note:** While you can select your organization's employees (registered in Oracle HRMS) as contacts for a service request, you cannot enter them as customer contacts.

The procedures for creating and updating contact records are almost identical to those used for customer records.

However, contact records are designed to maintain only a subset of the information you enter for customers. Use them to enter only contact-specific information such as direct phone extensions, business e-mail addresses, addresses with mail stops, and job titles. Contacts are a separate entity in the database (party type of Party Relationship) and so cannot have their own accounts, personal profiles, employment histories, or product interests.

Each time you do create a brand new contact, the application automatically creates a second record for the contact as a customer (party of Person), however. If you do want to enter personal information about contacts, such as their education, employment history, and interests, you must display the same individual as a customer and make your entry while viewing their customer records.

All contact information you enter about a contact is stored in your database with the contact record. This means that if you enter an address or a phone number for a customer contact, this address remains with the contact and is not visible when viewing customer information. For example, if you enter 100 Main Street as the address for a Jim Jones, employee of Business World, then this address remains in the contact record for Jim Jones and does not display as an address for Business World or for any other Business World contact record.

8.2 Viewing Information About Customer Contacts in the Dashboard

The Dashboard tab of the Contact Center window can provide you with a summary of service request, task, order, installed base, and contract information that is associated with the contact.

This topic covers using the Dashboard tab to view summary information for a contact.

See Viewing Contact Summary Information in the Dashboard on page 8-3.

8.2.1 Viewing Contact Summary Information in the Dashboard

Use this procedure to view customer contact information in the Contact Center Dashboard.

To view customer contact information in the Dashboard tab:

1. Display the customer and contact in the Contact Center.

2. Select the Dashboard tab.

3. Select Contact: <your contact> from the View Details For drop down list in the Contact Center header.

   The Dashboard tab refreshes with the customer contact summary information.

   Note: You can click Refresh to display the latest information on the Dashboard tab.

   ---

4. You can view details of any of the summarized information by either:

   - Selecting an item and clicking View Details.

   - Double-clicking on the item.

5. Double-clicking on any item in the list displays the item. For example, double-clicking on a task, displays the task in the Tasks window.

   Note: The View By Account check box is not applicable to the contact. This check box is not available for selection for a contact.

8.3 Updating Addresses and Contact Points for Customer Contacts

You can use the Contact Center to enter and update the address and contact points used by the entire Oracle E-Business Suite of applications. This topic covers:

- Updating a Contact's Identifying Address and Contact Points on page 8-4

  Use this procedure to update the main address and contact information for a contact.

- Selecting a Different Address as the Identifying Address for a Contact on page 8-6

Follow this procedure if you wish to select a different contact address as the identifying address.

- Adding a New Address and Site for a Contact on page 8-7

  Follow this procedure to add a new address for your contact. Each address you add automatically becomes a new site for the contact.

- Specifying Uses Of An Address on page 8-8.

  Classify the uses of each address if you maintain many addresses for a contact.

- Indicating a Primary Address for a Particular Use on page 8-8

  If a contact has many addresses for a particular use, then follow this procedure to indicate the primary address for that use.

- Adding Contact Points for a Contact on page 8-9

  Use this procedure to enter phone numbers, e-mail addresses and other contact information for a contact.

- Adding Contact Points for a Contact Site on page 8-9

  A contact site may have its own independent phone or fax number.

8.3.1 Updating a Contact's Identifying Address and Primary Contact Points

Use this procedure to update a contact's existing identifying address and primary contact points. A contact can have many addresses, phone numbers, and e-mail addresses, but only one address, phone number, and e-mail appears by default in the Contact Center header and in the interfaces of other Oracle E-Business Suite applications.

This main address is called the contact's identifying address. The contact points are the contact's primary contact points.

Note: You can only use this procedure to modify the existing identifying information. If you wish to create new addresses or contact points or specify other addresses and contact points as the identifying information, then you must use the tabs of the Contact Center.

To modify identifying address and primary contact information:

1. Display the customer and contact in the Contact Center.

2. Click Edit in the Contact region.

   The Edit Contact window appears displaying the same information that appears in the Contact region of the Contact Center header.

   You can make changes to all the information displayed except the Party number and Account number fields, which are disabled.

3. If you wish to enter a title, then select a title from the Title drop-down list. The title you enter here is the title abbreviation used in front of a name in a letter. You enter a job title on the Party Information tab.

4. If you wish to modify the identifying address, then:

   a. Make sure the correct country is specified in the Country field.

   > **Note:** Your contact record may already have multiple addresses entered, but only the identifying address displays in this window. To avoid duplication, you may wish to check all contact addresses in the Addresses tab and make your changes there.

   b. Click on the address in the Address field.

      The Address window appears.

   > **Note:** The address appears in a format specific to the country selected. The formats are set up by your administrator.

   c. Modify the address.

   d. Click OK.

5. If you wish to modify the primary phone number, then:

   a. Enter the phone number as in the Phone fields.

   b. Select the phone type from the Type drop-down list.

6. If you wish to modify the primary e-mail address, then make your modification in the Email field.

> **Note:** Your contact may have more than one e-mail address and phone number already entered as part of their record. This field displays only the e-mail address and phone designated as primary in the Contact Points tab of the Contact Center. If you are not sure what e-mail addresses and phone numbers are entered for the contact, please use the Contacts Points tab instead to avoid duplication. See Adding Contact Points for a Contact on page 8-9 for details.

7. Click Save.

    Clicking Reset before you save returns the information back to the original defaulted values.

8.3.2 Selecting an Identifying Address for a Contact

You can select any existing address as the identifying address for a contact. A contact can have many addresses, but only one identifying address which appears by default whenever agents display the contact record. Use this procedure to select an existing address as the identifying address.

Prerequisites

You must create an address before you can select it as the identifying address. See Adding a New Address and Site for a Contact on page 8-7.

To select an address as the identifying address:

1. Display the customer and contact in the Contact Center.

2. Select the Addresses tab.

3. From the View Details For drop-down list, select Contact: <contact name>.

4. Click Identifying Address.

    The Identifying Address window appears.

5. Click Details (the button to the right of the Address field identified with an ellipsis).

    The Address Search window appears.

6. Search for the address you wish to use and select it.

7. Click OK.

8. If you do not find the address you wish to use as the identifying address, then add the address by following the procedure outlined in Adding a New Address and Site for a Contact on page 8-7.

8.3.3 Adding a New Address and Site for a Contact

Use this procedure to add a new address for a contact. When you add an address, you automatically create a new site for the contact.

To add a new address and site for a contact:

1. Display the customer and contact in the Contact Center.

2. Select the Addresses tab.

3. From the View Details For drop-down list, select Contact: <contact name>.

4. If no empty address record exists, then click New in the toolbar to create one.

5. Select the country for the address using the Address LOV.

6. Click on the Address field.

   The Address window appears.

   > **Note:**   The address format changes depending on the country. The address formats are set up by your administrator.

7. Click **OK**.

8. If this address is used for multiple uses, then specify those uses in the Site Usages region. See Specifying Uses Of An Address on page 8-8 for details.

9. Optionally, in the Primary Sites region, you can specify that this address is the primary address for a specific use. See Indicating a Primary Address for a Particular Use on page 8-8.

10. If you want to use this address as the identifying address for the contact, then:

    a. Click Identifying Address.

       The Identifying Address window appears.

    b. Click Details (the button to the right of the Address field identified with an ellipsis).

The Address search window appears.

   c. Search for the address you just entered.

   d. Click OK.

11. Click Save.

8.3.4 Specify Uses for an Address

Use this procedure to specify the different uses of a contact address.

> **Note:**   Do not specify contact addresses as billing addresses or other uses related to customer orders. Contact records are not associated with accounts, so any addresses you specify here are not passed on to your financial applications. If you wish to specify a billing address, enter it in the customer record instead.

Prerequisites

You must first add the address to the contact record.

To specify different uses for an address:

1. Display the customer and contact in the Contact Center.

2. Select the Addresses tab.

3. From the View Details For drop-down list, select Contact: <contact name>.

4. Select the address.

5. Select each use for this address using the Usage LOV in the Site Usages region. You can specify additional usages, by using the New icon in the toolbar, if required.

6. Click Save.

7. If you have entered multiple addresses for a particular use, you are now ready to specify which one is the primary address for that use. See Indicating a Primary Address for a Particular Use on page 8-8.

8.3.5 Indicating a Primary Address for a Particular Use

In the unlikely case that a contact has multiple addresses for the same use, you can use this procedure to specify which of these is the primary address for this use.

Prerequisites

You must specify uses of an address in the Site Usages region before you can specify which of these addresses are primary.

To indicate a primary address for a particular use:

1. Display the customer and contact in the Contact Center.

2. Select the Addresses tab.

3. From the View Details For drop-down list, select Contact: <contact name>.

4. In the Primary Sites region, use the Usage LOV to select the use.

5. Use the Address LOV to select the address you wish to specify as the primary address for this use.

6. Click Save.

8.3.6 Adding Contact Points for a Contact

Use this procedure to add the contact points for a contact and to indicate which of these contact points is primary. A contact can have multiple phone numbers and e-mail addresses. Specifying a contact point as primary will set the default agents see when they bring up the contact record.

To add contact points for a contact:

1. Display the customer and contact in the Contact Center.

2. Select the Contact Points tab.

3. From the View Details For drop-down list, select Contact: <contact name>.

4. Select a contact method from the Contact Method list of values.

   The remaining fields vary depending on the contact method you select.

5. If you selected Phone, then enter the phone number in the fields provided. The Value field is for the main phone number and the Ext field is for the phone extension.

6. If you select Web, then enter the URL in the Value field.

7. If you select Email as the contact method, then enter the e-mail address in the Value field.

8. If you select EDI, then enter the appropriate value in the Value field.

9. If you select Telex, then enter the telex number in the Value field.

10. Optionally, enter the best times to use this contact method in the Best Time From and Best Time To.

11. If you do not want a contact method to be used, then select the Do Not check box.

12. If you wish to indicate the contact point is primary, then make the following entries in the Primary Contact Point region:

    a. Select the contact method using the Contact Method LOV.

    b. Use the Value LOV to select the primary contact point for that contact method.

8.4 Removing an Individual from the List of Contacts for a Customer

Use this procedure to indicate an individual is no longer a contact for a customer. Doing so removes them from the contact List of Values for customer contacts. It does not remove them from your database.

To remove an individual from the list of contacts for a customer:

1. Display the customer and contact in the Contact Center.

2. Select the Relationship tab.

3. Select the contact from the View Details For drop-down list.

4. If you wish to remove an individual from the list of contacts for the customer, then select Inactive from the Status field for every relationship the contact has with the Customer.

5. Click Save in the toolbar to save your changes.

8.5 Creating a New Contact

Use this procedure to create a new contact in your database.

Prerequisites

You must create the customer before you can create a contact. See Creating a Customer on page 3-13.

To create a new contact:

1. Display the customer in the Contact Center.

2. To avoid duplication, you may wish to search for the contact using the Customer Search window to make sure the contact is not already in your database. See Searching for Customers Using Service Keys and the Customer Search Window on page 2-4.

   > **Note:** Oracle TeleService does not support fuzzy search, so you may wish to search for any alternate spellings and abbreviations of a contact name to make sure you are not creating a duplicate.

3. Click Create in the Contact region. (If this button is disabled, then clear the region by clicking the Clear Record icon in the toolbar.)

   The Create Contact window appears displaying the customer and defaulting customer information in the Contact Info region.

4. Select the title from the Title drop-down list. The title you select here is the title abbreviation used in front of a name in a letter. To enter a job title, use the Party Information tab on the Contact Center instead.

5. Enter the name in the First and Last fields.

6. Enter the phone number in the Phone fields. The first field is the country code which you can select using the list of values (LOV).

7. Optionally, select the address type using the Address Usage LOV.

8. If you know the contact's address is already entered in your database, then:

   a. Click Select Address to the right of the Address field. (This button displays the numbers 1,2, and 3, and a blue arrow pointing downwards.)

      The Address window appears.

   b. Search for the address using a partial address with the % sign to indicate any missing characters.

   c. Click Find.

   d. Select the address.

   e. Click OK.

9. If you wish to enter a new address for the contact, then:

    a. Enter the country for your customer address using the Country LOV. This determines the address format.

    b. If you would like to create a site name to identify the contact's address, then enter a site name. Each address you enter automatically becomes a site for that customer.

    c. Click anywhere within the Address field.

    The Address window appears.

    Note: The address appears in a format specific to the country selected. The formats are set up by your administrator.

---

    d. Enter the address.

    e. Click OK.

10. If you wish to enter personal address and contact information for the contact, you can do so in the Personal Info region. This is useful if your organization sells or services individual consumers or tracks personal information about contacts.

The information you enter here is saved under the customer record (party type of Person) that is automatically created along with the contact record. It is visible only when viewing the individual as a customer.

If you do want to enter personal information about the contact, such as education, employment history, and interests, you must display the same individual as a customer and follow the procedure outlined in Entering Employment, Education, and Other Personal Details on page 3-18.

11. Click Save.

The application displays a note informing you of any new party number that has been created and enters the new contact information in the Contact region of the Contact Center. You are now ready to enter more details about the contact such as the contact's job title and department. See Entering Details About a Contact on page 8-13.

The application automatically generates a Party Number if the administrator sets the profile options HZ: Generate Party Number to Yes.

8.6 Entering Details About a Contact

Use this procedure to enter details about a contact in the Party Information tab of the Contact Center window.

Prerequisites

You must create a contact before you can enter the details.

To enter details about a contact:

1. Display the customer and contact in the Contact Center.

2. Select the Party Information tab.

3. Select the contact, Contact: <contact name>, from the View Details For drop-down list.

4. If your customer is a contact at an organization, you can enter information about the contact's role including the contact's job title and job code.

5. Enter the pronunciation of the person's name in the Phonetic First Name, Phonetic Last Name, and Phonetic Middle Name fields. These fields are especially useful for Japanese customers entering names using Kanji.

6. You can select the contact's language using the Preferred Language list of values.

7. You can indicate if the person is a decision maker and if they can provide customer references by selecting the Decision Maker and Reference check boxes.

8. If you wish to restrict contact with the contact, then click Restrict Contact and enter the restrictions. See Restricting Contact with the Contact on page 8-14 for more details.

9. Click Save.

8.7 Removing a Contact Points Record from Use

Use this procedure for removing a contact record from use by making it inactive. This action removes the contact in all lists of values of contacts for all new transactions for the current customer only. Your action does not affect the availability of this contact for other customers.

> **Note:** Before you remove a contact record from use by making it inactive, be aware of the consequences this may have in other applications. Contact and customer records are visible across the entire Oracle E-Business Suite. Some applications:
>
> - Exclude inactive party records from their user interfaces.
>
> - Prevent users from creating records or business transactions for inactive parties.
>
> Consider these possible consequences before you set a party status to inactive.

To remove a customer record from use:

1. Display the customer and contact in the Contact Center.

2. Select the Party Information tab.

3. Select the customer, Contact: <customer name>, from the View Details For drop-down list.

4. Select Inactive from the Status list of values.

5. Click Save.

8.8 Restricting Contact with a Customer Contact

Use this procedure to restrict contact with a customer's contact. The restrictions you place on phone, e-mail, visits, and other contacts apply throughout your organization.

To restrict contacts with a customer contact:

1. Display the customer and contact in the Contact Center.

2. Select the Party Information tab.

3. Select the contact, Contact: <contact name>, from the View Details For drop-down list.

4. Click Contact Restrictions.

   The Contact Restriction window appears.

5. Select the contact method you wish to restrict using the Contact Method LOV.

6. Enter the start and end dates for the restriction in the From and To fields. If you wish to restrict the contact permanently, then choose an end date far off in the future.

7. Optionally, enter a reason for the restriction using the Reason LOV.

8. Click OK.

9. Click Save.

8.9 Capturing a Contact's Relationship with Another Organization or Individual

Use this procedure to capture a relationship the contact has with other organizations or individuals, for example, that the contact is the parent of person A or a board member of Organization B.

Note 1: The relationships you enter for your contact are stored with the customer record for the individual (the party of Person) and not with the contact record. This is because a party of Party Relationship cannot have relationships with another party in the customer model.

Note 2: The list of values you use to select the individual or organization for the relationship, includes all of the parties in your database, so make sure that you know the exact name to minimize long searches.

To capture a relationship for a contact:

1. Display the customer and contact in the Contact Center.

2. Select the Relationships tab.

3. Select the contact, Contact: <contact name>, from the View Details For drop-down list.

4. If no blank record is available, click New in the toolbar. (This is the icon with the green plus sign.)

5. The Subject field is pre-populated with the name of your contact.

6. Use the Relation LOV to select the relationship type.

7. Use the Object LOV to select the individual or organization for your contact's relationship. Restrict your search by entering at least a partial name.

> **Note:** The list of objects is restricted by the relationship you have chosen. For example, if you have chosen "Board member of", then you can only select organizations. If you have selected "Child of", then you can only select other persons.

8. If the relationship you are capturing is with an organization, then enter a title. Entry is optional.

9. Enter an end date if you wish this relationship to expire sometime in the future.

10. Click Save.

9

Managing Notes on Customers and Contacts

This chapter explains how to view and add notes for customers and contacts from the Contact Center. It covers:

- About Managing Notes on Customers and Contacts
- Viewing Notes
- Entering and Updating Notes
- Searching for Notes

9.1 About Managing Notes on Customers and Contacts

This group of topics explains how you can manage notes for both the customer and the customer contact that you select in the Contact Center header.

From the Notes tab you can:

- View Notes about a customer or contact. You can sort and view the notes by their status, private, public or publish.

    See Viewing Notes on page 9-2.

- Enter and update customer and contact notes. You can enter notes and set their statuses to private, public, or publish. You can also update the Note Type and Note Status.

    See Entering and Updating Notes on page 9-3.

    Note: For legal reasons you cannot update the note itself.

- Search for notes by querying the notes associated with a customer or contact. You can search for notes based upon:

    - Creation date range

    - Note Type

    - Note Status

    - Customer or Contact Notes

    You can also change the sort order to view earliest notes first.

    See Searching for Notes on page 9-6.

9.2 Viewing Notes

The following procedures cover:

- Viewing Notes for a Customer on page 9-2.

- Viewing Notes for a Contact on page 9-3.

9.2.1 Viewing Notes for a Customer

Use this procedures to view notes that your organizations has entered on a customer.

To view notes about a customer:

1. Display the customer in the Contact Center.

2. Select the Notes tab.

3. The table on the left side of the tab displays the notes for this customer.

4. You can sort the list by any column in the table by clicking on the column heading.

5. If you wish to search the text of the displayed notes, then:

    a. Right-click with the mouse on a description in the list.

    b. Select Find in Table in the pop-up window.

       The Find Contact Center Notes and Knowledge Management Link window appears.

    c. Enter the text you wish to find and click Find.

The application takes you to the first matching record.

9.2.2 Viewing Notes for a Contact

Use this procedure to view notes that your organization has entered on a contact.

To view notes about a contact:

1. Display the customer and contact in the Contact Center.

2. Select the Notes tab.

3. Select Contact: <your contact> from the View Details For drop down list in the Contact Center header.

4. The table on the left side of the tab displays the notes for this customer.

5. You can sort the list by any column in the table by clicking on the column heading.

6. If you wish to search the text of the displayed notes, then:

   a. Right-click with the mouse on a description in the list.

   b. Select Find in Table in the pop-up window.

      The Find Contact Center Notes and Knowledge Management Link window appears.

   c. Enter the text you wish to find and click Find.

      The application takes you to the first matching record.

9.3 Entering and Updating Notes

The following procedures cover:

- Entering and Updating a Customer Note on page 9-3.

- Entering and Updating a Contact Note on page 9-5.

9.3.1 Entering and Updating a Customer Note

Use this procedure to enter and update a note about a customer.

To enter and update a customer note:

1. Display the customer in the Contact Center.

1. Select the Notes tab.

2. Click New.

3. Optionally, select the type of note you want to create in the Type field.

4. Select a status for the note using the Status field LOV. The choices are:

    ▪   Private: This note can be viewed only by you.

    ▪   Public: Viewable by all Oracle E-Business Suite application users.

    ▪   Publish: Viewable by all Oracle E-Business Suite application users as well as external customers.

    > **Note:** Customers cannot view published notes you enter here on the Oracle iSupport Web portal. They can only view notes entered on a specific service request.

5. Enter a short note in the Note text box.

6. If you want to enter additional note text, then:

    a. Click Details.

        The Note Details window appears.

    b. Enter text of up to 32,000 characters in length.

        > **Note:** The additional text you enter in the Note Details window is not visible in the notes log or notes summary, and is not used by the application for knowledge base solution searches. You cannot search on this text.

    c. Click OK to return to the Notes tab.

7. Click Save to save the note you have created.

8. To update the Note Status:

    a. Select the note you would like to update.

    b. Change the Status.

    c. Click Save.

9. To update the Note Type:

   a.   Select the note you would like to update.

   b.   Select a Type from the list of values.

   c.   Click Save.

9.3.2 Entering and Updating a Contact Note

Use this procedure to enter and update a note about a contact.

To enter and update a contact note:

1. Display the customer in the Contact Center.

2. Select the Notes tab.

3. Select Contact: <your contact> from the View Details For drop down list in the Contact Center header.

4. Click New.

5. Optionally, select the type of note you want to create in the Type field.

6. Select a status for the note using the Status field LOV. The choices are:

   - Private: This note can be viewed only by you.

   - Public: Viewable by all Oracle E-Business Suite application users.

   - Publish: Viewable by all Oracle E-Business Suite application users as well as external customers.

   > **Note:** Customers cannot view published notes you enter here on the Oracle iSupport Web portal. They can only view notes entered on a specific service request.

7. Enter a short note in the Note text box.

8. If you want to enter additional note text, then:

   a.   Click Details.

   The Note Details window appears.

   b.   Enter text of up to 32,000 characters in length.

> **Note:** The additional text you enter in the Note Details window is not visible in the notes log or notes summaries, and is not used by the application for knowledge base solution searches. You cannot search on this text.

    c. Click OK to return to the Notes tab.

9. Click Save to save the note you have created.

10. To update the Note Status:

    a. Select the note you would like to update.

    b. Change the Status.

    c. Click Save.

11. To update the Note Type:

    a. Select the note you would like to update.

    b. Select a Type from the list of values.

    c. Click Save.

9.4 Searching for Notes

Use this procedure to search for notes:

To search for notes:

1. Display the customer in the Contact Center.

2. Select the Notes tab.

3. Select All Notes.

The View All Party Notes page appears.

> **Note:** When you launch the All Notes window, the notes for the contact appear for the date range defaulted in the All Notes window. You can filter the information displayed by selecting a different type, status, date range or view by. You can also change the sort order of the information displayed based upon the date.

4. Modify the default values, if required:

   a. Select a note type from the Type list.

   b. Select a note status from the Status list.

   c. Enter a date range to search for notes that were created within a specified time frame.

   d. Select a value from the View Details For list to search for customer notes or contact notes.

   e. Select or deselect the View Earliest Notes First check box.

5. Click Refresh.

   The search results appear.

6. You can manipulate the search results as follows:

   a. Select the Expand link to see note details.

   b. Conversely, select the Collapse link to hide note details.

   c. If there are more results to view, you can select the More button.

   Note: Your administrator defines the number of records that shows in the All Notes window at one time.

10

Managing Service Requests from the Contact Center

This chapter explains how to manage service requests within the Contact Center. It covers:

- About Handling Customer Service Request Inquiries in the Contact Center
- Searching for Service Requests
- Creating and Updating Service Requests
- Searching the Knowledge Base for Solutions
- Checking for Duplicate Service Requests
- Managing Service-Related Tasks from the Contact Center
- Capturing and Updating Extended Attributes
- Assigning Service Request Ownership
- Reassigning Service Requests
- Explaining Service Request Security

10.1 About Handling Customer Service Request Inquiries in the Contact Center

This group of topics explains how you can view the service request history for the customer account selected in the Contact Center header.

> **Note:** If you would like to review all service requests for a customer, you can blank out the account field in the Contact Center header.

If a service request number is entered in the IVR, Contact Center shows the customer information with the Service Request tab defaulted with the service request summary displayed in the history table and the details displayed on the tab. However, if the customer does not have a service request number, the serial number, tag number, RMA number, contract number, item instance or creation date range can be used to filter the list of open service requests for the customer account. In addition, the agent can choose to display the closed service requests in the service request history list.

From the Service Request tab you can:

- Search for a customer's service requests. You can bring up a summary list of service requests for a customer and drill into the details of a service request. You can also use the Search By field to identify the customer using the Service Request Number. This will result in identifying the customer in the Contact Center header and displaying the appropriate service request record in the Service Request tab.

  See Searching for Service Requests on page 10-3.

- Create a quick service request and update existing service request with the feedback from the customer. If required, you can launch the Service Request window to view the details of the service request including the log, tasks, charges, knowledge base, and other details.

  See Creating and Updating Service Requests on page 10-4.

- Search the knowledge base for solutions.

  See Searching the Knowledge Base for Solutions on page 10-9.

- Check for duplicate service requests. You can identify if there is an existing service request for the same issue to avoid creation of a new service request. If you find a duplicate service request you can identify the original service request and link the new service request as a duplicate to avoid having multiple resources work on the same issue.

  See Checking for Duplicate Service Requests on page 10-11.

- Use tasks to assist customers with the service request.

See Managing Service-Related Tasks from the Contact Center on page 10-11.

- Enter extended attribute information.

  See Capturing and Updating Extended Attributes on page 10-13.

- Assign service request owners.

  See Assigning Service Request Ownership on page 10-14.

- Reassign service requests.

  See Reassigning Service Requests on page 10-14.

10.2 Searching for Service Requests

Use this procedure to search for service requests from the Contact Center.

For information on managing the Service Requests window, see Creating a Service Request on page 11-2.

To search for a service request:

1. Display the customer in the Contact Center.

2. Select the Service Request tab.

   > **Note:**   If you use the Service Request Number identifier in the Search By field of the Contact Center header, the Service Request tab defaults showing the summary information. The Filter By value within the tab defaults to Service Request Number.
   >
   > Additionally, the customer and contact associated with the service request appear in the Contact Center header.

3. Review the summary table.

   > **Note:**   You can also refresh the summary table to include closed service requests.

4. To show closed service requests:

   a. Select the Include Closed check box.

   b. Click Refresh.

   The summary table is refreshed and displays active and closed service requests associated with the customer or contact in the Contact Center header.

5. To view service requests created within a specific date range:

   a. Select a date in the From Date field.

   b. Select a date in the To field.

   c. Click Refresh.

6. You can filter or search for a specific service request using a unique identifier such as contract number, item, RMA number, serial number, service request number, and tag number.

   To filter service request records:

   a. Select a value from the Filter By drop-down list.

   b. Enter a unique value for the filter that you selected, for example, a service request number.

   c. Click Refresh.

   The summary table is refreshed and displays information related to the filtering information that you entered.

   Note: You can select a contact in the Contact Center header and then choose Contact from the View Details For drop-down list. This enables you to view the service request records that are associated with the contact rather than all of the service request records associated with the customer.

10.3 Creating and Updating Service Requests

Use these procedures to create and update a service requests from the Contact Center.

To create a service request

1. Display the customer in the Contact Center.

2. Navigate to the Service Request tab.

3. Click the New icon in the toolbar.

4. Enter a summary of the customer problem in the Summary field.

5. Select the type of service request you are creating using the Type list of values (LOV). Depending on your implementation, selecting a service request type may:

   ▪ Restrict the problem codes you can use to describe the problem

   ▪ Determine the available status settings

   For example, for "Accounting Problem" type service requests, you may specify a problem code of "Billing Error" and a status of "Under Review." For "Equipment Failure", the selections would change instead be "Defective Hard Drive" and "Working".

   After you submit the service request, a service request type can also:

   ▪ Launch an Oracle Workflow process

   ▪ Automatically assign tasks to individuals in your organization

6. If you know the problem code for the problem your customer is calling about, enter it using the Problem LOV.

   Problem codes provide a standard way for organizations to describe customer problems.

7. If the customer is calling about an item they have purchased, then:

   a. If you know the item's serial number or its Oracle Install Base instance number, then enter one or the other using the list of values (LOV) in the Serial or Instance fields.

   b. If you do not know either number or the item is not registered in the customer's install base, then you can search for the item either by inventory item number (using the Item LOV) or by the item's description (the LOV in the field to the right of Item).

8. If the problem requires you to record an incident address, for example, if your organization has to dispatch an agent to the customer site to solve the problem, then:

   a. Some contracts cover only specific customer locations, so check with the customer if the incident address in the Address field is correct. You may have to scroll down within the tab to view the address which defaults from the identifying (main) customer address or from the Installed At address in Oracle Install Base.

b. If the address is incorrect or blank, then make sure the check box to the right of the Address field is selected and search for the address using the LOV.

> **Note:** The list of values permits you to select any address in your database as the incident address.

c. If the incident address does not exist and you wish to record this address as a customer address, then create it on the Addresses tab first. (See Adding a New Address and Site for a Customer on page 3-7). You can also enter an incident address as text as you would a non-postal location as described in the next step.

9. If the incident takes place at a location without a postal address, for example, if you must send an agent to GIS or GPS coordinates or to the intersection of two roads, then enter the location as text:

a. Select the One Time Address check box.

b. Enter the location in any of the address fields.

> **Note:** Entering a location as free text, does not store the address in your database as a valid address. Any address you enter in this way does not appear in lists of values and is not available for any other business functions such as billing or shipping.

10. Select a severity of the problem using the Severity LOV. The severity you choose here may determine how quickly your organization is contractually bound to respond and resolve the customer problem.

11. If the customer is calling for service that may be covered by a warranty or a service contract, then:

a. Check the customer's entitlements by clicking the button to the right of the Contract field.

The Contract window appears.

b. Select Get Contracts.

c. If a contract applies, then select it using the check box to the left.

Selecting a contract populates the service request with information designed to help your organization meet its contractual obligations. This may include the required time by which your organization must resolve the issue (displayed in the Resolution By field), and the preferred resources who are to help the customer.

12. If you would like to enter a note for the service request, then:

   a. Type in your note in the Note field located on the right of the tab.

   b. Optionally, select a Note Type.

   > **Note:** If your organization has mapped note types to Oracle Knowledge Management statement types, then you can use specific note types to search your organization's knowledge base or even contribute solutions of your own.

   c. If you wish for the customer to see this note when they review the service request on their Oracle iSupport Web site, then select Publish from the Status drop-down list.

   Setting a status to Public, makes the note visible to all other agents with access to the service request. A status of Private, keeps the note private.

   > **Note:** You can also create notes while viewing the Service Request log.

13. Click the save icon in the toolbar to save the service request.

14. Search the knowledge base to look for solutions to the customer problem by clicking Search Knowledge.

To update a service request:

1. Display the customer in the Contact Center.

2. Select the Service Request tab.

3. Select a service request from the summary table.

   The region below the summary table contains detail information associated with the service request.

4. To update service request detail information:

        a. Select a field and enter or change a value. For example, enter an item number.

        b. Click the Save icon.

5. To add a note:

        a. Select a Note Type from the list of values.

        b. Select a Note Status from the list of values.

        c. Enter a description in the Note field.

        d. Click the Save icon.

> **Note:** You can add a new note by clicking the New icon in the toolbar.

6. To search the knowledge base, click Search Knowledge.

   The Knowledge Management Simple Search Result pages appears, passing the context of the problem, item instance, and service request summary to enable context based searching for problem resolution.

   For information on creating a solution refer to the *Oracle Knowledge Management User Guide.*

7. To review the log, click Log and Notes.

   The Log Notes window appears. You can use this window to view the log in more detail and you can also add a quick note to the service request.

> **Note:** You can view a printer friendly format of the log in an HTML page by clicking Print Friendly Format.

8. To create a quick task, click Quick Task.

   The Tasks Schedule window appears.

9. To schedule tasks, click Schedule Task.

   The Service Request window appears with the Tasks tab defaulted to enable you to manage and schedule tasks.

> **Note:** Your administrator can set up the application to automatically generate tasks to help resolve customer problems. Automatic task generation is most useful for known problems that have standard resolutions.

10. To create or review estimates and actual charges, click Charges.

    The service request window appears with the Charges tab defaulted to enable you to provide estimates or actual amounts charged to the customer for services rendered.

11. To open the Service Request window, click Details.

    The service request window appears with the default tab selected.

    For information on managing the Service Requests window, see Creating a Service Request on page 11-2.

    > **Note:** Be sure to save your work if you make any updates to the service request.

10.4 Searching the Knowledge Base for Solutions

You can search your organization's knowledge base from the Contact Center for potential solutions to customer problems

Use this procedure to perform simple searches of the knowledge base from the Service Request tab of the Contact Center, in order to solve problems related to a service request.

Prerequisites

You must create a service request first.

To search the knowledge base for solutions to a service request:

1. After you save the service request, click Search Knowledge button.

    The application searches for solutions using the entries you made in the following service request fields:

    - Summary

    - Notes (of types mapped to knowledge management statement types)

- Product
- Platform

The Oracle Knowledge Management's Simple Search page opens in a browser window displaying the possible solutions to the problem in the Results region.

2. To view any solution:

   a. Click the solution title link.

      The solution displays in the Solution Detail page.

   b. If you are troubleshooting the problem with the customer, then indicate the usefulness of the solution by clicking one of the buttons below the question "Is this solution helpful in resolving your issue?" at the bottom of the page:

      * Yes: Indicates the solution helped you to solve the problem. This selection increases the ranking of a solution on subsequent searches.

      * No: The solution did not help you. This decreases the ranking of this solution on subsequent searches.

      * Maybe: You or the customer has not tried the solution, but you want to suggest it as a potential solution. Clicking this button links the solution to the service request and makes it visible to customers on their Oracle iSupport Web portals.

   c. If you or the customer have not tried the solution, but you would like to suggest it as a potential solution, then click Maybe.

      Any solution you label as a potential solution is linked to the service request and can be viewed by customers on their Oracle iSupport Web portal and by other agents in the Service Request window.

      Note: You can also search the knowledge base without entering a service request by clicking the Knowledge Base Search icon in the toolbar and launching Oracle Knowledge Management.

      For more details of different search methods please see the *Oracle Knowledge Base User Guide*.

10.5 Checking for Duplicate Service Requests

Your administrator can set up the application to automatically detect potential duplicate service requests, if the service requests are similar and were created within a specified time frame.

For information on checking for duplicate service requests, see Checking for Duplicate Service Requests on page 11-6.

10.6 Managing Service-Related Tasks from the Contact Center

This group of topics describes how to create and assign service-related tasks such as scheduling a technician to repair a copier from the Service Request tab of the Contact Center.

The task functionality in Oracle TeleService is provided by the Tasks module which is a part of the Oracle E-Business Suite foundation. The Tasks tab is designed to provide you with an easy way to create and view tasks related to specific service requests.

You can find more information about using tasks in the *Oracle Common Application Components User's Guide.*

The task-related topics covered here include:

- Creating a Quick Task on page 10-11.

- Scheduling Tasks on page 10-12.

- Assigning Task Ownership Automatically on page 10-13.

- Using Auto Task Generation on page 10-13.

10.6.1 Creating a Quick Task

You can access the Task Schedule window from the Service Request tab of the Contact Center. This enables you to view a summary of existing tasks, create a new task, or update tasks as needed.

Use the following procedures to create a task manually.

To create a quick task:

1. Display the customer in the Contact Center.

2. Select the Service Request tab.

3. Select a service request from the summary table. Any task you create will be associated with the selected service request.

4. Select Quick Task.

   The Tasks Schedule window appears.

5. Use the Type list of values to select a task type.

6. Select a task status using the Status LOV.

7. Enter a name for the task in the Subject field.

8. In the Desc field, enter a brief description of the task.

9. If needed, in the Parent field, select a task to which this task is to be linked. Normally, you would select a parent task if the task you are creating is a follow up on another task.

10. Assign task ownership to a group or person who will be responsible for the completion of the task (Owner Type and Owner fields) and to the individuals or teams who will complete the tasks (Assignee Type and Assignee).

11. Select the Planned Start and End Dates.

12. Click Save on the toolbar.

    A system generated task number is displayed in the Number field.

13. Click Ok to close the Tasks Schedule window.

10.6.2 Scheduling Tasks

If you need to update the schedule for a task, you can launch the Service Request window with the Task tab defaulted from within the Service Request tab of the Contact Center.

Use the following procedures to schedule a task.

To schedule a task:

1. Display the customer in the Contact Center.

2. Select the Service Request tab.

3. Select a service request from the summary table. Any task you create will be associated with the selected service request.

4. Select Schedule Task.

5. The Service Request window appears with the Tasks tab defaulted. The service request you selected within the Contact Center is contained within the service request header.

6. For details on managing tasks in the Service Request window, see Managing Service Request Tasks on page 14-1.

10.6.3 Assigning Task Ownership Automatically

Your administrator can set up Oracle TeleService to assign tasks automatically. For more information, refer to the *Oracle TeleService Implementation Guide*.

10.6.4 Using Auto Task Generation

Your administrator can set up Oracle TeleService to automatically generate tasks to help resolve customer problems. Automatic task generation is most useful for known problems that have standard resolutions.

For more information on viewing automatically generated tasks, see Using Auto Task Generation on page 14-8.

10.7 Capturing and Updating Extended Attributes

If your company has defined extended attributes for service requests, you can capture and update these attributes using the new Attributes button.

Use the following procedures to capture and update extended attributes from the Service Request tab of the Contact Center.

To capture extended attributes

1. Display the customer in the Contact Center.

2. Select the Service Request tab.

3. Select a service request type from the Type field.

   If there are extended attributes defined for the service request type the Attributes button is active.

4. Select the Attributes button.

   The Service Request Attributes window appears.

5. In the Service Request Attributes region, enter or select values for each attribute name.

6. Click Ok.

7. Click the Save icon in the toolbar.

To update extended attributes:

1. Display the customer in the Contact Center.

2. Select the Service Request tab.

3. Select a service request from the summary table.

The region below the summary table contains detail information associated with the service request. If there are extended attributes defined for the service request type the Attributes button is active.

4. Select the Attributes button.

The Service Request Attributes window appears.

5. In the Service Request Attributes region, enter or select a value for the attribute you wish to update.

6. Click Ok.

7. Click the Save icon in the toolbar.

10.8 Assigning Service Request Ownership

Your administrator can setup the application to assign ownership of a service requests both manually and automatically.

For information on assigning service request ownership, see Assigning Ownership of Service Requests on page 11-34.

10.9 Reassigning Service Requests

Use this procedure to reassign a service request from the Service Request tab in the Contact Center.

To reassign a service request:

1. Display the customer in the Contact Center.

2. Select the Service Request tab.

3. Select a service request from the summary table.

4. In the Owner field, select a different owner from the list of values.

5. Click the Save icon.

10.10 Explaining Service Request Security

Your administrator can define which users can access the various service request types. This is accomplished by the mapping of user responsibilities to service request types.

For information on service request security, see Explaining Service Request Security on page 11-66.

11

Managing Service Requests

This chapter provides Tier-2 customer service agents with process-oriented, task-based procedures for using the Service Request module to manage service requests. It covers:

- Creating a Service Request

- Checking for Duplicate Service Requests

- Displaying a Service Request for You to Work On

- What Do I Work on Next?

- Updating a Service Request

- Entering the Incident Address or Location

- Searching For a Service Request

- Copying a Service Request

- Selecting a Customer for a Service Request

- Viewing a Profile of Your Customer

- Viewing Item Details and Entering the Item in the Service Request

- Checking a Customer's Contract Coverage

- Searching for and Displaying Installed Base Items

- Assigning Ownership of Service Requests

- Using Notes in Service Requests

- Adding Attachments to a Service Request

- Searching the Knowledge Base and Suggesting Solutions

- Viewing the Service Request Log

- Creating and Updating New Contacts for a Service Request

- Selecting Billing and Shipping Addresses

- Managing Service Request Tasks in the Service Request Window

- Viewing Interactions and Activities

- Specifying Relationships to Other Service Requests and Objects

- Viewing a List of Service Requests by Customer or by Item

- Printing a Service Request

- Closing a Service Request

- Indicating You are Not Available to Receive Work

- Setting Default Values to Speed Up Service Request Creation

- Explaining Service Request Security

11.1 Creating a Service Request

Oracle TeleService makes it possible for each service organization to create its own process for creating and managing service requests, so you can use this general procedure only as a guideline.

To create a service request:

1. Navigate to Service Requests > Create Service Requests or, if you know of a similar service request, you can speed up the creation process by making a copy following the procedure described in Copying a Service Request on page 11-25.

2. Select a customer. You can select a customer by name or by entering a single piece of identifying information such as the serial number of an installed base item, the customer's contract number, or the phone number. For details on the different service request entry points, see Selecting a Customer for a Service Request on page 11-27.

Note 1: In the case of service providers with a large, geographically diverse, customer base, consider filtering customer and contact list of values by country and postal code. You can do this by selecting a Country and Postal code within the Contact and Customer regions of the Service Request header.

Note 2: If a new contact calls to request service, you can create a record for the new contact, by selecting the Create Contact button to the right of the Last field in the Contact region of the Service Request header. This opens the Create Contact window. After you create a contact, you can continue logging the service request.

3. Select the Workbench tab and enter a summary of the customer problem in the Problem Summary field.

Note: A customer and a problem summary are the only two pieces of information you must enter to create a service request. However, your administrator can also require that you enter a contact by setting up a profile option.

The other mandatory fields, Type, Status, and Severity can be automatically defaulted from preferences stored in system profile options. You can set up your own default preferences by following the procedure outlined in Setting Your Personal Defaults to Speed Up Service Request Creation on page 11-63.

4. In the Service Request window header, check the Type field to see if the defaulted service request type is correct. If not, use the list of values (LOV) to select one. Depending on your implementation, selecting a service request type may:

- Restrict the problem codes you can use to describe the problem
- Determine the available status settings
- Restrict the resolution codes you can use to identify how the service request was resolved.
- Restrict the people who can view and update the service request.

For example, "Accounting Problem" type service requests may include a problem code of "Billing Error" and a status of "Under Review" For "Equipment Failure", this would be "Defective Hard Drive" and "Being Repaired".

> **Note:** Service request types flagged as eAM identify asset maintenance service requests logged against internal assets.
>
> Oracle Enterprise Asset Management (eAM) uses work orders to resolve service requests. The Service Request form provides functionality to display all work orders associated with a given service request.
>
> See Creating Asset Maintenance Service Requests for Internal Assets on page 12-1.

After you save the service request, the service request type you select may also launch an Oracle Workflow process

> **Note:** You can tell if a workflow has been triggered by checking to see if the Active Workflow check box is selected. This check box is located at the bottom of the right-hand column of the service request header. To see it, you must view the entire header by clicking Maximize or Minimize the Header (the right-arrow button on the top right corner of the Service Request window).

5. Select a severity for the service request using the Severity LOV. The severity represents your organization's determination of the seriousness of the customer problem and determines how quickly your organization must respond. Selecting a different severity together with the service request type can affect the date and time the service level agreement populates in the Respond by and Resolve by fields, since the severity will impact these dates and times from default coverage.

6. On the Workbench tab, you can optionally select an urgency using the Urgency LOV. The urgency represents the customer's perception of the seriousness of the problem.

7. If the customer is calling about an item in inventory or the installed base, then:

    a. If you know the item is registered in the customer's installed base, then you can enter it by Serial (Number), Tag (Number), or System (Number). Or you

can search the installed base by clicking the Find (flashlight) icon next to the Item field. See Searching for and Displaying Installed Base Items on page 11-32.

b. If the item is not registered in the customer's installed base, then you can search for the item either by inventory item number using the Item list of values or by the item's description using the Desc LOV.

8. If you know the problem code for the problem your customer is calling about, then enter it using the Problem Code list of values on the Workbench tab.

Problem codes provide a standard way for organizations to describe customer problems.

> **Note:** The list of problem codes can be determined based on a service request type, an item category, or an item.

The system determines a list of valid problem codes based on the values entered on the service request. The following are some of the rules and validations:

- Unmapped problem codes always appear in the Problem Code list of values. Unmapped problem codes are generic and apply to all request types, products, and product categories.

- If an item, but no item category has been selected for the service request, the application will look for all problem codes that are valid either for the item, or for any of the item categories, of which the item is part.

- If no problem codes have been identified after evaluating all problem code mapping criteria, the list of values shows all unmapped problem codes defined in the system.

- If the problem code becomes invalid after updating some of service request's attributes, the problem code is cleared, and you must select a new, valid, problem code.

9. If the problem requires you to record an incident address, for example, if your organization must dispatch an agent to fix the problem, then enter the incident address using the Address field LOV or as free text. See Entering the Incident Address on page 11-16 for instructions.

10. If you wish to check a customer's coverage by warranties and contracts, then select the Subject tab and follow the procedure outlined in Checking a Customer's Contract Coverage on page 11-30.

Selecting a contract populates the service request with information designed to help your organization meet its contractual obligations. This may include the required time by which your organization must respond to the issue, resolve the issue, and the resources preferred to help the customer.

11. If you wish to search your organization's knowledge base for a solution to the problem, then select the Workbench tab and follow the instructions for Searching the Knowledge Base and Suggesting Solutions on page 11-43.

12. You can also:

- Assign the service request to an individual or group in your organization using the Assign Owner and Assign Group buttons, or by using the Owner and Group lists of values in the service request header. See Assigning Ownership of Service Requests on page 11-34.

- Enter a note. Using Notes in Service Requests on page 11-37.

- Add an attachment. Adding Attachments to a Service Request on page 11-42.

- Add or remove customer and employee contacts. See Creating and Updating New Contacts for a Service Request on page 11-49.

- Select addresses and parties for billing and shipping. See Selecting Billing, Shipping, and Installed At Parties and Addresses on page 11-52.

- Create and manage the tasks required to resolve the service request. See Managing Service Request Tasks on page 14-1.

- Provide links to related service requests and to other documents such as invoices or maintenance plans. See Specifying Relationships to Other Service Requests and Objects on page 11-53.

- Charge the customer for services. See Creating a Charge Line on page 20-9.

13. Click Save on the toolbar to save your work.

11.2 Checking for Duplicate Service Requests

Your administrator can set up the application to automatically detect potential duplicate service requests, if the service requests are similar and were created

within a specified time frame. Depending on the setup used, the application can detect potential duplicates when you:

- Enter a service request.

- Save a service request.

- Use Oracle TeleService to open a potential duplicate service request, that was created in Oracle iSupport.

Your administrator can define the criteria used for detecting duplicates. The system uses this criteria to match data between the existing service request and the new service request. Specifically, your administrator can set up the application to use the following data to detect duplicate service requests:

- Instance

- Customer, Item, and Serial Number

- Customer and Item

- Extended Attributes

- Incident Address

- Extended Attributes and Incident Address

- Instance and Extended Attributes

- Instance and Incident Address

- Instance, Extended Attributes, and Incident Address

- Customer, Item, Serial Number, and Incident Address

- Customer, Item, Serial Number, and Extended Attributes

- Customer, Item, and Extended Attributes

- Customer, Item, and Incident Address

- Customer, Item, Extended Attributes, Incident Address

> **Note:** There are limitations as to which method is used to detect potential duplicates. For information on the different methods for setting up duplicate checking, refer to the *Oracle TeleService Implementation Guide*.

Use the following procedures to check for duplicate service requests.

Prerequisite

In order to check for duplicates using any of the following procedures, you will need to confirm that your administrator has completed the appropriate setup steps.

To check for duplicates upon entering a service request (before saving):

1. Navigate to the Service Request window.

2. Enter an item instance or a serial number.

    If there are existing service requests for this item instance or serial number, the Existing Service Requests pop-up window appears.

3. Determine if a service request has been logged for the same issue for a particular serial number or item instance.

    Select a service request from the list and double click on the Number to review the service request detail. A second Service Request window appears.

4. After you review the second service request, close that Service Request window and select the Existing Service Request pop-up window.

    a. If a duplicate service request exists, select Abort Creation to avoid creating a duplicate service request.

        The Existing Service Requests window disappears and the Service Request form is populated with the service request you selected in the Existing Service Requests window.

    b. If a duplicate service request does not exist, click the Continue Creation button to continue to create the service request.

To check for duplicates upon saving a service request:

1. Create a service request.

    > **Note:** Your service request must include the same combination of customer, item, instance, serial number, incident address, or extended attributes, that your administrator has used to detect potential duplicates.
    >
    > Verify this with your administrator.

2. Click the Save icon on the toolbar.

3. If potential duplicate service requests exist in the system, the Potential Duplicate Service Requests pop-up window appears with a listing of the potential duplicate service requests.

4. Determine if a duplicate service request exists.

   Select a service request from the list and double click on the Number to review the service request detail. A second Service Request window appears.

5. After you review the second service request, close that Service Request window and select the Potential Duplicate Service request pop-up window.

   a. If the service request is not a duplicate, select Not a Duplicate.

      The Potential Duplicate Service Requests pop-up window disappears. The service request is assigned a service request number in the Service Request window.

   b. If the service request is a duplicate, select Duplicate to link the new request as duplicate of the original request.

      If you see a note stating that the service request will be linked as a duplicate. Click Ok.

      The Potential Duplicate Service Requests pop-up window disappears. The service request is assigned a service request number in the Service Request window; depending on the setup, its status may be changed to Closed. The new service request is linked as a duplicate.

      Note: From the Service Request window, you can select the Related Objects tab; within the Related Service Request region of this tab, you can view information regarding the duplicate service request and open the original service request.

      ---

6. Close the Service Request window.

To check for duplicates of service requests created in Oracle iSupport:

1. Navigate to the Service Request window.

2. Open a service request.

> **Note:** The following steps occur the first time you use the Service Request form to open a potential duplicate service request, that was created in Oracle iSupport.

3. If potential duplicate service requests exist in the system, the Potential Duplicate Service Requests pop-up window appears with a listing of the potential duplicate service requests.

4. Determine if a duplicate service request exists.

   Select a service request from the list and double click on the Number to review the service request detail. A second Service Request window appears.

5. After you review the second service request, close that Service Request window and select the Potential Duplicate Service request pop-up window.

   a. If the service request is not a duplicate, select Not a Duplicate.

      The Potential Duplicate Service Requests pop-up window disappears. The service request is assigned a service request number in the Service Request window.

   b. If the service request is a duplicate, select Duplicate to link the new request as duplicate of the original request.

      If you see a note stating that the service request will be linked as a duplicate. Click Ok.

      The Potential Duplicate Service Requests pop-up window disappears, depending on the setup, its status may be changed to Closed. The service request is linked as a duplicate.

      > **Note:** From the Service Request window, you can select the Related Objects tab; within the Related Service Request region of this tab, you can view information regarding the duplicate service request and open the original service request.

6. Close the Service Request window.

11.3 Displaying a Service Request for You to Work On

Use this procedure to display a service request you wish to work on either by selecting it from your work queue or by searching for it.

To display a service request for you to work on:

1. If you wish to work on a service request a customer has logged on the Web using Oracle iSupport or a service request assigned to you by someone else in your organization or by the auto-assignment feature of the application, then:

   a. Navigate to Universal Work Queue.

   b. Open the Service Requests type heading and select My Owned in the Work Type column.

   Note: Service requests owned by individuals appear both under My Service Request and Group Owned headings. This means that the Group Owned heading includes unassigned service requests as well as those that have been assigned to others in your group.

   If your organization's business practices assign ownership only to groups, you can select a service request under the Group Owned heading. If you do so, you must make sure nobody else is working on the same service request as the application does not prevent multiple individuals from accessing the service request at the same time.

   c. Select the service request you wish to work on and double-click on it.

   The service request displays in the Service Request window.

   See the *Oracle Universal Work Queue User Guide* for more details.

2. If you know the service request number, then you can view the service request by entering the service request number using the Query by Example method:

   a. Navigate to the Service Requests > Create Service Requests.

   The Service Request window appears.

   b. From the View menu, select Query by Example > Enter.

   c. In the Number field on the top right hand side of the window, enter the service request number.

   d. From the View menu, select Query by Example > Run.

    e. The window displays the service request. For further information on searching using this method see the *Oracle Applications Users Guide*.

3. If you wish to search for the service request using one or more criteria, including customer name, service request status, or note text, then:

    a. Navigate to the Service Requests > Find Service Requests.

    The Search Service Request window appears.

    b. Search for the service request as described in Searching For a Service Request on page 11-18.

11.4 What Do I Work on Next?

This topic explains the differences between manual work assignment and the two modes of automated assignment:

- Manual Assignment on page 11-12

- Semi-automated Work Assignment on page 11-13

- Automated Work Assignment on page 11-13

> **Note:** You will need to check with your administrator to determine how your company has set up Oracle TeleService to assign work.

11.4.1 Manual Assignment

You can take ownership of any task or service request in the Universal Work Queue or assign ownership of that item to a different individual provided you can access the work queue. You can assign Service Requests and Service Request Tasks by using Service Request window and specifying the owner directly in the Owner field.

Manual work assignment:

- Does not take into account the priority of the item you choose to work on.

- Does not prevent multiple agents from choosing to work on the same item.

11.4.2 Semi-automated Work Assignment

You can also use the Assignment Manger to help you assign work. This application foundation module can be invoked by clicking the button beside the Owner fields in the Service Request window, within the Service Request header and the Tasks tab of the Service Request.

You can use the Assignment Manager in the assisted mode, in which case the Assignment Manger preselects a list of resources based on service territories and preferred resources in Oracle Service Contracts and Oracle Install Base. In the manual mode, you select a resource using a list of values of all available resources.

See the Assignment Manager section of the *Oracle Common Application Components User's Guide* and *Oracle Common Application Components Implementation Guide*.

11.4.3 Automated Work Assignment

To overcome these problems, Oracle TeleService provides service organizations two ways of automating the assignment of work to agents:

- Push Method

  The application assigns service request and task ownership to groups and individuals based on contracts, installed base, and service territories.

  When assigning service requests to individuals, the application also takes into account qualifications, availability, and the workload of your resources.

- Pull Method

  The application assigns service requests and tasks to groups, you can request ownership for groups to which you belong through the Universal Work Queue.

  You can use the following methods to "pull" work:

  - Select the Next Work button in the Universal Work Queue toolbar.

    After you click this button, the application compares the priorities and due dates of all work items that are either already assigned to you, or not yet assigned to you, but are assigned to a group of which the you are a member. The Work Item of the highest priority and earliest due date is assigned to you, if it is not yet assigned. Additionally, the Service Request window is opened with the Service Request or Service Request Task, that has just been assigned.

  - Select the Request Work button in the Universal Work Queue toolbar.

Request Work is very similar to the Next Work function but it does not look at work items that are already assigned to you; it looks for the most urgent unassigned work items. Unassigned work items are those work items that are assigned to groups, but not those that are assigned to individuals. The Work Items of the highest priority and earliest due date are assigned to you.

Request Work assigns new work items to you, but does not open an item in its appropriate window.

Note: The Request Work function has the visibility of all service requests assigned to groups, but not those assigned to individuals.

Service Requests that do not have any assignments, neither group nor individual, are not visible in UWQ. You can see these service requests only if you query them in the Service Request window, or in the Service Request tab within the Contact Center.

For more information on using the Universal Work Queue refer to the *Oracle Universal Work Queue User Guide*.

■ Select the Next Work button in the Service Request toolbar after you finish working on a service request.

If you only work on service requests, you can simply click Next Work. This executes the Next Work function, resulting in the next most urgent service request being assigned, if it is not yet assigned yet, and displayed.

For information on setting up service request and task assignment refer to the *Oracle TeleService Implementation Guide*.

11.5 Updating a Service Request

This topic provides guidelines for updating service requests.

To update a service request:

1. Display the service request in the Service Request window by navigating to Service Requests > Find Service Requests. See Displaying a Service Request for You to Work On on page 11-11.

2. If you wish to record a change in the status of a service request, then select the new status using the Status list of values.

> **Note:** If your organization has implemented status transition rules, your choice of statuses can affect how you can update the service request in the future. For example, if you change a status of a service request to "Closed", you or others in the organization may not be able to update the problem description.

3. You can update the Responded On and Resolved On dates manually or leave the defaulted values.

   These dates are automatically populated when you update the service request status.

   - If the new status indicates that the service provider has responded, the Responded On date is populated.

   - If the new status indicates that the service provider has resolved the issue, the Resolved On date is populated.

4. You can also:

   - Enter the location of the customer problem in the Address field of the Service Request window header. See Entering the Incident Address or Location on page 11-16.

   - Select a contract on the Subject tab. See Checking a Customer's Contract Coverage on page 11-30.

   - Assign the service request to an individual or group in your organization using the Assign Owner and Assign Group buttons in the service request header. See Assigning Ownership of Service Requests on page 11-34.

   - Enter an installed base item using the fields in the service request header. See Searching for and Displaying Installed Base Items on page 11-32.

   - Enter an inventory item using the lists of values in the Item and Desc. fields in the service request header. See Viewing Item Details and Entering the Item in the Service Request on page 11-29.

   - Enter a note. Using Notes in Service Requests on page 11-37.

   - Add an attachment. Adding Attachments to a Service Request on page 11-42.

   - Search the knowledge base for possible solutions to the customer problem. Searching the Knowledge Base and Suggesting Solutions on page 11-43.

- Add or change customer and employee contacts. See Creating and Updating New Contacts for a Service Request on page 11-49.

- Select addresses and parties for billing and shipping. See Selecting Billing and Shipping Addresses on page 11-52.

- Create and manage the tasks required to resolve the service request. See Managing Service Request Tasks on page 14-1.

- Specify that the service request is a duplicate of an existing one. See Specifying One Service Request is a Duplicate of Another on page 11-58.

- Provide links to related service requests and to other documents such as invoices or maintenance plans. See Specifying Relationships to Other Service Requests and Objects on page 11-53.

- Charge customers for services. See Creating a Charge Line on page 20-9.

11.6 Entering the Incident Address or Location

Use this procedure to enter the incident address or location of the customer problem. You can either select the address from those already in your database or enter it as text. The incident address can be used as follows:

- As the entry point when logging a service request. The customer name appears in the list of values for addresses associated with customer sites. After an incident address is selected, customer information is back filled, if available.

- To filter item instances. You will see only instances that are located at the incident address within the Item Instance list of values.

- To dispatch field technicians. If there are any field service dispatch tasks for the service request, the incident address is used for dispatching field technicians.

- To enter a one time address. You can select the One Time Address check box and manually enter the address.

- To default the covered site, if there is no item instance.

> **Note 1:** The application supports global address formats. The context for the country selected in the incident address region of the Service Request header is passed to the Bill To and Ship To regions of the Contacts/Addresses tab.

> **Note 2:** Fields in the service request header may be hidden from view. If the Address field is not visible, click the Maximize or Minimize the Header button located at the top right of the window. This is the right-arrow button to the right of the Profile button.

To enter an incident address or location:

1. If the incident occurred at a postal address, then:

   a. Search for the address using the Address list of value (LOV). See Selecting an Incident Address Using the Address LOV on page 11-17.

   b. If you cannot find the incident address, then you can either:

      * Enter it as text. See Entering an Incident Address as Text on page 11-18.

      * Create it as a new address in the database.

        You will want to create a new address in the database if the address is a customer address your organization may wish to use in the future.

2. If the incident takes place at a location without a postal address, for example, if you must send an agent to GIS or GPS coordinates or to the intersection of two roads, then enter the address as text according to the procedure outlined in Entering an Incident Address as Text on page 11-18.

11.6.1 Selecting an Incident Address Using the Address LOV

Use this procedure to search for and select an incident address from addresses in your database.

To select an incident address:

1. Verify the One Time Address check box above the Address field is not selected.

2. Use the Address LOV to search for the address.

> **Note:** The list of values permits you to select any address in your database as the incident address.
>
> If the customer has been selected for the service request, the list of values shows only addresses associated with the customer or its related customers.

11.6.2 Entering an Incident Address as Text

Use this procedure to enter an incident address or location as text. Entering an address as free text, does not store the address in your database as a valid address. It does not appear in lists of values and is not available for any other business functions such as billing or shipping.

Prerequisites

Display the service request in the Service Request window.

To enter an incident address as text:

1. Select the One Time check box directly above the Address field.

2. Enter the address or location in the Address, City, State, Country, and other address fields.

   Additional fields for text addresses such as Cross Streets and Points of Interest are available using standard Oracle Forms applications folder tools.

   Note: Entering a location as free text, does not store the address in your database as a valid address. Any address you enter in this way does not appear in lists of values and is not available for any other business functions such as billing or shipping.

11.6.3 Understanding the Covered Site

The Covered Site field within the Subject tab determines the appropriate service contracts. If there is no item instance, it defaults to the incident address.

11.7 Searching For a Service Request

You can search for service requests by:

- One or more criteria

  This includes service request number, customer name, problem summary key words, note text, items, and tasks.

- By ranges of values

  You can search for all high-severity service requests you must respond to by the end of the month, for example.

You can also:

- Save search criteria

- Reuse a Saved Search

- Delete a Saved Search

11.7.1 Searching by One or More Criteria

Use this procedure to search for a service request by using one or more criteria, including service request number, customer name, problem summary key words, items, and tasks. If you enter multiple search criteria, all have to be satisfied by the service request.

To find a service request using one or more criteria:

1. Display the Search Service Request window by one of the following methods:

    - From the Navigator, navigate to Find Service Requests

    - If you already have the Service Request window open, click Find in the toolbar. This is the icon with a searchlight.

2. If you wish to search by key words in the service request problem summary or in related notes, then:

    a. In the Text Search region, select a search option:

        *   Any Word: Finds service requests with notes or problem summaries that contain any of the key words.

        *   All Words: Finds service requests with notes or problem summaries that contain all the key words in any order.

        *   Phrase: Finds service requests with notes or problem summaries that contain an exact match of the key words.

    b. Select either the Summary or the Notes check box or both, depending on what you wish to search.

    c. Enter the search terms in the Keywords field.

    > **Note:** You can only search service requests that have been indexed by the Service Request Synchronize Index concurrent program. Your administrator can set this program to run periodically. See the *Oracle TeleService Implementation Guide* for details.

3. You can search by any combination of the search parameters:

- To search by contact, select the contact type from the Type drop-down list before entering your search terms:

    * Number (application-generated reference number)

    * Last Name

    * First Name

    * Number

    * Phone number

    * Email address

        The Primary Only check box is selected by default, which means that only primary service request contacts will be searched for a match. If the check box is deselected, the system searches both primary and non-primary service request contacts.

- To search by customer, select the customer type from the Type drop-down list and make entries in any of the following fields:

    * Number (application-generated customer number)

    * Name

    * Account

    * Phone

    * Address

    * Country

    * Postal Code

        You can search for service requests by selecting a customer address from the Address list of values, or by providing the country and postal code of the customer. You must enter the country before entering the postal code.

- If you wish to search by inventory or installed base item or by contract, then make entries in the Subject region:

    * Item (inventory number)

    * Description

    * Instance

- * Serial number
- * System
- * Tag
- * Contract
- * Service
- * Inventory Org
- If you wish to search by service request attributes, then make entries in the Request region:
    - * Number (application-generated service request number)
    - * Type
    - * Status
- If you wish to search by service request ownership attributes, then make entries in the Request Owner region:
    - * Type
    - * Owner
    - * Group
- If you wish to search by task, then make entries in the Task region:
    - * Number (application-generated reference number)
    - * Status
    - * Type
    - * Owner Type
    - * Owner

        To search service requests by task owner, first select the Owner Type, which enables the Owner field, then select an owner from the associated list of values.
- If you wish to find service requests by the individual or group assigned tasks, then make entries in the Task Assignee region:
    - * Type
    - * Name

- If you wish to search by RMA, then make entries in the RMA region:

    * Number

- If you wish to search by the incident address attributes, then make entries in the Incident region:

    * Select One Time Address check box, if applicable.

    * Address

    * City

    * State

    * Country

    * Postal Code

        You can select an incident address from the list of values if the One Time Address check box is not selected. To search by a free format incident address, select the One Time Address check box and populate the Address, City, State, Country, or Postal Code fields.

        You can use the wildcard character % to search by partial address information. For example, to retrieve service requests with incident addresses on Oracle Parkway, enter %Oracle Parkway% in the Address field. If wildcards are not used, only service requests with an exact matching incident address will be returned.

- If you wish to conduct a text search of the service request summaries or notes, then make entries in the Text region:

    * Select a value from the Options drop-down, such as Any Word.

    * Select the Summary check box, if applicable.

    * Select the Notes check box, if applicable.

    * Enter Keywords.

4. Click Search to find matching service request(s) based on the parameters you have specified.

    The results of your search are displayed below in the Results region. You can sort the service requests by date, severity, and other columns by clicking on the column heading.

5. Select a service request and click Ok.

11.7.2 Searching Using Ranges of Values

Use this procedure to search for service requests using ranges of one or more criteria. For example, you can use this method to search for all service requests of a particular severity you must respond to by the end of the month.

To find a service request using ranges of values:

1. Display the Search Service Request window by one of the following methods:

   ■ From the Navigator, navigate to Find Service Requests

   ■ If you already have the Service Request window open, click Find in the toolbar. This is the icon with a searchlight.

2. Select the Advanced tab.

3. Define the logical condition(s) to be satisfied for identifying and retrieving service request(s). You can build your arguments around customer number, contact name, or severity level. To define an argument:

   a. Select the term.

   b. Select a logical operator.

   c. Select the value.

   Note: The AND operator is used in the background to create a complex argument if you define more than one condition. All the conditions must be satisfied.

   ---

4. Click **Search** to find matching service request(s) based on the arguments you specified.

11.7.3 Saving Search Criteria

Use this procedure to save your search criteria for reuse.

To save search criteria:

1. Display the Search Service Request window by one of the following methods:

   ■ From the Navigator, navigate to Find Service Requests

   ■ If you already have the Service Request window open, click Find in the toolbar. This is the icon with a searchlight.

2. Enter your search criteria, for example an item and a status.

3. Click Save Search.

   The Saved Search window appears.

4. In the Name field, enter a search name to help you identify the search criteria in the future.

5. Click Ok.

   Your search should be saved.

11.7.4 Reusing a Saved Search

Use this procedure to reuse a saved search.

To reuse a saved search:

1. Display the Search Service Request window by one of the following methods:

   - From the Navigator, navigate to Find Service Requests

   - If you already have the Service Request window open, click Find in the toolbar. This is the icon with a searchlight.

2. Select the saved search from the Saved Search drop-down.

3. Click Search.

   Search results appear in the Results region.

11.7.5 Deleting a Saved Search

Use this procedure to delete a saved search.

To delete a saved search:

1. Display the Search Service Request window by one of the following methods:

   - From the Navigator, navigate to Find Service Requests

   - If you already have the Service Request window open, click Find in the toolbar. This is the icon with a searchlight.

2. Select the saved search you wish to delete from the Saved Search drop-down.

3. Click Delete Saved Search.

   The saved search is deleted from the Saved Searches drop-down list.

11.8 Copying a Service Request

You can create a new service request by using the Copy Service Request function to copy the information from an existing service request.

To copy a service request:

1. Navigate to the Service Request window.

2. Display an existing service request.

3. From the Tools menu, select Copy Request.

   The Copy Service Request window appears.

4. You can change any of the defaulted information for the new request. This includes Type, Severity, Owner, Urgency, Customer, Account, and Summary.

5. From the Include region, select the check boxes corresponding to the information you wish to copy into the new service request.

   - Address: Bill-To

   - Address: Ship-To

   - Contact Information

     Note: Your administrator can make it mandatory to include a contact by setting a profile option. If this profile is set, the Contact Information field is checked and disabled.

   - Address: Covered Site

   - Address: Incident

   - Product Information

> **Note:** Changing the customer account can affect whether certain check boxes are enabled in the Include region. Depending on system validations, the following check boxes may be disabled if you change the customer account:
>
> - Address: Bill-To
> - Address: Ship-To
> - Address: Covered Site
> - Address: Incident
> - Product Information

6. If you wish to reference the new request to the original, then select the Create Reference Link.

    This option creates a link of type Refers to in the original and Reference for in the copy.

7. If you do not wish to create a link, then select the No Link radio button.

8. If you wish to designate the original as a duplicate of the new service request, then select the Create Duplicate Link.

    The application creates a Duplicate of link in the original and a link of type Original for in the copy.

9. If you wish to designate the original as the root cause of the new service request, then select Create Caused By Link.

    You will be able view this link in the Related Objects tab of the new service request.

10. Click Copy.

    The application creates and displays the new service request.

    > **Note 1:** Your administrator can make it mandatory to include a contact by setting a profile option. If the original service request does not include a contact, you will receive an error message stating that the service request cannot be copied because it does not have a contact.

Note 2: When you copy a service request:

- The status of the service request depends on setup.

- The incident date defaults to the system date.

11.9 Selecting a Customer for a Service Request

Use this procedure to select a customer in the Service Request window using a unique identifier. The list of these entry points includes the customer's name, account number, contract number, incident address, and the serial number of a piece of equipment recorded in the customer's installed base.

Prerequisites

The customer record must already exist in the database. If it does not then create it in the Contact Center.

To select a customer for a service request:

1. Navigate to Create Service Requests.

    The Service Request window appears.

2. Select a customer type using the Customer Type drop-down list:

    - Organization: if your customer is a business or organization

    - Person: your customer is a consumer.

    Your selection restricts the lists of values.

3. Search for and select the customer using the list of values in any of the following entry points located in the Service Request window header:

    Note: If you with to search for a customer using a contact, you cannot search by employee contacts.

Entry Point	Description
Account	Any customer account
Contact Email	Any customer contact e-mail address

Entry Point	Description
Contact Last Name	Customer contact's last name
Contact Number	Customer contact's identifying number in the Oracle E-Business Suite
Contact Phone	Any customer contact phone
Contract	Any contract with the customer
Customer Email	Any customer e-mail
Customer Name	Customer name
Customer Number	Customer's identifying number in the Oracle E-Business Suite
Customer Phone	Any customer phone number
Instance	Oracle Install Base instance number
Incident Address	Location or address where the service issue has occurred,
Serial Number	Serial number of an item in Oracle Install Base.
System	Number of a system in Oracle Install Base.
Contact Address	Customer contact's address
Customer Address	Customer address
Tag	Oracle Install Base tag

> **Note:** Fields in the service request header may be hidden from view. If the field you are looking for is not visible, click the Maximize or Minimize the Header button located at the top right of the window. This is the right-arrow button to the right of the Profile button.

11.10 Viewing a Profile of Your Customer

Use this procedure to view key information about a customer, such as the numbers of high priority and escalated service requests or the number of expiring contracts. A customer profile provides you with a summary of key customer indicators set up

by your administrator. You can view a list of the individual items that make up each indicator and to access any of the listed items.

Prerequisites

Your organization must define customer profiles before they can be viewed in a service request. For more information, refer to the *Oracle TeleService Implementation Guide.*

To view a customer profile:

1. Navigate to the Service Request window.

2. Create or display a service request.

3. Click **Profile.**

    The Profile window displays the predefined key indicators for this customer.

4. The profile information was last refreshed at the time and date listed in the window. If you wish to update the information, then click Refresh.

5. To view a list of any of the summarized items, double-click on any of the indicators. For example, double-clicking on "Escalated SRs", displays the a list showing all escalated service requests for the selected customer.

6. To view the details of an individual item on the list, double-click on it. The item opens in an application window. For example, clicking on a service request opens that service request in the Service Request window.

11.11 Viewing Item Details and Entering the Item in the Service Request

Use this procedure to view details of an item in inventory or installed base and to enter it into the service request.

To view item details:

1. Navigate to the Service Request window.

2. Display the customer. See Selecting a Customer for a Service Request on page 11-27.

3. To enter an inventory item, use the Item or Desc lists of values (LOV) in the header. The Item LOV permits you to search by inventory number; the Desc LOV by the item description.

4. To enter an item registered in the Oracle Install Base, use the lists of values in the serial number, the instance number, or the system number fields in the Service Request window header. You can also search for an installed base item by clicking Find to the right of the Instance field. This is the button with a flashlight icon. See Searching for and Displaying Installed Base Items on page 11-32.

   Information about the item displays on the Subject tab.

5. If you wish to view or change a item's configuration using Oracle Install Base, click Instance Configuration.

   The item details display in the Item Instance Configuration page in your browser window.

   > **Note:** You can also register an instance or update instance detail from the Subject tab, by clicking Register Instance or Instance Detail respectively.

6. Click Save on the toolbar if you wish to enter this item into the service request.

11.12 Checking a Customer's Contract Coverage

Use this procedure check a customer's entitlements.

Prerequisites

Your organization must have all of the customer items, contracts, and coverages defined before they can be viewed in a service request.

To view customer's contract coverage:

1. Navigate to the Service Request window.

2. Display the customer. See Selecting a Customer for a Service Request on page 11-27.

3. If you wish to check coverage for an item in inventory, then use the Item or Desc lists of values (LOV) in the header to enter it. The Item LOV makes it possible for you to search by inventory number; the Desc LOV by description.

4. If you wish to view the customer's coverage for an item in the installed base, then enter the serial number, the instance number, or the system number of the item in the Service Request window header. If you wish to search for the item

instead, then click Find to the right of Instance field. This is the button with a flashlight icon. See Searching for and Displaying Installed Base Items on page 11-32.

5. If a customer has multiple accounts, then enter the account number in the Acct Num field in the Customer region of the Service Request header. This entry is important if a customer chooses different contracts to cover different accounts.

6. Select the Subject tab.

7. To search only contracts in effect, make sure the Entitled Contracts radio button is selected. If you wish to search all contracts, including contracts that are not valid for entitlement, such as terminated contracts and contracts that are active but have not yet been approved, then select the All Contracts radio button.

8. Click Get Contracts.

Get contracts displays a list of contracts in order of the respond by time. In other words, the contract that has the fastest respond by time appears at the top.

The contracts are displayed in the Contracts region of the tab. Warranties show a check mark in the Warranty check box.

The Contracts regions shows two contracts at a time. You can scroll to view additional contracts using the scroll bar to the right.

9. If you wish to view coverage details for any contract, then select the contract and click View Details (the button with the eyeglasses icon to the right of the Coverage column).

Details of the contract appear in the Service Contracts Coverage window. These include the hours of coverage, the resolution times, and billing rates.

10. If you wish to apply one of the contracts to the service request, then select it using the check box on the left of the desired row.

Selecting a contract populates the service request with information designed to help your organization meet its contractual obligations. This may include the required time by which your organization must resolve the issue (displayed in the Resolution By field), and the preferred resources who are to help the customer.

> **Note:** You can view all contracts, both valid and invalid for entitlement. However, a contract that is not valid for entitlement cannot be selected for a service request.

When you use the Get Contracts function, the system automatically selects an entitled contract with the fastest respond by time. The selected contract has a check mark to the left of the record. Values from the selected contract appear in the Contract, Coverage, and Service fields within the Service Request header.

Note: Your administrator can setup a default service level feature that defines the parameters for a standard service level agreement, applicable to all customers not covered by a contract.

When a service request is created, the Respond By and Resolve By dates default based on the setup. You can override these dates within the Workbench tab.

If a contract is selected for the service request, the Respond By and Resolve By dates will be based on the contract coverage.

For more information on setting up default service level feature, refer to the *Oracle TeleService Implementation Guide*.

11.13 Searching for and Displaying Installed Base Items

Use this procedure to search for and display an item in the customer's or employee's installed base. The application searches through items tracked by both the Oracle Install Base and Oracle Enterprise Install Base.

To search for and display installed base items:

1. Navigate to the Service Request window.

2. If you wish to narrow down the search by customer, then display the customer. See Selecting a Customer for a Service Request on page 11-27.

3. Click Find to the right of the Instance field in the service request header. This is the button with a flashlight icon.

   The Search Installed Base window appears.

Note: If an incident address is populated on the service request, this address defaults into the Current Address field in the Search Installed Base window. In addition, the Item Instance list of values includes only the item instances that are currently located at the same location as the incident address.

---

4. If you wish to search using one or more search terms, then select the Basic tab and enter one or more search terms in the Product Information region.

   a. Order Num

   b. Order Date

   c. Sales PO Num

   d. Item

   e. Description

   f. Serial

   g. Lot Num

   h. Item Instance

   i. Instance Name

   j. System

   k. Tag

   l. Current Address

5. If you wish to search for an installed base item by range of values for order number, revision, serial number, or serviced status, then:

   a. Select the Advanced tab.

   b. Define one or more logical condition for the search by entering a term, a logical operator, and a value. For example: `Order Number > 2001.`

   Note: The AND operator is used in the background to create a complex argument if you define more than one condition. All the conditions must be satisfied.

   ---

6. Click Search.

   The installed base items display at the bottom of the window.

7. Select an item you wish to enter in the Service Request window, and click OK or repeat the search with different criteria.

   You can review a list of eligible contracts for the item instance currently selected in the search results table. You can also select one of the contracts. The item

instance and contract that you select will appear in the Service Request header and Subject tab.

11.14 Assigning Ownership of Service Requests

This group of topic outlines the various methods you can use to assign ownership of a service request. It covers.

- Ownership Overview on page 11-34.

- Assigning Service Request Ownership Manually on page 11-35

- Assigning Ownership Assisted by Oracle Assignment Manager on page 11-35

- Assigning Service Request Ownership Automatically on page 11-37

11.14.1 Ownership Overview

A service request owner coordinates the satisfactory resolution of a customer's service request. Service request ownership is unrelated to task ownership, so assigning a service request does not assign any of the related tasks.

You can assign service request ownership to any group or individual that has access to the Service Request Type defined in the Oracle Resource Manager. Which ownership you decide to assign depends on your organization's business practices. Some organizations may prefer to assign work to the group and permit individual agents to take ownership themselves based on their work load and availability; other organizations may prefer to assign service requests to individuals directly.

Assigning a service request to a group or an individual lists that service request in that individual's and group's work queue in the Oracle Universal Work Queue under the Service Request heading:

- All members of a group see a service request assigned to that group under the Group Owned heading regardless whether that service request has also been assigned to an individual in that group.

- An individual who has been assigned a service request, sees the service request both under My Service Request and Group Owned headings.

- Unassigned service requests do not appear in the Universal Work Queue at all.

Your administrator can set up automatic notifications to alert agents when a service request has been added to their work queue. For more information see Setting Up Notifications in the *Oracle TeleService Implementation Guide*.

You can assign service request ownership either to groups or to individuals within your organization in one of three ways:

- Manually, using the lists of values on the Service Request window

- Assisted by Oracle Assignment Manager

  This method makes it possible for you to search for resources based on individual resource skills, availability and service territories.

- Automatically, using the automatic assignment and work-load balancing feature of Oracle TeleService.

11.14.2 Assigning Service Request Ownership Manually:

You can assign service request ownership to a group or an individual using the Group and Owner lists of values located in the right-hand column of the service request header. A manual entry prevents the automatic assignment process for assigning ownership.

Selecting a group owner first restricts the list of values of individual owners to the members of that group.

Prerequisites
Owners must be set up resources in the Oracle Resource Manager.

To assign a service request using the lists of values:
1. Display the service request you wish to assign in the Service Request window.

2. Use the Group list of values (LOV) to assign the group.

3. If you wish to assign the service request to a particular individual in the group, then use the Owner LOV.

11.14.3 Assigning Ownership Assisted by Oracle Assignment Manager

You can use the Oracle Assignment Manager to suggest appropriate resources by displaying:

- Preferred Resources in Oracle Service Contracts and Oracle Install Base

- Individuals assigned to appropriate service territories.

To assign service requests using the Oracle Assignment Manager:

1. Display the service request you wish to assign in the Service Request window.

2. If you wish to assign the group owner, then click Group Owner. This is the button immediately to the right of the Group field.

3. If you wish to assign the individual and group owner, then click Assign Owner. This is the button immediately to the right of the Owner field.

> **Note:** If the Assign Owner or Assign Group buttons are disabled, then click in the Group or Owner fields first to enable them.

The Assignment Manger window appears.

4. Choose a Selection Mode, either Assisted or Unassisted.

   The mode you select impacts the fields that display in the Selection Criterion region.

   a. For Assisted mode, use the Selection Criterion region to choose the search criteria that the Oracle Assignment Manager uses to suggest possible owners. You can select the following check boxes:

      – Preferred Resources (Contracts or Install Base)

      – Territories

      – Resource Availability

      – Filter Excluded Resource

   > **Note:** If you use the Assisted Mode and decide to use service territories as a search criteria, you will also need to select additional attributes related to territories such as, area code, state, postal code, country, city, or customer name.

   b. For Unassisted mode, use the Selection Criterion region to enter the resource criteria that the Oracle Assignment Manager uses to suggest possible owners:

      – Enter a Resource Name. Enter at least three characters to make a selection or %%% if you want to search all.

– Select a Resource Type from the list of values.

5. Click Search.

    The application returns the list of qualified resources in the grid on the right side of the window. The qualified resources are filtered by security.

    If no resources are suggested, then repeat the search with different search criteria.

6. Select a resource from the list.

7. Click OK.

11.14.4 Assigning Service Request Ownership Automatically

If your organization has implemented automatic assignment of service requests, you can have the application assign service request ownership to groups and individuals automatically.

The automatic assignment process starts immediately after a service request is created. Service requests that have been updated are assigned by a concurrent program your administrator must set to run on a regular basis.

Automatic assignment takes the skills and work load of each individual resource into account when identifying the optimal owner. For more information, refer to the *Oracle TeleService Implementation Guide*.

To assign ownership automatically:

1. Display the service request you wish to assign in the Service Request window.

2. If you wish the application to automatically assign ownership to a group and an individual, then delete any entries in the Owner and Group fields.

3. If you wish the application to assign the service request to an individual within a group, then enter the Group and leave the Owner field blank.

11.15 Using Notes in Service Requests

This topic describes how to view and create notes for service requests. It covers:

■   About Notes in Service Requests on page 11-38

■   Viewing a Summary Listing of Notes on page 11-38

■   Creating a Note for a Service Request on page 11-39

■ Searching for Notes by Text on page 11-40

11.15.1 About Notes in Service Requests

You can use notes to:

■ Keep notes that can be viewed by all agents working to resolve the customer problem.

■ Keep personal notes.

■ Enter additional search terms for knowledge base searches.

■ Communicate with customers who use Oracle iSupport to review their service requests. See Communicating Through the Web on page 18-29 for details.

After you save a note you cannot edit or delete it, but you can change its type and status. All notes you create in a service request are automatically linked to the service request, so they are not visible to agents viewing the customer record in the contact center.

Who gets to view notes in a service request is controlled by the note's status:

■ Private - Only the creator of the note can view the note.

■ Public - All agents with access to the service request can view the note.

■ Publish - All agents with access to the service request can view the note as well as customers who review the service request using Oracle iSupport.

If you print a service request, you have the option of selecting which note status should be included on the printout.

11.15.2 Viewing a Summary Listing of Notes

Use this procedure to view a summary listing of notes.

To view a summary listing of notes:

1. Navigate to the Service Request window.

2. Display an existing service request.

3. Select the Workbench tab.

   If notes exist, a listing of notes appears in the summary table.

4. To filter notes by an object type such as a service request task, select an object type from the View By drop down list.

If notes exist, a listing of notes appears in the summary table.

5. To view notes created within a specific date range:

    a. Select a From date.

    b. Select a To date.

    c. Click Refresh.

6. If the note has additional details, the detail column in the summary tab will be checked with a green check mark. To view the additional note details, click on the Note Details button.

    The Note Detail window appears.

7. To create a print friendly view of the notes summary, select Print Friendly.

    The Notes page appears in a browser.

11.15.3 Creating a Note for a Service Request

Use this procedure to create a note for a service request.

To create a note:

1. Navigate to the Service Request window.

2. Create a service request or display an existing service request.

3. Select the Workbench tab.

4. Click New.

5. Select a note type using the Type list of values (LOV). If you wish to use the note you enter to search for possible solutions, then make sure you select a note type that is mapped to an Oracle Knowledge Base Type. By default the mapped types are: Symptom, Cause, Action, Changes, and Objective.

    Using notes as extra search terms makes it possible for you to make your knowledge base search more specific. For example, when you create a note of type Symptom, the application uses that note to search only knowledge base statements of the same type.

6. Select a status for the note from the Status drop-down list:

    ■ Private: Keeps the note private

    ■ Public: Makes the note available for viewing to others in your organization

- Publish: Makes the note available for viewing to your organization and to customers

7. Enter a short text in the Note field.

> **Note:** You can also enter a short note while viewing notes in the Log Notes window which is available from the Workbench tab by clicking Log and Notes. You can access this window by clicking Log and Notes in the Service Request header as well.
>
> To create a note in the Log Notes window, click the down arrow key from the keyboard.

8. If you want to enter additional note text, then:

> **Note:** The additional text you enter in the Note Details window is not visible in the notes log or notes summaries, and is not used by the application for knowledge base solution searches. You cannot search on this text.

a. Click Details.

The Note Details window appears.

b. Enter text of up to 32,000 characters in length.

c. Click Save on the toolbar.

d. Click OK to return to the Notes tab.

9. Click Save on the toolbar.

The note you created appears in the in the Notes region.

> **Note:** When creating a note in the Log Notes window, click the OK button to save the new note.

The note you created appears in the in the Notes and Knowledge region.

11.15.4 Searching for Notes by Text

Use this procedure to search for a note by text.

> **Note:** You cannot search for text entered in the Note Detail window.

To search for notes by text:

1. If you are searching for a specific note in a service request displayed in the Service Request window, then:

    a. Select the Workbench tab.

        All notes are listed in the Notes region on the right of the tab.

    b. Right-click in the Description field and select Find in Table from the pop-up menu.

    c. Enter the term you are searching for in the Find What field of the find window, select any options, and click Find.

2. If you wish to search notes in all service requests, then:

    a. Navigate to Service Requests > Find Service Requests or click Find in the toolbar.

        The Search Service Request window appears.

    b. In the Text Search region of the Basic tab, select the search method using the Options drop-down list. Available options are:

        *   Any Word: Returns service requests with notes containing any of the terms you enter

        *   All Words: Returns service requests with notes containing all of the terms you enter.

        *   Phrase: Returns service requests with notes containing the exact phrase you enter.

    c. Select the Notes check box.

    d. Enter the search term(s) in the Keywords field.

    e. Click Search.

        The list of service requests that with matching note information appears in the results region.

11.16 Adding Attachments to a Service Request

Use this procedure to an add attachment to a service request.

To add an attachment to a service request:

1. Display the service request in the Service Request window.

2. Select the Attachments icon in the toolbar.

    The Attachments window appears.

3. Enter a numeric value in the Seq field.

4. Select a Category from the list of values.

5. Enter a Description of the attachment.

6. Select a Data Type. You can attach a web page, a document, or a short text message.

    a. Web Page: opens the Source tab, enter a URL in the File or URL field.

    b. File: launches the Upload a File page. Click Browse to choose a file from your local directory structure, then Click OK.

    c. Short Text: opens a yellow box at the bottom of the window where you can enter a short text message.

7. Optionally, you can attach an existing document by selecting Document Catalog.

    The Document Catalog window appears.

    a. Enter criteria to find an existing document.

    b. Click Find.

        A list of documents appears in the Documents region.

    c. Select a document

    d. Select Preview to review the document.

    e. Select Attach1 to add the document as an attachment.

8. Click the Save icon in the toolbar

9. Close the Attachments window.

11.17 Searching the Knowledge Base and Suggesting Solutions

This topic explains how you can search your organization's knowledge base for a solution to the problem you have described in a service request and suggest possible solutions to other agents and customers.

This topic covers:

- About Searching the Knowledge Base from a Service Request on page 11-43
- Searching the Knowledge Base on page 11-44
- Viewing Suggested Solutions for a Service Request on page 11-45

11.17.1 About Searching the Knowledge Base from a Service Request

When you initiate a knowledge base search from the Workbench tab of the Service Request window, the application uses the following information you have entered as search criteria:

- Keywords and phrases you enter as the problem summary
- Item or installed base item you have entered in the service request
- Any notes of types that are mapped to Oracle Knowledge Management. By default these note types are: Symptom, Cause, Action, Changes, and Objective.
- When performing a knowledge search, solutions and the existing service requests are searched for potential matches.

Your search lists all potential solutions in a browser window. You can view each solution and indicate whether it is useful, not useful, or potentially useful by answering the question "Is this solution useful in resolving your question or problem?".

Answering Yes, No, or Maybe, automatically links the solution to the service request. It appears in the Solutions region of the tab.

If your organization has implemented notifications, your customer can be automatically notified by e-mail whenever an agent links a solution to the service request.

The answer you give translates into a value in the Outcome field as follows:

Knowledge Base Answer	Oracle TeleService Outcome
No	Not Useful
Maybe	Possibly Useful
Yes	Useful

If you answer Maybe, the solution is also automatically listed as a potential solution to a customer reviewing the service request on their Oracle iSupport Web portal. For additional information on searching and searching options see the *Oracle Knowledge Management User Guide*.

> **Note:** If an iSupport user searches the knowledge base for solutions before creating a service request and cannot find a solution, and then decides to log a service request; each of the solutions that the iSupport user views is automatically linked to the service request.

11.17.2 Searching the Knowledge Base

Use this procedure to search the knowledge base for solutions to the service request problem.

Prerequisites

- Oracle Knowledge Management must be implemented.
- You must create a service request first.

To search the knowledge base and suggest a solution:

1. Display the service request in the Service Request window.

2. Select the Workbench tab.

3. Enter any additional information that may help you find the solution:

   - Item or installed base item
   - Additional search terms in the Problem Summary field
   - Additional notes.

4. Click Search Knowledge.

The Oracle Knowledge Base's Simple Search Result page opens in a browser window displaying the possible solutions to the problem in the Results region.

5. To view any solution:

   a. Select the Title link.

      The solution displays in the Solution Detail page.

   b. If you are troubleshooting the problem with the customer, then indicate the usefulness of the solution by clicking one of the buttons below the question "Is this solution useful in resolving your question or problem?" at the bottom of the page. Any answer links the solution to the service request and lists it in the Solutions region of the Workbench tab:

      * Yes: Indicates the solution helped you to solve the problem. This selection increases the ranking of a solution on subsequent searches.

      * No: The solution did not help you. This decreases the ranking of this solution on subsequent searches.

      * Maybe: You or the customer has not tried the solution, but you want to suggest it as a potential solution.

        Clicking this button makes the solution visible to the customer on the Oracle iSupport Web portal.

        If your organization has set up the appropriate automatic e-mail notifications, the customer contacts for the service request will receive e-mails alerting them of the suggestion.

6. To find service requests that may potentially match, select the Service Request tab in the Knowledge Management user interface.

   Note: You can also search the knowledge base without entering a service request. For more details of different search methods please see the *Oracle Knowledge Base User Guide*.

11.17.3 Viewing Suggested Solutions for a Service Request

Use this procedure to view suggested knowledge base items linked to service requests.

To view suggested solutions for a service request:

1. Display the service request in the Service Request window.

2. Select the Workbench tab.

   The Solutions region lists knowledge base solutions attached to the service request.

   The Solutions regions provides information related to the solution within Oracle Knowledge Management:

   - Outcome: indicates the solution has been tried and proven useful to agents. The possible values are:
     - Not Useful: Tried and not useful.
     - Possibly Useful: Not tried yet, but possibly useful.
     - Useful: Tried and useful

   - Title: lists the solution title.

   - Type: indicates the solution type.

   - Number: indicates the solution number.

   - Visibility: indicates whether the solution can be viewed by customers in iSupport.

   - Date Linked: indicates the date in which the solution was linked to the service request.

3. Click Refresh to make sure that you are viewing the latest items.

4. To view a solution, select the eye glasses icon next to the solution you wish to view in the list.

   This launches the Solution Detail page within Oracle Knowledge Management.

5. If you wish to unlink the solution from the service request:

   a. Select the solution.

   b. Click Unlink Solution.

   The Solution region refreshes and the solution no longer appears.

   Note: You can view an audit trail in the service request log that shows when a solution has been linked or unlinked to a service request. The Log Notes window shows the solution number, type, title, and statements.

11.18 Viewing the Service Request Log

Use this procedure to view a chronological list of all activities, tasks, and notes for a service request, as well as all changes to the audited fields, and all linked knowledge solutions.

Prerequisites

You must save the service request before you can view the log.

To view the customer service request log:

1. Navigate to the Service Request window and display an existing service request.

2. Select the Log and Notes button.

    The Log Notes window appears.

    > **Note:**   You can also access this window from the Log and Notes button within the Workbench tab.

3. Select one of the following check boxes to display the type of information you want to view:

    ■   All: displays all activities including:

    –   Severity

    –   Type

    –   Status

    –   Urgency

    –   Owner

    –   Group Owner

    –   Expected Resolution Date

    –   Task Description

    –   Task Status

    –   Task Type

    –   Note Type

- – Activity Description
- – Solution Summary
- – Solution Name
- ■ Audit: tracks changes to the following:
  - – Severity
  - – Type
  - – Status
  - – Urgency
  - – Owner
  - – Group Owner
  - – Expected Resolution Date
- ■ Notes: displays all notes.
- ■ Knowledge: displays knowledge documents linked to this service request.
- ■ Activity: displays all interactions
- ■ Task: displays all tasks.

4. Use the Sort drop-down to determine the order in which the log should display detail.

5. Click Refresh to view the selected items.

6. To add a note, scroll to the lower region of the form.

   a. Select a Type:

   b. Select a Visibility.

   c. Enter a Description.

   d. Click the Ok button.

7. If you want to print the activity shown in the log, click Print Friendly Format to display the in a browser window.

8. Click Ok to close the Log and Notes window.

> **Note:**   You can also access the service request log from the Request Audit window by choosing the Tools1 menu and selecting Request Audit. See Viewing the History of Changes Made in a Service Request on page 19-4.

11.19 Creating and Updating New Contacts for a Service Request

You can create contacts and update contact information from the Service Request form. This topic covers:

- Creating a New Contact for a Service Request on page 11-49

- Updating or Adding a Contact for a Service Request on page 11-50

- Editing Existing Contact Information from the Service Request Header on page 11-51

11.19.1 Creating a New Contact for a Service Request

Use the following procedure to create a new contact for a service request.

To create a new contact for a service request:

1. Navigate to the Service Request window.

2. Display the customer. See Selecting a Customer for a Service Request on page 11-27.

3. Click the Create Contact button. This button is to the right of the Last field in the left hand region of the Service Request header.

    The Create Contact window appears.

4. In the Contact Info region, enter the following:

    a. Optionally, select the contact's title from the Title drop-down list, such as Mr.

    a. Enter the contact's last name in the Last field.

    b. Enter the contact's first name in the First field.

    c. Select a relationship to the customer from the Relationship list of values, such as Employee of.

    d. Enter the contact's phone number in the Phone field.

    e. Classify the phone number by selecting a value from the Type drop-down list, such as Mobile.

    f. Optionally, Enter an e-mail address in the Email field.

    g. Optionally, enter a site name for the contact in the Site Name field.

    h. Optionally, select and classify what the contact's listed address will be used for, such as, Collateral Mail To.

    i. Optionally, update the address information that defaults from the customer:

        – Select an address from the Address list of values. You can bring up the list of values by clicking the button to the right of the Address field. You may also;

        – Update the address by clicking the ellipses button next to the Address field and invoking the Address window.

5. Click Save.

A note window appears, indicating the Contact has been created and assigned a Party Number.

6. Click OK.

The contact information is populated in the Service Request. You should also see the party number in the Number field within the Contact region of the Service Request header.

11.19.2 Updating or Adding a Contact for a Service Request

Use the following procedure to update or add a contact for a service request.

Prerequisites

Contacts must be defined before they can be associated with service requests.

To update or add contact information for a service request:

1. Navigate to the Service Request window and create a service request or display an existing service request.

2. Select the Contacts / Addresses tab.

3. Optionally, update information in the Contacts region as desired. For example select a new Phone number from the value list of values.

    ■ If you make changes, click the Save icon in the toolbar.

4. Optionally, select the Create Edit Contact button to the right of the contact line.

   The Create Contact window appears.

   a. Update information in the Contact region as desired. For example, enter a new e-mail address.

   b. Click the Save button.

   Note: Your administrator will need to set a profile option to enable the Create Contact icon in the Service Request window header as well as the Contact/Addresses tab.

   ---

5. Optionally, if you wish to add a new contact line within the Contacts/Addresses tab:

   a. Select the New icon from the toolbar.

   b. Select the Primary check box if this contact should be the primary contact on the service request.

   c. Select the contact information in the Contacts region.

6. Click the Save icon.

11.19.3 Editing Existing Contact Information from the Service Request Header

Use the following procedure to edit existing contact information from the Service Request header.

Note: Your administrator will need to set a profile option to enable the Edit Contact icon in the Service Request window header as well as the Contact/Addresses tab.

To edit existing contact information from the Service Request header:

1. Navigate to the Service Request window.

2. Display the customer and contact. See Selecting a Customer for a Service Request on page 11-27.

3. Select the icon to the right of the Last field in the Contact region.

The Create Contact window appears, populated with the customer and contact information from the Service Request header.

a. Update information in the Contact region as desired. For example, enter a new e-mail address.

b. Click the Save button.

The Create Contact window closes and you are returned to the Service Request window.

11.20 Selecting Billing and Shipping Addresses

Use this procedure to select the parties and addresses for billing, and shipping. You can enter different parties for billing, and shipping.

The entries you make here are automatically defaulted for the charge lines for this service request. You can select individual addresses for each charge line in the Bill To and Ship To address subtabs of the Charges tab. See Creating a Charge Line on page 20-9.

Prerequisites

You cannot enter new addresses in the Service Request window, so you must create them first in the Contact Center.

To select a customer address:

1. Display a service request in the Service Request window.

2. Select the Contacts / Addresses tab.

3. Go to the appropriate region in the Addresses tab: Bill To, Ship To.

4. To select a different party or address for billing and shipping:

   a. Select the appropriate party from the Customer list of values. The Customer list of values displays all related customers, filtered by the customer type selected in the service request header.

   b. Select an address from the list of values.

5. Click Save in the toolbar.

11.21 Managing Service Request Tasks in the Service Request Window

For information on managing service request tasks in the service request window, refer to Managing Service Request Tasks on page 14-1.

11.22 Viewing Interactions and Activities

Use this procedure to view the interactions and activities related to the service request.

An interaction comprises all the activities between the time agents receive a call or start an interaction until they end the interaction or wrap up the call. An interaction can have multiple activities. Some activities, including service request updates, the creation of associated tasks, and the sending of e-mails, are automatically recorded by the application. Agents can add information on other activities, such as customer meetings and visits, in the Call Wrapup window.

> **Note:** When the system sends an automatic notification, it creates an interaction between the customer contact and the Automated Service Request System. You can view these interactions in the Interactions tab.

To view customer interactions and activities:

1. Navigate to the Service Request window and display an existing service request.

2. Select the Interactions tab. The Interaction tab lists the interactions your organization has had with the customer regarding the service request, and tracks both the contact and agent who handled the interaction.

3. To view the activities for an interaction, select it in the upper half of the tab.

4. If an activity involved the sending of an e-mail, then you can view the e-mail sent by double clicking on the activity of type "Composed a new outbound e-mail." See Viewing E-mails Sent Regarding Specific Service Requests on page 18-25 for a description of how to find and view sent e-mails.

11.23 Specifying Relationships to Other Service Requests and Objects

This group of topics describes how you can record the relationship of the service request you are working on to another service requests or to other Oracle

E-Business Suite objects, such as equipment maintenance plans. Recording a relationship makes it possible for other agents to view the related information with the click of a mouse.

This topic covers:

11.23.1 About Service Request Relationships

You can use relationships to indicate, for example, that one service request is a duplicate of the other, that one is the cause of another, or that it contains relevant information for the resolution of another. For each service request, you can indicate multiple relationships to other service requests and Oracle E-Business Suite objects, such as maintenance plans, invoices, orders, and the like.

> **Note:**   All Oracle E-Business Suite object types other than service requests must be enabled by your administrator.

You can specify six types of relationship types of one service request to another:

- Caused by

- Root cause of

- Duplicate of

- Original for

- Reference for

- Refers to

You can only use the last two relationship types to link service requests to other E-Business Suite objects:

- Reference for

- Refers to

Because a relationship between two objects is reciprocal, the relationships come in pairs. When you specify a relationship, the application automatically supplies the reciprocal relationship on the object you are linking to:

- Caused by / Root cause of

- Duplicate of / Original for

- Reference for / Refers to

For example, if you specify that service request A refers to service request B, then the application supplies the "Reference for" link for B. An agent viewing B can see the link to A and can open A with a couple of clicks of the mouse.

In addition to supplying the reciprocal link, two of the relationship pairs also affect the status of one or both of the service requests:

- Caused by / Root cause of

- Duplicate of / Original for

For example, if you specify that requests A and B are caused by service request C, then closing C closes A and B as well.

> **Note:** Status propagation is available only for linked service requests, not to other E-Business Suite objects.

The breakdown of a major system can sometimes cause multiple customer contacts to report the same problem. The status propagation permits the service organization to deal with all the duplicate service requests all at the same time.

The following table explains the three most frequently used relationship types. The Action column explains the relationship and describes the actions the application takes, including changes in service request status and any reciprocal links created automatically. The Example column gives examples of how these relationships can be used in practice.

Relationship	Action	Example
Caused by	Linking service request A to service request B using a "Caused by" relationship indicates that A is caused by B. The application: ■ Sets the status of A to "Waiting". ■ Creates the reciprocal link "Root Cause of" for B. When B is set to the status of "Closed", then the status of A is automatically set to "Clear". If multiple service requests are "Caused by" B, then all are set to "Clear".	<u>Problem:</u> A customer contact calls to say his e-mail is not working. The support agent discovers that the administrator has already logged a service request to track this problem. The contact's e-mail is not working because the e-mail server is down. <u>Resolution:</u> The agent creates a "Caused by" link between the contact's service request and the service request already logged for the e-mail server problem. The application automatically sets the status of the contact's service request to "Waiting". When the administrator resolves the e-mail server failure and closes the server problem service request, then the application automatically updates the contact's service request status to "Clear".
Duplicate of	Linking service request A to service request B with the "Duplicate of" relationship indicates that A is a duplicate of B. The application automatically: ■ Creates an "Original for" link from B to A. ■ Changes the status of A to "Closed" with the resolution code of "Closed as Duplicate".	All call center agents have been notified of the e-mail outage. Subsequently, an employee logs a ticket to report the e-mail outage. The agent who is assigned to work on the service request identifies it a duplicate and enters the "Duplicate of" link. The application automatically closes the employee's service request with the resolution code of "Closed as Duplicate" and a reference to the service request already logged for the e-mail outage.
Refers to	If service request A "Refers to" service request or document B, this means that B has information relevant to A. The application automatically creates the reciprocal "Reference for" relationship from B to A provided both documents are service requests. You can use this type of relationship for linking a service request to another object, such as a maintenance plan.	An agent working on a service request remembers that he created a similar service request for another customer. By creating a link to that old service request, he makes it possible for others to refer to it.

For a detailed explanation of the service request relationships, please see Setting Up Service Request Linking Through Relationships in the *Oracle TeleService Implementation Guide*.

11.23.2 Specifying a Relationship to Another Service Request or Object

Use this procedure to specify a relationship between a service request and another service request or another Oracle E-Business Suite object. If you wish to indicate that one service request is a duplicate of another, then instead follow the procedure described in Specifying One Service Request is a Duplicate of Another on page 11-58.

Prerequisites

You must know the identifying number for the object you are linking to. If you wish to specify a relationship to another service request, for example, then you must know the service request number. See Searching For a Service Request on page 11-18 for information on searching for service requests.

Examples of other identifying numbers include a purchase order number or an invoice number.

To specify a relationship link to another object:

1. Navigate to the Service Request window and display a service request.

2. Select the Related Objects tab.

3. If you wish to record a relationship to another service request, then in the Related Service requests region:

   a. Select the relationship from the Relationship list of values (LOV).

   b. Select the service request number using the Number LOV.

4. If you wish to record a relationship with another Oracle E-Business Suite object, then in the Other Related Objects region:

   a. Select the relationship from the Relationship list of values (LOV).

   b. Select the identifying number using the Number LOV.

5. Click Save in the toolbar.

> **Note:** in order to refresh the data on this tab, you must click on another tab and then return to this tab.

11.23.3 Specifying One Service Request is a Duplicate of Another

Use this procedure to specify that one service request is a duplicate of another.

Note: You can specify that service request A is a duplicate of service request B only if service request A has no existing relationship links of type "Duplicate of", "Original for", "Root Cause of", and "Caused by".

This is because:

- A service request can be a duplicate of only one original.

- Service requests that are originals for others cannot be chained.

- Service requests that are the cause of or caused by others will cause logical errors in the status propagation.

Prerequisites

You must know the service request number of the second service request. See Searching For a Service Request on page 11-18 for information on searching for service requests.

To specify a service request is a duplicate of another:

1. Navigate to the Service Request window and display a service request.

2. Select the Related Objects tab.

3. In the Service Request region, select "Duplicate of" from the Relationship list of values (LOV).

4. Select the service request number using the Number LOV.

5. Click Save on the toolbar.

   Specifying that service request A is a duplicate of B, automatically creates an "Original for" link from B to A and changes the status of A to "Closed" with the resolution code "Closed as Duplicate".

11.23.4 Viewing Linked Service Requests and Other Objects

Use this procedure to view service requests and other objects with a relationship to a service request.

To view linked service requests and other objects:

1. Navigate to the Service Request window and display a service request.

2. Select the Related Objects tab.

3. Click **View**. This is the button with the glasses icon located on the right.

   The selected object opens in a new window.

   > **Note:** If you are viewing a related service request, then that service request opens in a new window on top of the existing service request.

11.24 Viewing a List of Service Requests by Customer or by Item

You can view the service request history for a product or item instance to help you diagnose the problem. The Service History tab displays service requests for the specified customer. You can filter by a specific instance, instance component, instance sub-component, item and customer, item component, and item sub-component.

If the item instance was transferred from one customer to another, this tab will not display service requests for the item instance when it was owned by another customer.

Use this procedure to view a list of service requests for a customer filtered by different criteria such as an inventory item or an installed base item.

To view a list of service requests by customer or by item:

1. Navigate to the Service Request window.

2. Create a service request or display an existing one.

3. Select the Service History tab.

4. Select one of the following filters in the View Details For drop down list:

   - Instance

     Displays all service requests logged against the Oracle Install Base or Oracle Enterprise Install Base instance displayed in the service request header. This includes all service requests logged by any previous product owners.

   - Instance Component

Displays all service requests logged against the instance component displayed in the header. This includes all service requests logged by any previous product owners.

- Instance Sub-Component

    Displays all service requests logged against the instance sub-component displayed in the header. This includes all service requests logged by any previous product owners.

- Item & Customer

    Displays a list of service requests for the item and customer specified in the header region.

- Item Component

    Displays a list of service requests for the item component and customer specified in the header region.

- Item Sub-Component

    Displays a list of service requests for the item sub-component and customer specified in the header region.

5. Click Refresh to display the list.

11.25 Printing a Service Request

You can display a service request with all notes and complete audit trail in a browser window so it is ready to print by clicking the Print Friendly Format button

You can also display a summary of the service request, without notes or audit trail, by selecting Print Request from the Tools menu regardless which tab of the Service Request window you are working on.

To print a service request:

1. Display a service request you wish to print in the Service Request window.

2. Click the Log and Notes button.

    The Log Notes window appears.

3. Click Print Friendly Format.

    The service request displays in a browser window formatted for printing.

11.26 Closing a Service Request

This topic explains how you can close a service request. All actions are optional and depend on your organization's business practices.

To close a service request:

1. Display the service request in the Service Request window.

2. Select the Workbench tab.

3. If your organization uses resolution codes, then select one using the Resolution Code list of values.

> **Note:**   Resolution codes can be based on one or more of the following criteria: service request type, item category, item and problem code.

The system determines a list of valid resolution codes based on the values entered on the service request. The following are some of the rules and validations:

- Unmapped resolution codes always appear in the Resolution Code list of values. Unmapped resolution codes are generic and apply to all request types, products, product categories and problem codes.

- If an item, but no item category has been selected for the service request, the application will look for all resolution codes that are valid either for the item, or for any of the item categories, of which the item is part.

- If no resolution codes have been identified after evaluating all resolution code mapping criteria, the list of values shows all unmapped resolution codes defined in the system.

- If the resolution code becomes invalid after updating some of service request's attributes, the resolution code will be cleared, and you must select a new, valid, resolution code.

4. If you wish to describe the resolution, enter a Resolution Summary.

5. If you wish to document how the issue was resolved, then enter a note. See Creating a Note for a Service Request on page 11-39.

6. If you wish to bill the customer, then complete the charges for the service request on the Charge tab. See Creating a Charge Line on page 20-9.

7. Use the Status field LOV to select a status indicating that the service request is closed.

8. Click Save on the toolbar.

11.26.1 Closing Tasks and Service Requests Automatically

Your administrator can set up the application to:

- Automatically cancel open tasks that are not being worked on, upon closing the service request

  When a service request is closed, the application performs defined validations and cancels any open tasks that are scheduled for a future date.

- Automatically close service requests

  When all work on service request tasks is done and all charge lines have been submitted to order management for billing, the application closes the service request unless a define exception condition exists.

For information on setting up the automatic closure of tasks and service requests, refer to the *Oracle TeleService Implementation Guide*.

11.27 Indicating You are Not Available to Receive Work

Use this procedure to indicate you are not available to receive new service request or task assignments. You must do so whenever you take a long break or go on vacation otherwise work may continue to be assigned to you through the automatic service request assignment process or by other agents using Oracle Assignment Manager.

Indicating you are not available using this procedure does not affect incoming calls when you are working with Oracle Inbound. For incoming calls, you are available to take a call whenever you log into a specific work queue and you are not on the phone with a customer. See the *Universal Work Queue User Guide* for more details on how you indicate you are not available to take calls.

To indicate you are not available to receive work:

1. Navigate to any Oracle TeleService window such as the Service Request, Contact Center.

2. Select Web Availability from the Tools1 menu.

   The Resource Availability window appears.

3. Deselect the Available check box.

> **Note:** You must remember to make yourself available again or you will not receive any new task or service request assignments.

4. Click **Save** on the toolbar.

11.28 Setting Default Values to Speed Up Service Request Creation

Use this procedure to set up system profiles that automatically fill in information for you and speed up the process of creating a service request. You can always change the default values at the time you create the service request.

To set up service request defaults:

1. Navigate to Others > Profile System Values

   The Find System Profiles window appears.

2. Select the User and "Profiles with No Values" check boxes.

3. Use the User list of values to enter your user name.

4. To view a subset of the user-definable system profile options, enter a partial name in the Profile field. You can use the percent sign (%) to indicate partial names. For example, Service% displays all the profile options starting with the word Service. For a list of profiles you can set, refer to Profile Options You Can Set to Default Information in Service Requests on page 11-64.

5. Click Find.

   The System Profile Value window appears listing the results of your search. The profiles you can modify are the ones with enabled fields in the User column. Profiles that cannot be set at the user level appear gray.

   > **Note:** The profile options are not necessarily listed in alphabetical order because of varying punctuation.

6. If you wish to select a default value for a profile, then select a value from the list of values in the User field.

7. Click Save.

11.28.1 Profile Options You Can Set to Default Information in Service Requests

The table below lists some of the profile options you can use to automatically fill in information into new service requests. The Service Request Field column gives you the field you can default and its location. The Profile Option column lists the profile option name. The Description column includes information on valid values.

Service Request Field	Profile Option	Description
Assignee (Tasks tab)	Service: Default Task Assignee on the Service Request Tasks Tab	Default for the Assignee, the person assigned to complete the task.
Assignee Type (Tasks tab)	Service: Default Assignee Type on the Service Request Tasks Tab	Default for the Assignee type. Valid Values: Employee Resource, Group Resource, Team Resource, Supplier Contact
From To (Workbench tab)	Service: Time Span for Notes	Defaults the number of days for displaying service request notes.
Group (Service request group owner)	Service: Default Group Owner for Service Requests	Default for the group owner of a service request. This is the group responsible for ensuring the service request is resolved.
Item (List of values in the Item field of the Service Request window header)	Service: Service Request Creation Product List Filter	Determines whether the list of items in the Item list of values includes both items in inventory and installed base. Valid Values: Inventory, Instance, All
Make Public (Service Request window header check box)	Service: Default Make Public Flag	Defaults the check box on the service request header and determines whether a service request is visible to customers on their Oracle iSupport Web portal. Valid Values: Yes, No

Service Request Field	Profile Option	Description
Owner Type (Tasks tab)	Service: Default Owner Type on the Service Request Tasks Tab	Default for the Owner Type field. Valid values: Employee Resource, Group Resource, Team Resource, Supplier Contact
Owner (Service request owner)	Service: Default Service Request Owner	Default value for the service request owner.
Owner (Tasks tab)	Task Manager: Default Task Owner	Default task owner. Valid values: Any valid resource from the selected Owner Type.
Priority (Tasks tab)	Task Manager: Default Task Priority	Default for task priority.
Respond By (Workbench tab)	Service: Default Coverage for SLA	Default response and resolution times for service requests that do not have an applicable contract.
Resolve By (Workbench tab)	Service: Default Coverage for SLA	Default response and resolution times for service requests that do not have an applicable contract.
Severity (Service Request window header)	Service: Default Service Request Severity	Default for the service request Severity field.
Status (Service request status)	Service: Default Service Request Status	Default value for the service request Status field.
Status (Tasks tab)	Task Manager: Default Task Status	Default task status.

Service Request Field	Profile Option	Description
Status (Workbench tab)	Notes: Default Note Status	Sets the default status of new notes. Public makes it possible for Oracle iSupport users to view the note. Valid values: Private, Public, Publish Default value: None
Type (Service request type)	Service: Default Service Request Type	This profile option provides a default value for the Service Request Type field.
Type (Tasks tab)	Task Manager: Default Task Type	Default task type.
Type (Workbench tab)	Service: Default New Note Type in Workbench Tab	Default value for note type.
Urgency (Workbench tab)	Service: Default Service Request Urgency	Default for the service request Urgency field.

11.29 Explaining Service Request Security

Service products can optionally have data security enabled, which restricts the data that users can access. With security enabled, users can create, view, or update only those service requests with types to which that they have access. Enabling security impacts all service product flows at the site level. Service data security is turned off by default.

Your administrator can restrict by Responsibility, which users can create and access what types of service requests and related information. In order to set up security, your administrator will need to map responsibilities to Service Request Types and then enable security. For information on setting up service request security, refer to the *Oracle TeleService Implementation Guide*.

If the standard service security is enabled and your responsibility is not mapped to a particular Service Request Type:

- You cannot create, view, or modify any service request associated with that Service Request Type. This includes service request related data such as tasks, notes, or interaction history.

> **Note:** It is possible to no longer have access to a service request or service request task, to which you previously had access.
>
> For example:
>
> - Your administrator could change the setup so that you no longer have access to the Service Request Type for a given service request.
>
> - Another agent could change the Service Request Type for a given service request to a Service Request Type, to which you do not have access.
>
> If this happens and you need access, you should contact your administrator.

- You cannot view the relationships of a service request to other service requests, of that type.

- You are also excluded from the lists of resources that other agents use to assign service request ownership and tasks for that Service Request Type.

When service security is enabled, it secures service request data not just in Oracle TeleService, but in all applications that use service requests. Following are examples of how some of the flows are affected when service security is enabled and your responsibility is not mapped to a particular Service Request Type:

- You cannot view other service requests that are related to a service request if these other service requests are of that type.

- When searching for related service requests in Oracle Knowledge Management, the search will not bring up service requests that are of that type.

- If you have Oracle Telephony installed you will not be able to transfer a service request of a particular type to an agent who does not have access to that type of service request.

- When viewing service request history for a customer's product in Oracle Install Base, you will not be able to see service requests of that type.

The following modules are impacted when service security is enabled. For information on how each uses security, refer to How Turning on Standard Service Security Affects Other Applications, in the *Oracle TeleService Implementation Guide*.

- Tasks

- Assignment Manager
- Oracle Inbound
- Universal Work Queue
- Oracle Enterprise Asset Management
- Oracle Install Base
- Oracle Daily Business Intelligence
- Oracle Knowledge Management

12

Creating Asset Maintenance Service Requests for Internal Assets

This chapter explains how to manage asset maintenance service requests for internal assets tracked in Oracle Enterprise Asset Management (eAM), from the Service Request module. It covers:

- About Asset Maintenance Service Requests

- Creating an Asset Maintenance Service Request

- Tracking Work Orders for an Internal Asset

Refer to the *Oracle Enterprise Asset Management User's Guide*, for detailed procedures on managing internal assets.

12.1 About Asset Maintenance Service Requests

This group of topics explains how you can manage asset maintenance service requests and work orders for internal assets tracked in eAM. Oracle eAM specializes in maintaining internal assets using a preventive maintenance schedule. Work that is created based on a preventive maintenance schedule is considered planned work. However, an employee can log a service request for a broken printer, even if a technician is scheduled to check the printer at regular intervals each month. This allows eAM to track unplanned work.

From the Service Request form, you can:

- Log an asset maintenance service request for an internal asset.

  See Creating an Asset Maintenance Service Request on page 12-2

- View work orders associated with an asset maintenance service request in order to help you monitor work progress.

12.2 Creating an Asset Maintenance Service Request

Use this procedure to create an asset maintenance service request.

To create an asset maintenance service request:

1. Navigate to Service Requests > Create Service Requests.

2. From the Service Request header, select an asset maintenance service request type from the Type list of values.

   An asset maintenance service request is a request for maintenance on an asset maintained by eAM. Selecting an asset maintenance service request type, will:

   - Enable the Work Orders tab.

   - Disable the Subject tab.

   - Disable Install Base and Service Contracts fields in the header.

   - Disable Item Category and Revision fields in the header.

   Note :   The Service Request Type list of values contains a column called Asset Maintenance. You can look at this column to see which types are used for asset maintenance service requests.

   ---

3. Select an Inventory Org from the list of values.

   The field defaults from the Service: Inventory Validation Organization profile option. The inventory org can only be changed for asset maintenance service requests. It cannot be changed for other service requests.

Note 1: You must enter an Inventory Org for an asset maintenance service request. A customer and problem summary are the only other two pieces of information you must enter. However, your administrator can also require that you enter a contact by setting up a profile option.

The other mandatory fields, Type, Status, and Severity can be automatically defaulted from preferences stored in system profile options. You can set up your own default preferences by following the procedure outlined in Setting Default Values to Speed Up Service Request Creation on page 11-63.

Note 2: The Inventory Org field is hidden out of the box. You or your administrator can also use folder functionality to display the field.

4. Select a customer. You can select a customer by name or by entering a single piece of identifying information such as the phone number. For details on the different service request entry points, see Selecting a Customer for a Service Request on page 11-27.

Note: Installed base and contracts fields are not valid entry points for asset maintenance service requests.

5. Select the Workbench tab and enter a summary of the customer problem in the Problem Summary field.

6. Optionally, select an eAM asset group from the Item list of values; or an asset number from the Serial list of values within the Service Request header.

7. Optionally, select the Owning Department.

This value is defaults based on the asset number.

Note: The Owning Department field is hidden out of the box. You or your administrator can also use folder functionality to display the field.

8. Click the Save icon in the toolbar.

12.3 Tracking Work Orders for an Internal Asset

Oracle eAM uses work orders to complete maintenance work, rather than tasks. If you create a task in Oracle TeleService it will not be passed to users in Oracle eAM. For asset maintenance service requests, companies should use work orders rather than tasks.

Use this procedure to view work orders associated with maintenance asset service requests.

To track work orders for an internal asset:

1. Navigate to Service Requests > Find Service Requests

   The Search Service Request window appears.

   Search for the service request as described in Searching for a Service Request on page 11-18.

   Although you do not have to enter a service request type in the Search Service Request window, you will only find asset maintenance service requests if the service request that you are looking for has an asset maintenance service request type.

   > **Note:**   Your administrator must set the Service: Serial List of Values in Find Service Request profile option to make the application look for eAM assets in the Serial list of values within the Search Service Request window.

2. After the service request opens in the Service Request form, select the Work Orders tab.

3. If there are work orders associated with the service request, they appear in the summary region of this tab:

   a. Work Order: identifies the work order number.

   b. Status: identifies the current status of the work order.

   c. Department: indicates the maintenance department responsible for maintaining the asset.

    d. Maintained Asset Number: identifies an asset number or a rebuildable item serial number.

    e. Asset Group: classifies assets, which have a common attributes. An asset group is similar to a Product in Oracle Inventory.

    f. Asset Type: classifies the asset type, such as asset or rebuildable inventory item.

    g. Asset Activity: describes the maintenance activity, including BOM and routing to be performed. For example, a truck oil change.

    h. Priority: identifies the priority for the work order.

    i. Firm check box: if checked, indicates that planning and scheduling does not adjust the schedule, regardless of material or resource availability.

4. Select a work order line.

5. Confirm the detail for the selected work order:

    a. Description: describes the work order.

    b. Request Dates region: lists a requested start date and end date for the selected work order.

    c. Scheduled Dates region: lists a scheduled start date, completion date and the estimate duration (in hours) for the selected work order.

    d. Actual Dates region: lists the released date, completed date, and closed date for the selected work order.

For more information, refer to the *Oracle Enterprise Asset Management User's Guide.*

13

Managing Customer Tasks

This chapter explains how to manage customer tasks from the Contact Center. It covers:

- About Managing Customer-Related Tasks
- Viewing a Customer Task
- Creating a Task Manually
- Assigning Customer-Related Tasks
- Updating Tasks
- Reassigning Tasks

13.1 About Managing Customer-Related Tasks

This group of topics describes how to create and assign simple customer-related tasks such call-backs, customer meetings, and visits using the Tasks tab of the Contact Center.

The task functionality in Oracle TeleService is provided by the Tasks module which is a part of the Oracle E-Business Suite foundation. The Tasks tab is designed to provide you with an easy way to create and view tasks related to customer activities. You can also choose to display the closed tasks in the task summary list.

You can find more information about using tasks in the *Oracle Common Application Components User's Guide.*

The task-related topics covered here include:

- Viewing a Customer Task
- Creating a Task Manually

- Assigning Customer-Related Tasks

- Updating Tasks

- Reassigning Tasks

Contrasting Customer Related-Tasks and Service-Related Tasks

There are situations when you will create a task that is specifically related to managing a customer account. For example, if you would like to set up a meeting with a customer to review account contact information. The tasks you create in the Contact Center from the Tasks tab are tied to the customer and not to any service request you create.

There are also times when you will create tasks that are related to a specific service request. For example, if you would like to dispatch a technician to repair a copier at a customer site. The tasks you create in the Contact Center from the Service Request tab or the tasks you create in the Service Request window are tied to a particular service request.

13.2 Viewing a Customer Task

Use this procedure to view customer tasks in the Contact Center:

To update a customer task:

1. Display the customer in the Contact Center.

2. Select the Tasks tab.

   A list of existing tasks appears in the summary table. Choose the task you wish to update.

3. To show closed tasks, select the Include Closed check box.

   The summary table is refreshed and displays active and expired tasks associated with the customer in the Contact Center header.

4. Review the summary table.

   You can sort the summary information by ascending or descending order by selecting one of the following column headings.

   - Creation Date

   - Number

   - Type

- Status

- Subject

- Priority

- Owner

- Publish

13.3 Creating a Task Manually

Use the following procedure to create a task manually.

To create a task manually:

1. Display the customer in the Contact Center.

2. Select the Tasks tab.

   A list of existing tasks appears in the summary table. You can choose to include closed tasks in this view by selecting the Include Closed check box.

3. Click the New icon in the toolbar.

4. Use the Type list of values to select a task type.

5. Select a task status using the Status LOV.

6. Enter a name for the task in the Subject field.

7. In the Desc. field, enter a brief description of the task.

8. If needed, in the Parent field, select a task to which this task is to be linked. Normally, you would select a parent task if the task you are creating is a follow up on another task.

9. Assign task ownership to a group or person who will be responsible for the completion of the task (Owner Type and Owner fields) and to the individuals or teams who will complete the tasks (Assignee Type and Assignee).

10. Select the Planned Start and End Dates.

11. If you wish to display the task for the customer to see on their Oracle iSupport Web portal, then select the Publish check box.

12. Click Save on the toolbar. A system generated task number is displayed in the Num field.

13. If you wish to create a note related to the task, then click Add Notes to open the Notes window where you can create it.

14. If an Oracle Workflow process is available with this task type, then you can launch it by clicking Launch Workflow. The application displays a confirmation message.

15. If you wish to enter additional assignees and other details such as dependencies, references, and contacts, click More.

13.4 Assigning Customer-Related Tasks

This topic explains how to assign customer-related tasks such as customer call-backs or customer visits, to an owner, the individual or group responsible for its completion, and one or more assignees, the individuals or teams that carry out the work. It covers:

- Task Assignment Concepts on page 13-4
- Selecting Task Owners and Assignees on page 13-5

13.4.1 Task Assignment Concepts

You can assign a task to an owner, an assignee, or both. An owner can be an individual employee, such as a dispatcher, or a group that is responsible for ensuring the task is completed. An assignee can be either an individual employee or a team of employees who complete the task. In many cases the owner and assignee will be the same person.

You can either use the lists of values to select the owner and assignee or have the Assignment Manager suggest one based on service territories, availability, and other factors.

Selecting an assignee or owner puts that task into that individual's and group's work queue in the Oracle Universal Work Queue under the Tasks heading.

For task ownership:

- All members of a group see a task assigned to that group under the Group Owned heading regardless whether that task has also been assigned to an individual in that group or not.
- An individual who has been assigned the ownership of the task, sees task both under My Owner and Group Owned headings.

For task assignees:

- All members of a team that has been assigned the task see the task in the Group Assigned heading regardless whether that task has also been assigned to an individual in that group or not.

- An individual who has been assigned the task, sees task both under My Assigned and Group Assigned headings.

13.4.2 Selecting Task Owners and Assignees

Use this procedure to assign a task to owners and assignees.

To select owners and assignees for a task:

1. Display the task you wish to assign in the Tasks tab.

2. If you wish to assign ownership to a group then select Group Resource from the Owner Type list of values (LOV).

3. If you wish to assign ownership to an individual employee, then instead select Employee Resource from the Owner Type LOV.

4. Use the Owner LOV to select the group or individual or click Assignment Manager to assist you. This is the icon to the right of the field.

   The Assignment Manger window appears.

5. Choose a Selection Mode, either Assisted or Unassisted.

   The mode you select impacts the fields that display in the Selection Criterion region.

   a. For Assisted mode, use the Selection Criterion region to choose the search criteria that the Oracle Assignment Manager uses to suggest possible owners. You can select the following check boxes:

      – Preferred Resources (Contracts or Install Base)

      – Territories

      – Resource Availability

      – Filter Excluded Resource

> **Note:** If you use the Assisted Mode and decide to use service territories as a search criteria, you will also need to select additional attributes related to territories such as, area code, state, postal code, country, city, or customer name.

   b. For Unassisted mode, use the Selection Criterion region to enter the resource criteria that the Oracle Assignment Manager uses to suggest possible owners:

   – Enter a Resource Name. Enter at least three characters to make a selection or %%% if you want to search all.

   – Select a Resource Type from the list of values.

   c. Click Search.

   The application returns the list of qualified owners in the grid on the right side of the window. If no resources are suggested, then repeat the search with different search criteria.

   d. Select a resource from the list.

   e. Click OK.

6. If you wish to assign the task to a team for execution, then select Team Resource from the Assignee Type LOV. For individuals, select Employee Resource.

7. Use the Assignee LOV to select the team or employee assignee or click Assignment Manager to get assistance from the Assignment Manager as described above.

13.5 Updating Tasks

Use this procedure to update tasks:

To update a task:

1. Display the customer in the Contact Center.

2. Select the Tasks tab.

   A list of existing tasks appears in the summary table. Choose the task you wish to update.

3. Update the following information, as desired:

- Type
- Status
- Description
- Subject
- Parent
- Priority
- Owner Type
- Owner
- Assignee Type
- Assignee
- Private or Publish flag
- Dates
- Effort

4. Click the Save icon.

13.6 Reassigning Tasks

Use this procedure to reassign tasks.

To reassign tasks:

1. Display the task you wish to assign in the Tasks tab.

2. If you wish to reassign a task to a group then select a new Group Resource from the Assignee Type list of values (LOV).

3. If you wish to reassign ownership to an individual employee, then instead select a new Employee Resource from the Assignee Type LOV.

4. Use the Assignee LOV to select the group, team, or individual or click Assignment Manager to assist you. This is the icon to the right of the field.

   The Assignment Manger window appears.

5. Choose a Selection Mode, either Assisted or Unassisted.

   The mode you select impacts the fields that display in the Selection Criterion region.

a. For Assisted mode, use the Selection Criterion region to choose the search criteria that the Oracle Assignment Manager uses to suggest possible owners. You can select the following check boxes:

– Preferred Resources (Contracts or Install Base)

– Territories

– Resource Availability

– Filter Excluded Resource

Note: If you use the Assisted Mode and decide to use service territories as a search criteria, you will also need to select additional attributes related to territories such as, area code, state, postal code, country, city, or customer name.

b. For Unassisted mode, use the Selection Criterion region to enter the resource criteria that the Oracle Assignment Manager uses to suggest possible owners:

– Enter a Resource Name. Enter at least three characters to make a selection or %%% if you want to search all.

– Select a Resource Type from the list of values.

c. Click Search.

The application returns the list of qualified owners in the grid on the right side of the window. If no resources are suggested, then repeat the search with different search criteria.

d. Select a resource from the list.

e. Click OK.

6. Click the Save icon from the toolbar.

14

Managing Service Request Tasks

This chapter explains how to manage service request tasks. It covers:

- About Managing Service Request Tasks
- Creating a Task for a Service Request Manually
- Assigning Tasks
- Creating Tasks Using a Template
- Using Auto Task Generation
- Entering Task Details

14.1 About Managing Service Request Tasks

This group of topics describes how to create and manage service request tasks, which are the units of work required to fulfill the service request. For example, you can create a task to call back a customer about the service request or a task for a service technician to make a repair at a customer site.

> **Note:** If you wish to create tasks for a service request, you must first create a service request.

The task functionality in Oracle TeleService is provided by the Tasks module, which is a part of the Oracle E-Business Suite foundation. The Tasks tab is designed to simplify the process of creating a task for service requests.

You can find more detailed information about managing tasks in the *Oracle Common Application Components User's Guide.*

The task-related topics include:

- Creating a Task for a Service Request Manually
- Assigning Tasks
- Creating Tasks Using a Template
- Using Auto Task Generation

14.2 Creating a Task for a Service Request Manually

Use this procedure to create a task manually.

Prerequisites

You can only launch Oracle Workflow processes for task types that have the processes set up.

To create a task manually:

1. Display the service request.

2. Select the Tasks tab.

3. Use the Type list of values, to select a task type.

Note: If you are creating a field service task, a task that will require the dispatch of an agent to the customer site, then make sure you:

- Select a dispatch task type. Task types are set up by your application's administrator.

- Verify an incident address for the customer or related customers on the service request. An incident address is required for Oracle Field Service to dispatch technicians. If a valid incident address is not selected, you will receive an error message and will be prompted to select an incident address from the list of values which, is tied to the customer or related customers.

The task type determines how the task is assigned and can be set up to launch an Oracle workflow process.

4. Select a task status using the Status LOV. If you are planning to assign a field service task, then select a status that indicates the task is in progress.

5. Enter a name for the task in the Subject field.

6. In the Desc. field, enter a brief description of the task.

7. If you wish to display the task for the customer to see on their Oracle iSupport Web portal, then select the Publish check box.

8. If needed, in the Parent field, select a task to which this task is to be linked. Normally, you would select a parent task if the task you are creating is a follow up on another task.

9. If you wish to prevent the service request from being closed until this task is closed, then select the Restrict Closure flag.

10. Assign task ownership to a group or an individual who will be responsible for the completion of the task, such as a dispatcher, (Owner Type and Owner fields) and to the individuals or teams who will complete the tasks (Assignee Type and Assignee). See Assigning Tasks on page 14-3 for details.

11. Select the Planned Start and End Dates.

12. Click Save on the toolbar. A system generated task number is displayed in the Num field.

13. If an Oracle Workflow process is available with this task type, then you can launch it by clicking Launch Workflow. The application displays a confirmation message.

14. Click More to open the Task Details window to enter additional assignees and other details such as dependencies, references, and contacts. See Entering Task Details on page 14-9 and the Tasks section of the *Oracle Common Application Components User's Guide* for more information.

14.3 Assigning Tasks

This group of topics explains how to assign tasks to an owner, the individual or group responsible for its completion, and one or more assignees, the individuals or teams that carry out the work. It covers:

- Task Assignment Concepts on page 14-4

- Selecting Task Owners and Assignees on page 14-5

- Assigning Task Ownership Automatically on page 14-7

14.3.1 Task Assignment Concepts

You can assign a task to an owner and one or more assignees. An owner can be an individual employee, such as a dispatcher, or a group that is responsible for ensuring the task is completed. An assignee can be either an individual employee or a team of employees who complete the task. In many cases the owner and assignee will be the same person.

You can either use the lists of values to select the owner and assignee or have the software assist you.

> **Note:** you cannot manually select any resource as the task owner or task assignee. The LOV limits resources to those who have access to the service request associated with the service request task.

To assign group or individual owners, the Assignment Manager can suggest owners based on service territories, availability, and other factors.

For individual assignees, you can get the assistance of either the Assignment Manager or, for field service tasks, the Oracle Advanced Scheduler.

The Oracle Advanced Scheduler is an Oracle Field Service module that permits you to optimize schedules based on such factors as travel time, work load, and cost.

The application automatically determines when to display the Assignment Manager or the Advanced Scheduler based on the task type you select.

Selecting an assignee or owner puts that task into that individual's and group's work queue in the Oracle Universal Work Queue under the Tasks heading.

For task ownership:

- All members of a group see a task assigned to that group under the Group Owned heading regardless whether that task has also been assigned to an individual in that group or not.

- An individual who has been assigned the ownership of the task, sees task both under My Owner and Group Owned headings.

For task assignees:

- All members of a team that has been assigned the task see the task in the Group Assigned heading regardless whether that task has also been assigned to an individual in that group or not.

- An individual who has been assigned the task, sees task both under My Assigned and Group Assigned headings.

14.3.2 Selecting Task Owners and Assignees

Use this procedure to assign a task to owners and assignees.

To select owners and assignees for a task:

1. Display the task you wish to assign in the Tasks tab of the service request.

2. If you wish to assign ownership to a group then select Group Resource from the Owner Type list of values (LOV).

3. If you wish to assign ownership to an individual employee, then instead select Employee Resource from the Owner Type LOV.

4. Use the Owner LOV to select the group or individual or click Assignment Manager to assist you. This is the icon to the right of the field.

   The Assignment Manger window appears.

5. Choose a Selection Mode, either Assisted or Unassisted.

   The mode you select impacts the fields that display in the Selection Criterion region.

   a. For Assisted mode, use the Selection Criterion region to choose the search criteria that the Oracle Assignment Manager uses to suggest possible owners. You can select the following check boxes:

      – Preferred Resources (Contracts or Install Base)

      – Territories

      – Resource Availability

      – Filter Excluded Resource

   Note: If you use the Assisted Mode and decide to use service territories as a search criteria, you will also need to select additional attributes related to territories such as, area code, state, postal code, country, city, or customer name.

   ---

     b. For Unassisted mode, use the Selection Criterion region to enter the resource criteria that the Oracle Assignment Manager uses to suggest possible owners:

          – Enter a Resource Name. Enter at least three characters to make a selection or %%% if you want to search all.

          – Select a Resource Type from the list of values.

     c. Click Search.

        The application returns the list of qualified owners in the grid on the right side of the window. If no resources are suggested, then repeat the search with different search criteria.

     d. Select a resource from the list.

     e. Click OK.

> **Note:** See the Assignment Manager chapter of the *Oracle Common Application Components User's Guide* for more information.

6. If you wish to assign the task to a team for execution, then select Team Resource from the Assignee Type LOV.

7. If you wish to assign the task to an individual employee for execution, then select Employee Resource.

8. Use the Assignee LOV to select the team or employee assignee or click Assignment Manager to get assistance either from Assignment Manager or Oracle Advanced Scheduler modules. Which module appears depends on the task type you selected:

9. If the task you are assigning is of a field service Type (for example, Dispatch) and of a schedulable status (for example, In Process) then the Oracle Advanced Scheduler window appears. See the *Oracle Advanced Scheduler User Guide* for information on scheduling resources.

> **Note:** A field service task must have the Dispatch rule associated to it, and the Schedulable flag set to Yes. You should verify with your administrator which task types have been set up as field service tasks.

10. If the task is not of a field service Type, then you can use the Assignment Manager to assign a resource in the same manner as the owner.

11. If you wish to assign the task to multiple individuals, then you can add additional assignees by clicking More and following the procedure outlined in Defining Resource Requirements on page 14-10.

14.3.3 Assigning Task Ownership Automatically

Your administrator can set up Oracle TeleService to assign tasks automatically. For more information, refer to the *Oracle TeleService Implementation Guide*.

14.4 Creating Tasks Using a Template

Use this procedure to automatically create the set of tasks required to take care of the customer problem.

The application creates the tasks by using a set of task templates, called a Template Group, which are set up by the administrator.

Prerequisites

Template groups must be set up first according to instructions found in the *Oracle Common Application Components Implementation Guide*.

To create tasks using a task template:

1. Open the Task tab in the Service Request window.

2. Click Use Template in the Task tab.

3. The Create Tasks from Template Group window opens.

4. In the Template Group field, select the template group based for the tasks you want created.

   The Source Document field displays `Service Request` as the tasks are being created for a service request.

   Source Value populates with the service request number. You can select a different service request number if you wish to create the tasks for a different service request.

5. Owner Type and Owner fields are defaulted from profile options Task Manager: Owner Type for Task and Task Manager: Default Task Owner. You may change

these values, if needed. Owners are responsible for ensuring the tasks are completed.

6. Click Create Tasks.

   The Tasks tab displays the different tasks that have been created. You can assign them to the assignees that will carry them out.

14.5 Using Auto Task Generation

When you create a service request, the application can automatically generate tasks to help resolve customer problems. This makes it possible for you to schedule a repair on the first call rather than having the dispatcher call the customer back, for instance.

Automatic task generation is most useful for known problems that have standard resolutions. If you need to research the problem, by using the knowledge base and other methods, then the tasks required to resolve the problem will vary.

The generated tasks appear in the Tasks tab of the service request and must be assigned and scheduled by the agent handling the service request or through automatic assignment.

Using the procedures described in this topic group, you can automatically generate tasks based on one of the following two types of criteria.

■ A combination of the Service Request Type, the item or item category, and problem code

   For example, a manufacturer of laboratory equipment can automatically set up tasks to send different diagnostic equipment to a customer's site depending on what equipment type and model the customer owns.

■ Service Request Type and information entered in additional service request attributes you have set up

   For example, a city's solid waste department can automatically create tasks to send a different truck depending on the size of the item to be picked up.

> **Note:** Your administrator must choose between the two methods, which are mutually exclusive.

Prerequisite:

Automatic task generation must be setup by your administrator. For information on setting up automatic task generation refer to the *Oracle TeleService Implementation Guide.*

To review automatically generated tasks:

1. Create a service request using a service request type that has been set up for automatic task generation.

2. Enter the following data, as required by the setup.

   - Item

   - Item Category

   - Problem Code

   - Attributes

3. Click the Save icon in the toolbar.

   If tasks are created automatically, the Tasks tab appears, showing the newly created tasks for your review.

   > **Note:**   your administrator can also set up the application to automatically assign a task owner using Assignment Manager.
   >
   > The system does not automatically assign the task assignee. This is part of the scheduling process.

14.6 Entering Task Details

This group of topics covers the entering of task details such as resource assignments, dependencies, references, and contacts.

- Defining Resource Requirements on page 14-10

- Setting Task Dependencies on page 14-10

- Linking Tasks to Source Documents on page 14-11

- Setting Recurrence Schedules on page 14-11

- Viewing Task Audit History on page 14-12

- Debriefing a Task on page 14-13

For information on the other tabs of the Task Detail window, please refer to the *Oracle Common Application Components User's Guide*.

14.6.1 Defining Resource Requirements

Use this procedure to assign a task to multiple assignees and to specify resources such as the tools needed to complete a task.

To define resource requirements:

1. Open the Task Detail window by clicking **More** in the Task tab.

2. Select the Resource tab.

3. In the Resource Type field, select the resource type needed to solve the customer issue.

4. In the Unit field, enter a unit of measure for the resource, for example, three hours.

5. Select the Enabled check box if it is not already checked by default.

6. In the Assignments region, select from the list of values in the Type and Name fields.

7. Select the status of the task in the Status field.

8. If you want to schedule a resource, select the Schedule check box. To complete scheduling:

    a. Enter scheduled distance and duration values, and select a unit of measure.

    b. If you want to update actual schedule information, enter the actual Start and End dates.

    c. You may use the Assignment Manager to select and schedule the resource. To open the Assignment Manager, click the Assignment Manager icon in the toolbar.

9. Click OK to save your work.

14.6.2 Setting Task Dependencies

Task dependencies store the desired order among tasks.

> **Note:** The task dependencies you enter here are not enforced by Oracle E-Business Suite applications. You must supply your own customization to use this feature.

Prerequisites

You must create a task before you can set dependencies for it.

To set task dependencies:

1. From the Task Detail window, select the Dependencies tab.

2. Select the dependent task number from the list of values in the Task Number field. The task name is automatically displayed.

3. Enter a numerical value in the Offset field. This value determines the time that separates the action of initial tasks from subsequent tasks. Use this feature to organize tasks with time sensitive restrictions.

4. Select a unit of measure in the UOM field.

5. Click OK.

14.6.3 Linking Tasks to Source Documentation

Creating references to a source document allows you to reference pertinent background information. Source documentation could be the original service request that resulted in the creation of a task.

To link a task to its reference document:

1. From the Task Detail window, open the References tab.

2. Select from the list of values in the Document Type field.

3. Enter the identification number of the source document in the Number field.

4. Optionally, enter a reference type in the Type field.

5. Click **OK**.

14.6.4 Setting Recurrence Schedules

If the task is to be performed on a regular basis, you may specify a daily, weekly, monthly, or yearly schedule.

To set a recurrence schedule for a task:

1. From the Task Detail window, select the Recurrences tab.

2. Select the frequency for the recurrence of the task by selecting the Daily, Weekly, Monthly, or Yearly button. Your selection determines the fields available in the Recurrences tab.

3. In the Start field, select the date after which the task is to be repeated.

4. Optionally, in the End field, select the date after which the task will not be performed.

5. Set the recurrence schedule.

6. Click **OK**.

14.6.5 Viewing Audit History for the Task

Select the Audit tab of the Task Detail window to view a log of changes that have been made to the task.

14.6.6 Copying Tasks

Use the following procedure to copy a task.

Prerequisites

You must create a task before you can copy it.

Copying a task:

1. Display the service request.

2. Select the Tasks tab.

3. Select a task to copy from the summary table.

4. Select Copy Task.

   With the exception of the task status, the task details are copied to the new task. The task status value will depend on setup. For example, if you copy a closed task, the new task's status will not be closed.

   After the new task is copied you can make modifications.

5. Click the Save icon in the toolbar.

14.6.7 Debriefing a Task

Use the following procedures to debrief a task.

Prerequisites

You must create a task before you can debrief it.

Debriefing a task:

1. Display the service request.

2. Select the Tasks tab.

3. Select a task to debrief from the summary table.

4. Select Debrief.

5. This launches the Debriefed window of Oracle Field Service.

    From this window you can enter labor, material, and expenses required to complete the task.

6. For information on creating a Debrief for a task, refer to the *Oracle Field Service User Guide*.

14.6.8 Creating a Task Note

Use the following procedures to create task notes in the tasks tab.

Prerequisites

You must create a task before you can create a note for it.

Creating a task note:

1. Display the service request.

2. Select the Tasks tab.

3. Select a task that you wish to add a note to from the summary table.

4. Select Task Notes.

    The Notes window appears.

5. Enter a note in the Notes field.

6. Select a Note Type from the list of values.

7. Select a Status from the drop-down.

8. Click the Save icon from the toolbar.

   The note appears in the Notes and Summary tabs.

15

Sending Collateral from the Contact Center

This chapter explains how to send collateral to a customer contact from the Contact Center. It covers:

- About Sending Collateral
- Sending Collateral
- Viewing Collateral the Customer Contact has Received

15.1 About Sending Collateral

This group of topics explains how you can send collateral to the customer contact that you select in the Contact Center header.

The Collateral tab enables you to send physical or electronic collateral to contacts from within the Contact Center:

- Electronic collateral consists of a cover letter and other electronic files. You can choose to send the cover letter, the file, or both through e-mail, fax, or to print. These files are created in Oracle Marketing and are sent through an e-mail server, a fax server, or a printer.
- Physical collateral is tracked in Oracle Inventory and shipped through Oracle Order Management.

> **Note:** This functionality is enabled through Oracle TeleSales. For additional information, refer to the *Oracle TeleSales User Guide*.

From the Collateral tab you can:

- Select collateral items and cover letters, as well as specify how these items should be sent.

  See Sending Collateral on page 15-2.

- View the contact's collateral history to determine if a particular collateral item has been sent to the contact previously.

  See Viewing Collateral the Customer Contact has Received on page 15-3

15.2 Sending Collateral

Use this procedure to send collateral from the Contact Center.

Prerequisite

You must first confirm that the contact has an address defined with the Collateral Mail To usage defined.

To send a customer contact collateral:

1. Display the customer and contact in the Contact Center.

2. Select the Collateral tab.

3. Select the collateral you wish to send from the Name list of values.

   A Cover letter will default into the Cover Letter field if there is one associated with the collateral. You can also choose a cover letter from the list of values.

   The quantity, contact, and shipping information will also default.

4. If the collateral you select can be sent electronically or physically, you will need to choose the method to send it, by selecting either the Physical and Electronic radio buttons.

   > **Note:** Electronic collateral can be grouped into kits within Oracle Marketing. When an order containing a kit is processed, all items are sent.
   >
   > You can review kit details by selecting the Review Kit button.

5. Optionally, select a Source Code from the list of values.

> **Note:** Source codes are not typically used in service organizations.

6. Update the following fields, if necessary:

   - Quantity

   - Recipient

   - Ship Method

   - Send To Address

7. Click Add to Order.

8. The quantity is updated in the Added to Order fields.

> **Note:** You can clear the collateral cart by clicking the Remove button.

9. Click Review Order.

   The Review Order window appears.

10. Click Submit Order.

    You should see the an update to the Status field.

11. Select Close.

15.3 Viewing Collateral the Customer Contact has Received

Use this procedure to review collateral the customer contact has received.

To review collateral that the customer contact has received:

1. Display the customer and contact in the Contact Center.

2. From the Tools menu, select Collateral History.

   The Collateral History window appears with a summary of the collateral orders sent.

3. You can change the view for the collateral history, by:

   a. Selecting a new date range from the view Last drop-down list.

   b.   Clicking Display

4.   Select an order to view request information.

5.   Click Ok to return to the Contact Center.

16

Managing Critical Customers

The application automatically flags a customer as critical whenever a customer meets conditions defined in a customer profile.

The predefined customer profile, called Critical Customer, flags a customer as critical if the customer has more than five open service requests.

Your administrator can change the criteria by modifying the profile or by creating a new one altogether as described in the Setting Up Customer Profiles section of the *Oracle TeleService Implementation Guide*. The administrator must select any new profile to be used for criticality checking in the system profile option Customer Care: Profile Check for Determining Customer Criticality.

Agents can manually reset the criticality of a customer making a non-critical customer critical or vice versa and they can view the audit history of such manual over-rides.

Topics discussed in this chapter are:

- Finding Critical Customers

- Overriding the Criticality of a Customer

- Viewing Customer Criticality History

16.1 Finding Critical Customers

Use this procedure to find a critical customer.

To find a critical customer:

1. From the Customer Support responsibility, open the Find Criticality Overridden Customers window using the following navigation path:

Customer Management > Critical Customer Management

2. Enter either the customer name or number.

3. Click Find.

   If the customer is already queried in this form and its criticality has been overridden at least one time, details are displayed in Customer Criticality window. If the customer has not been overridden, the query returns no rows.

16.2 Overriding the Criticality of a Customer

You may have situations when the profile engine does not determine a customer as being critical based on the rules setup, but the customer still needs to be flagged as critical. You can override the system-determined criticality in order to deal with temporary or exceptional situations.

To override the criticality of a customer:

1. From the Customer Support responsibility, open the Find Criticality Overridden Customers window using the following navigation path:

   Customer Management > Critical Customer Management

2. If a customer has not previously been considered to be critical, click **New** to open the Override Customer Criticality window. Otherwise, query the customer.

3. In the Override Criticality section, select Yes in the Override field to make the customer critical. Select No to remove the critical designation.

4. Select an appropriate reason from the list of values in the Reason field.

5. Enter additional notes about this override in the Notes window. To open the Notes window, click **Notes**.

6. Enter the text of the note to further describe the customer situation.

7. Optionally select a note type from the Type list of values.

8. Select a status of Internal, External or Private.

9. Close the Notes window.

10. Save the changes you made. The changes you have made are recorded in the History region of the window.

16.3 Viewing Customer Criticality History

Use the Override Customer Criticality window to view historical audit information about whether the system determined criticality was overridden. You can view the reason for the override, the user name of the person who changed the criticality, the date when it was changed and the original system determined criticality. The history region displays only manual overrides of criticality.

17

Using Relationship Plans

Relationship plans make it possible for your organization to deliver personalized and proactive customer service by alerting agents to customer needs. It covers:

- About Relationship Plans
- What You Can Modify
- Managing Relationship Plan Alerts
- Searching for Relationship Plans and Portfolios
- Adding or Removing Relationship Plans for a Customer
- Viewing an Audit of a Relationship Plan
- Modifying a Relationship Plan
- Finding All Customers Assigned to a Relationship Plan
- Disabling a Relationship Plan for One or More Customers
- Customizing a Relationship Plan for a Specific Customer

17.1 About Relationship Plans

A relationship plan is a process which runs in the background while you work, periodically checking which customers meet one or more conditions.

Whenever you are working on a customer record that meets these conditions, the relationship plan automatically displays an alert message or launches a script that guides you through the interaction with the customer.

A simple relationship plan, such as Plan A described below, checks customers against only one condition. More complex plans, such as Plan B, evaluate customer

records using multiple conditions. If customers satisfy the main condition of the plan they qualify for the plan and the plan is added to their portfolio:

- Plan A

  If a customer contract is to expire in five or more days, then alert the agent with a message.

  All customers that satisfy the main condition (have at least one contract that is to expire in five or more days) qualify for the plan.

  All agents working on the records of qualified customers automatically get the alert.

- Plan B

  If a customer has ten or more open high-priority service requests, then check if the customer has orders of $1 million or more.

  For customers with orders above $1 million, launch a script that guides the agent in handling the customer call.

  For customers below that threshold, alert the agent with a message that the customer is a high-priority customer.

  All customers with ten or more open high-priority service requests qualify for the plan. Of the qualified customers those that have orders of $1 million or more display a script. Those that have orders below that amount display a message.

The relationship plan determines what action to take in two steps:

1. It evaluates the main condition of the plan to see if a customer qualifies for the plan. If a customer qualifies, then the plan gets added to their plan portfolio.

2. The plan then evaluates the qualifying customers based on any additional conditions to determine what action to take. Plans with only the main condition take the same action for all qualifying customers.

As Plan A includes only one condition, it alerts agents whenever a customer has a contract that will expire in five days.

Plan B takes different actions for different subsets of the customers who qualify.

17.2 What You Can Modify

Creating and modifying relationship plans requires knowledge of programming, concurrent processes, as well as the internal structure of the Oracle E-Business Suite

applications and is described in the Setting Up Relationship Plans section of the *Oracle TeleService Implementation Guide*.

However, you can modify relationship plans without specialized knowledge as described in this section. You can:

■   Add a relationship plan to a customer's portfolio.

This qualifies the customer for the plan even if they do not meet the qualifying condition. For example, if you know a customer is critical, you may wish to alert other agents regardless of whether the customer has the five escalated service requests normally required to trigger the plan. The plan still evaluates any additional conditions to decide what action to take. For instructions, see Adding and Removing Relationship Plans for a Customer on page 17-6.

■   Remove a plan from a customer's portfolio.

Use this option if you wish to disable one or more plans for a specific customer.

The customer no longer qualifies for the plan even if they satisfy the qualifying condition. Agents in your organization no longer receive alerts or scripts from the plan for this customer. For instructions, see Adding and Removing Relationship Plans for a Customer on page 17-6.

■   Disable a plan for one or more customers.

Use this option if you wish to disable a plan for one or more customers. The effect is the same as removing a plan from a customer's portfolio. For instructions, see Disabling a Relationship Plan for One or More Customers on page 17-9.

■   Create a customized plan for a customer.

Agents can create a customized plan for the customer by modifying the value of the qualifying condition. Suppose, for example, that a plan specifies that customers must have five escalated service requests before they are considered critical, but you know that Business World is a sensitive customer that should be considered critical even with one escalated service request. You can create a customized plan for Business World and change the value for the qualifying condition from greater than four to greater than zero. See Customizing a Relationship Plan for a Specific Customer on page 17-10.

■   Modify the plan.

You can change the value of the qualifying condition for all customers. If you decide that all customers should be considered critical and agents warned when a customer has just one escalated service request instead of five, then you can

modify the qualifying condition for the plan. See Modifying a Relationship Plan on page 17-8.

17.3 Managing Relationship Plan Alerts

Relationship plans monitor customer statistics while you work, and alert you with a message whenever the customer you are working on meets the conditions specified in the plan. In some cases, there may be a script associated with the plan. For example, your administrator can define a relationship plan that alerts you when a customer has a contract that is scheduled to expire. It allows you to launch a script that details how to handle the contract renewal process with the customer.

Use this procedure if the Customer Relationship Actions window appears when you are identifying a customer.

To manage relationship plan alerts:

1. Review all messages in the Relationship Plans Actions window.

2. Select one of the following:

   a. Remind Later: minimizes the window and allows you to address the issue later.

      After you click this button, the label changes to Remind Now and the minimized window is positioned in the upper left corner of the Contact Center window. When you are ready to review the messages with the customer, you can select the Remind Now button at any time to resize the Customer Relationship Actions window to its original size,

   b. Execute: launches a script.

      This button is only available if there is a script associated to a relationship plan.

      If there are scripts associated they will appear in the lower region of the screen. If there is more than one script you will need to choose a script prior to selecting the Execute button.

   c. Ok: exits out of the Customer Relationship Action window.

17.4 Searching for Relationship Plans and Portfolios

Use this procedure to:

- Search for and display a list of the relationship plans assigned to a customer's portfolio.

- Search for a relationship plan you wish to modify or customize.

To search for relationship plans and portfolios:

1. Navigate to Customer Management > Relationship Plans Management.

   The Relationship Plans Search window appears.

2. Enter your search criteria:

   - If you wish to view the plan portfolio for a customer, then enter a customer name or other customer search criteria.

   - If you wish to search for a specific plan to modify, disable, or customize, then enter the plan name using the Plan Name list of values.

3. Relationship plans can be set up for parties or specific accounts. If you wish to restrict your search, then select the Party or Account radio buttons. Otherwise, select Both.

4. You have the option of restricting your search by selecting one of the radio buttons in the Plan Type region:

   - Template: Search all general plans.

   - Custom: Search for all customized plans.

   - Both: Search both.

5. Click Search.

   Search results are displayed at the bottom of the Relationship Plans Search window.

   If you are searching by customer name or other customer attributes only, the search returns the customer record even if the customer has no plans in the portfolio (the Plan field is blank).

   If you are searching for a relationship plan to modify it, the search results display all of the customers with that plan. You can select any of the customer records to display the plan. If you wish to customize the plan for a particular customer, then select that customer.

6. Select the customer and click OK.

   The Plans Summary window appears. The left part of the window displays the customer's portfolio of relationship plans.

You can:

- Expand the hierarchy to view a list of all the plans for the customer.

- Select a plan from the hierarchy to view its details in the right section of the window.

- View all the customers who have been assigned to a plan by selecting the plan in the hierarchy and selecting the Inquiry tab.

From the Plans Summary window, you can also:

- Remove or add plans for the customer by clicking Add/Remove and following the procedure described in Adding and Removing Relationship Plans for a Customer on page 17-6.

- If you are an administrator you can also create a relationship plan by clicking New and following the steps described in the Setting Up Relationship Plans section of the *Oracle TeleService Implementation Guide*.

- View an audit of the usage of the plan by clicking Audit.

- View and modify details of a plan by clicking Details/Modify. See Modifying a Relationship Plan on page 17-8.

From the Plans Inquiry tab, you can:

- Disable the relationship plan for a customer by selecting the customer and clicking Disable. See Disabling a Relationship Plan for One or More Customers on page 17-9.

- Customize a relationship plan by clicking Customize and following the procedure described in Customizing a Relationship Plan for a Specific Customer on page 17-10

17.5 Adding or Removing Relationship Plans for a Customer

Use this procedure to add or remove plans for a customer. Adding a plan to a customer's portfolio qualifies the customer for the plan whether or not they satisfy the plan's qualifying condition. Removing a plan from the portfolio for a customer disables the plan for this individual customer even if they satisfy the qualifying condition.

If you wish to remove the relationship plan from the portfolios of multiple customers, then instead follow the procedure for Disabling a Relationship Plan for One or More Customers on page 17-9.

To add or remove relationship plans for a customer:

1. View the relationship plans for a customer in the Plans Summary window. See Searching for Relationship Plans and Portfolios on page 17-4 for details.

2. Click Add/Remove.

   The Add/Remove Plans window opens.

3. Click on the appropriate node on the hierarchy tree to view a list of available plans. For example, to list all customer-level plans, select the Customer Level Plans node.

   Plans currently assigned to the customer are listed below the selected node. Plans available to be assigned to the customer are listed in the right side of the window.

4. To assign a plan to the customer:

   a. Select the plan you want to assign to the customer on the right side of the window.

   b. Click the Left Arrow button.

      The plan is listed under the current node.

5. To remove a plan currently assigned to the customer:

   a. In the hierarchy tree, select the plan you want to remove.

   b. Click the Right Arrow button.

      The plan is deleted from the node.

6. Click **OK** to save your work and return to the Plans Summary tab.

17.6 Viewing an Audit of a Relationship Plan

Use this procedure to view the history of a relationship plan in the Audit History window, including information on when a plan was added or removed for a customer.

To view an audit of a relationship plan:

1. Search for the relationship plan and display it in the Plans Summary window as describe in Searching for Relationship Plans and Portfolios on page 17-4.

2. Select the plan in the navigation tree in the left side of the window.

3. Click Audit.

The Audit History window appears.

4. Click OK when you are done reviewing the history.

17.7 Modifying a Relationship Plan

Use this procedure to modify the condition used by the relationship plan to qualify customers. Any changes you make affect all customers.

To view and modify a relationship plan:

1. View the relationship plans for a customer in the Plans Summary window. See Searching for Relationship Plans and Portfolios on page 17-4 for details.

2. Select the plan whose details you want to view or modify.

3. Click Details/Modify.

   The Modify Plan window appears displaying the details of the plan.

4. You can modify the Plan Criteria region which specifies the qualifying condition for the plan:

   a. The Profile Check field displays what name of the setup that collects data about your customer. Profile checks are set up by the administrator, so do not change the value here without an understanding of the profile checks set up for your organization.

   b. You can modify the operator by selecting a different one using the Operator drop-down list.

   c. Depending on the operator you chose, you can modify the Low value, the High value, or both.

   Note: You cannot modify plan criteria, if the plan is attached to a customer.

5. If you have the prerequisite programming and applications knowledge for creating relationship plans, then select the Plan Details tab and modify other plan conditions or actions according to the procedures described in the in the Setting Up Relationship Plans section of the *Oracle TeleService Implementation Guide*.

6. Save the changes you have made.

> **Note:** You can remove a relationship plan from use by entering a date in the End Date field. You cannot delete relationship plans.

17.8 Finding All Customers Assigned to a Relationship Plan

Use the Relationship Plans Inquiry tab to find all customers who are assigned to a relationship plan.

To find all customers assigned to a relationship plan:

1. View the relationship plans for a customer in the Plans Summary window. See Searching for Relationship Plans and Portfolios on page 17-4 for details.

2. Select a specific relationship plan.

3. Select the Inquiry tab. It displays all of the customers assigned to this relationship plan.

4. If you wish to disable this plan for one or more customers then select the customer and click Disable. See Disabling a Relationship Plan for One or More Customers on page 17-9 for more details.

5. To create a customized version of the plan for a customer, select the customer and click Customize. See Customizing a Relationship Plan for a Specific Customer on page 17-10.

17.9 Disabling a Relationship Plan for One or More Customers

You can disable the relationship plan for one or more customers in the Disabling a relationship plan from the Plan Inquiry tab has the same effect as removing a relationship plan from a customer's plan portfolio.

To disable a relationship plan:

6. View the relationship plans for a customer in the Plans Summary window. See Searching for Relationship Plans and Portfolios on page 17-4 for details.

7. Select the relationship plan you wish to disable.

8. Select the Inquiry tab. All customers assigned to this relationship plan are displayed.

9. Select the customer.

10. Click Disable to disable this relationship plan for the selected customer. The Status of this relationship plan for this customer changes from Assigned to Disabled. This action is automatically recorded in the Relationship Audit History.

    The Disable button changes to Enable.

11. Click Save on the toolbar.

17.10 Customizing a Relationship Plan for a Specific Customer

Use this procedure to create a customized version of a relationship for an individual customer.

To customize a relationship plan for a specific customer:

1. Display the relationship plan in the Plans Summary tab. See Finding Relationship Plans for a Customer for details.

2. Select a relationship plan.

3. Select the Inquiry tab. It displays all customers assigned to this relationship plan.

4. Select a customer.

5. Click Customize.

    The Customize Plan window appears.

6. Enter a unique name in the Plan Name field.

7. In the Plan Type region, make sure the Custom radio button is selected.

8. You can modify the Plan Criteria region which specifies the qualifying condition for the plan:

    a. The Profile Check field displays the name of the profile check that collects data about your customer. Profile checks are set up by the application's administrator, so do not change the value here without an understanding of the profile checks set up for your organization.

    b. You can modify the operator by selecting a different one using the Operator drop-down list.

    c. Depending on the operator you chose, you can modify the Low value, the High value, or both.

9. If you have the prerequisite programming and applications knowledge for creating relationship plans, then select the Plan Details tab and modify other plan conditions or actions according to the procedures described in the in the Setting Up Relationship Plans section of the *Oracle TeleService Implementation Guide*.

10. Click Save on the toolbar to save your new plan.

18

Communicating With Your Customers

This chapter discusses the different ways you can use Oracle TeleService to communicate with your customers via telephone, e-mail, and Web and how to end a customer interaction.

The overview section explains what functionality Oracle TeleService provides for each communication channel. The remaining topics provide details about each:

- Using Telephony in Oracle TeleService
- Communicating Via E-mail
- Communicating Through the Web
- Viewing Information About a Call
- Wrapping Up a Call
- Ending an Interaction Without Entering Call Wrap Up Information

18.1 Overview

Oracle TeleService makes it possible for you to interact with your customers via:

- Telephone
- E-mail
- Web

18.1.1 Telephone

Oracle TeleService telephony integration helps you to:

- Handle inbound calls

- Call customers who have requested a call back on the Web

- Call customers directly

Handling Inbound Calls

Integration with Oracle Advanced Inbound, and the Oracle Universal Work Queue, makes it possible for agents to automatically receive customer calls with information about the callers and the service requests they are calling about.

While you are talking to the customer, you can transfer the call and the customer information to other agents or queues, or you can conference other agents into the call to help you. If you are logged into the Contact Center, you can transfer calls to Tier-1 agents who are logged into the Contact Center, or to specialists who are logged into the Service Request window. If you are logged into the Service Request window, you can transfer calls to other agents who are using the Service Request window, or to Tier-1 agents who are using the Contact Center.

It is also possible for agents logged into either the Contact Center or the Service Request window to transfer calls to users logged into the Oracle E-Business Center.

Calling Customers Who Have Requested Assistance on the Web

The application also makes it possible for you to call customers who have requested an agent to call them back by filling in the Oracle iSupport Web Callback page.

From the Contact Center, the application dials the number and displays information about the customer, including the question they are asking on the Note tab of the Contact Center window.

From the Service Request window, the application dials the number and displays information about the customer, including the question they are asking on the Notes region of the Workbench tab.

Calling Customers Directly

The application makes it possible to dial customers and customer contacts with the click of a button or by entering customer numbers manually into the icWork Controller (Softphone) to make outgoing calls.

18.1.2 E-mail

If you are in the Service Request window or the Contact Center, Oracle TeleService integration with Oracle eMail Center makes it possible for you to compose an e-mail with the click of a mouse button. Depending on where you launch the Oracle

e-mail Center's Compose window, the application automatically fills in the addressees and context about a service request you are e-mailing about.

The e-mails you send are recorded in Oracle E-Business Suite's Interaction History. This makes it possible for you to review any e-mails sent to a customer about a service request directly from the Service Request window or you can use the extensive full-text search capabilities of the Oracle eMail Center itself to find the e-mail you are looking for.

18.1.3 Web

You can use the notes functionality provided by the Oracle E-Business Suite to communicate with your customer about a service request. Both you and the customer can view notes the other has entered when reviewing the service request.

Your administrator can set up notifications that notify either party when the service request has been updated. In this case, you will only receive a notification if someone other than yourself (the agent) creates or updates a service request.

18.2 Using Telephony in Oracle TeleService

Oracle TeleService relies on the Oracle Universal Work Queue and its icWork Controller (Softphone) for its telephony functionality, so you must understand and follow the detailed user procedures described in the *Oracle Universal Work Queue User Guide*.

The topics and procedures in this section a highlight a few aspects of telephony important to Oracle TeleService.

- Receiving Inbound Calls on page 18-3
- Sharing Customer Information While Conferencing or Transferring Calls on page 18-16
- Handling a Web Callback on page 18-18
- Switching Between Web Callback and Inbound Queues on page 18-21.
- Quitting the Application When Telephony Is Enabled on page 18-21.

18.2.1 Receiving Inbound Calls

When someone calls your organization, Oracle Advanced Inbound tries to determine the caller's identity based on the phone number or the information the caller has provided to the Interactive Voice Response (IVR) system. Customers can

enter a unique identifier, such as an order number, and a call reason, such as to create a service request. The application behaves differently depending on the information provided by the customer.

No matter what information the application displays about the customer, the agent must always verify that it is correct. The caller may be calling from someone else's phone or about someone else's service request, or has made a mistake in entering the service request number that just happens to match an existing service request number.

18.2.1.1 Unique Customer or Contact

When the caller's phone number matches a unique customer or contact phone number, the application displays that party's record in the Contact Center.

Your administrator can also set up the application to display the Service Request module. If the customer is making an inquiry, the Find Service Request window appears with a list of the open service requests for that Party. If the customer is calling to log a service request, the Service Request window appears with the party details entered.

18.2.1.2 Multiple Customers and Contacts

When the caller's phone number matches the phone number of more than one customer or contact, the application displays the Customer Search window within the Contact Center, populated with all the matching records. This can occur when a number of people share the same phone line or when the contact's phone number is the same as the phone number of the organization that the contact works for.

You must select one of the parties listed and click OK.

The party you select depends on the context of the call.

For example, suppose the number the caller is calling from matches:

- The main phone number of your customer General Technologies (a party of Organization)

- The personal phone number of Mel Bordeaux (a party of Person)

- The work number of Mel Bordeaux who works for General Technologies. (Contact for General Technologies)

You select different party types depending on what the caller is calling about:

If the caller:	You select:
Is the person listed and is calling with a personal request	The party of Person. This is the individual listed without affiliation to any organization.
Is the person listed and is calling with a request on behalf of the organization	The person with a relationship to the organization.
If you determine the caller is not the person listed.	The organization itself.

Your administrator can also set up the application to display the Find Service Request window, which displays a listing of the matching service requests for the party.

18.2.1.3 When No Customer or Contact Records Match

When the application does not find any matches for the caller's phone number or the other information the caller has provided, you receive a blank window in either the Contact Center or the Service Request window, depending on how your administrator sets up the application.

In the case of the Contact Center, you must search for the customer record manually by using the lists of values in the Contact Center header or the Customer Search window, which is available by clicking Search on the toolbar.

In the case of the Service Request window, if the caller is making an inquiry on an existing service request, the Find Service Request window appears. You can perform a search of existing service requests in the Find Service Request window. If the caller wishes to log a service request, a blank Service Request window appears, so that you can create a new service request.

18.2.1.4 When a Caller Enters a Unique Identifier or Call Reason

Customers can enter both a unique identifier, such as an order number, as well as a call reason, such as to create a service request. The information the customer enters determines the behavior of how the Contact Center or Service Request forms open.

In the Contact Center, the default tab and mode depends on the setup of the application and the information the customer enters into the IVR.

- If the customer enters a call reason, this information determines the default tab and the mode.

- If the customer does not enter a call reason, the identifier is used to determine the default tab and mode.

In the Service Request window, the identifier and/or the call reason determine the form and the mode. The default tab within the Service Request window is determined by a profile option.

Contact Center IVR Parameters

If your administrator has set up the application to default the Contact Center, customers can select one of the following identifiers within the IVR:

- Customer Number (Customer Party Number)
- Contact Number (Contact Party Number)
- Account Code (Customer Account Number)
- Contract Number
- Invoice Number
- Order Number
- RMA Number
- Serial Number
- Service Request Number
- Social Security Number
- Instance Name
- Tag Number
- System Name

Contact Center Call Reasons

Customers can select one of the following call reasons within the IVR:

- InquireSR: to inquire about a service request.
- CreateSR: to create a service request.
- InquireOrder: to inquire about an order number.
- InquireContract: to inquire about a contract number.
- InquireInvoice: to inquire about an invoice number.

- InquireIB: to inquire about an item instance.

- InquireRMA: to inquire about an RMA number.

Contact Center: IVR and Call Reasons Matrix

The following matrix is intended to help you to understand the various combinations of IVR parameters and call reasons that a customer can enter, as well as to describe the intended behavior of the application.

Table 18–1   Contact Center: IVR and Call Reasons Matrix

Unique identifier entered into IVR by the customer:	Call reason selected by the customer:	Is there a match with the unique identifier in the system?	What is the defaulting form?
Account Code	None	Yes	Contact Center opens with customer information and default tab.
Account Code	None	No	Contact Center opens with default tab. (blank)
Account Code	None	Yes (multiple parties)	Customer Search window opens with multiple matches.
Customer Number	None	Yes	Contact Center opens with customer information and default tab.
Customer Number	None	No	Contact Center opens with default tab. (blank)
Customer Number	None	Yes (multiple parties)	Customer Search window opens with multiple matches.
Contact Number	None	Yes	Contact Center opens with customer information and default tab.
Contact Number	None	No	Contact Center opens with default tab. (blank)
Contact Number	None	Yes (multiple parties	Customer Search window opens with multiple matches.
Service Request	None	Yes	Contact Center opens with customer information and the Service Request tab defaulted*

Table 18–1   Contact Center: IVR and Call Reasons Matrix

Unique identifier entered into IVR by the customer:	Call reason selected by the customer:	Is there a match with the unique identifier in the system?	What is the defaulting form?
Service Request (no value entered)	None	No	Contact Center opens with default tab. (blank)
Service Request (invalid value entered)	None	No	Contact Center opens with default tab. (blank) Message appears stating the search returned no results.
Service Request	None	Yes (multiple parties)	Customer Search window opens with multiple matches.
Serial Number	None	Yes	Contact Center opens with customer information and the Service Request tab defaulted*
Serial Number (no value entered)	None	No	Contact Center opens with default tab. (blank)
Serial Number (invalid value entered)	None	No	Contact Center opens with default tab. (blank) Message appears stating the search returned no results.
Serial Number	None	Yes (multiple parties)	Customer search window opens with multiple matches.
RMA Number	None	Yes	Contact Center opens with customer information and the Service Request tab defaulted*
RMA Number (no value entered)	None	No	Contact Center opens with default tab. (blank)

Table 18–1   Contact Center: IVR and Call Reasons Matrix

Unique identifier entered into IVR by the customer:	Call reason selected by the customer:	Is there a match with the unique identifier in the system?	What is the defaulting form?
RMA number (invalid value entered)	None	No	Contact Center opens with default tab. (blank) Message appears stating the search returned no results.
RMA Number	None	Yes (multiple parties)	Customer Search window opens with multiple matches.
Instance Name	None	Yes	Contact Center opens with customer information and the Service Request tab defaulted*
Instance Name (no value entered)	None	No	Contact Center opens with default tab. (blank)
Instance Name (invalid value entered)	None	No	Contact Center opens with default tab. (blank) Message appears stating the search returned no results.
Instance Name	None	Yes (multiple parties)	Customer Search window opens with multiple matches.
System Name	None	Yes	Contact Center opens with customer information and the Service Request tab defaulted*
System Name (no value entered)	None	No	Contact Center opens with default tab. (blank).
System Name (invalid value entered)	None	No	Contact Center opens with default tab. (blank) Message appears stating the search returned no results.

Table 18–1   Contact Center: IVR and Call Reasons Matrix

Unique identifier entered into IVR by the customer:	Call reason selected by the customer:	Is there a match with the unique identifier in the system?	What is the defaulting form?
System Name	None	Yes (multiple parties)	Customer Search window opens with multiple matches.
Tag Number	None	Yes	Contact Center opens with customer information and the Service Request tab defaulted*
Tag Number (no value entered)	None	No	Contact Center opens with default tab. (blank)
Tag Number (invalid value entered)	None	No	Contact Center opens with default tab. (blank) Message appears stating the search returned no results.
Tag Number	None	Yes (multiple parties)	Customer Search window opens with multiple matches.
Order Number	None	Yes	Contact Center opens with opens with customer information and the Orders tab defaulted*
Order Number (no value)	None	No	Contact Center opens with default tab. (blank).
Order Number (invalid value entered)	None	No	Contact Center opens with default tab. (blank) Message appears stating the search returned no results.
Order Number	None	Yes (multiple parties)	Customer Search window opens with multiple matches.
Contract Number	None	Yes	Contact Center opens with opens with customer information and the Contracts tab defaulted*

Table 18–1   Contact Center: IVR and Call Reasons Matrix

Unique identifier entered into IVR by the customer:	Call reason selected by the customer:	Is there a match with the unique identifier in the system?	What is the defaulting form?
Contract Number (no value)	None	No	Contact Center opens with default tab. (blank).
Contract Number (invalid value entered)	None	No	Contact Center opens with default tab. (blank) Message appears stating the search returned no results.
Contract Number	None	Yes (multiple parties)	Customer Search window opens with multiple matches.
Invoice Number	None	Yes	Contact Center opens with opens with customer information and the Invoice tab defaulted*
Invoice Number (no value)	None	No	Contact Center opens with default tab. (blank).
Invoice Number (invalid value entered)	None	No	Contact Center opens with default tab. (blank) Message appears stating the search returned no results.
Invoice Number	None	Yes (multiple parties)	Customer Search window opens with multiple matches.
Social Security Number	None	Yes	Contact Center opens with opens with customer information and the Dashboard tab defaulted*
Social security Number (no value)	None	No	Contact Center opens with default tab. (blank).

Table 18–1   Contact Center: IVR and Call Reasons Matrix

Unique identifier entered into IVR by the customer:	Call reason selected by the customer:	Is there a match with the unique identifier in the system?	What is the defaulting form?
Social Security Number (invalid value entered)	None	No	Contact Center opens with default tab. (blank) Message appears stating the search returned no results.
Any	InquireSR	Yes	Contact Center Opens with the Service Request tab defaulted in inquire mode.
Any	InquireSR	No	Contact Center Opens with the Service Request tab defaulted in inquire mode.
Any	InquireSR	Yes (multiple parties)	Contact Center Opens with the Service Request tab defaulted in inquire mode.
Any	CreateSR	Yes	Contact Center Opens with the Service Request tab defaulted in create mode.
Any	CreateSR	No	Contact Center Opens with the Service Request tab defaulted in create mode.
Any	CreateSR	Yes (multiple parties)	Contact Center Opens with the Service Request tab defaulted in create mode.
Any	InquireIB	Yes	Contact Center opens with the Install Base tab defaulted.
Any	InquireIB	No	Contact Center opens with the Install Base tab defaulted.
Any	InquireIB	Yes (multiple parties)	Contact Center opens with the Install Base tab defaulted.
Any	InquireRMA	Yes	Contact Center opens with the Service Request tab defaulted in inquire mode.

Table 18–1   Contact Center: IVR and Call Reasons Matrix

Unique identifier entered into IVR by the customer:	Call reason selected by the customer:	Is there a match with the unique identifier in the system?	What is the defaulting form?
Any	InquireRMA	No	Contact Center opens with the Service Request tab defaulted in inquire mode.
Any	InquireRMA	Yes (multiple parties)	Contact Center Opens with the Service Request tab defaulted in inquire mode.
Any	InquireIB	Yes	Contact Center opens with the Install Base tab defaulted.
Any	InquireIB	No	Contact Center opens with the Install Base tab defaulted.
Any	InquireIB	Yes (multiple parties)	Contact Center opens with the Install Base tab defaulted.
Any	InquireOrder	Yes	Contact Center opens with the Orders tab defaulted.
Any	InquireOrder	No	Contact Center opens with the Orders tab defaulted.
Any	InquireOrder	Yes (multiple parties)	Contact Center opens with the Orders tab defaulted.
Any	InquireInvoice	Yes	Contact Center opens with the Invoices tab defaulted.
Any	InquireInvoice	No	Contact Center opens with the Invoices tab defaulted.
Any	InquireInvoice	Yes (multiple parties)	Contact Center opens with the Invoices tab defaulted.
Any	InquireContract	Yes	Contact Center opens with the Contract tab defaulted.
Any	InquireContract	No	Contact Center opens with the Contract tab defaulted.

Table 18–1   Contact Center: IVR and Call Reasons Matrix

Unique identifier entered into IVR by the customer:	Call reason selected by the customer:	Is there a match with the unique identifier in the system?	What is the defaulting form?
Any	InquireContract	Yes (multiple parties)	Contact Center opens with the Contract tab defaulted.

* Indicates this tab is seeded as the default, but can be changed with a profile option.

Service Request IVR Parameters

If your administrator has set up the application to default the Service Request module, customers can select one of the following identifiers within the IVR:

- Service Request Number

- Account Code (Customer Account Number)

- Serial Number

- Tag Number

- Customer Number (Customer Party Number)

- RMA Number

- Contract Number

Service Request Call Reasons

Customers can select one of the following call reasons within the IVR:

- InquireSR: to inquire about a service request.

- CreateSR: to create a service request.

Service Request: IVR and Call Reasons Matrix

The following matrix is intended to help you to understand the various combinations of IVR parameters and call reasons that a customer can enter, as well as to describe the intended behavior of the application.

Table 18–2   Service Request: IVR and Call Reasons Matrix

Unique identifier entered into IVR by the customer:	Call reason selected by the customer:	Is there a match with the unique identifier in the system?	What is the defaulting form?
Account Code	InquireSR	Yes	Find Service Request Lists all open service requests.
Account Code	InquireSR	No	Find Service Request
Account Code	CreateSR	Yes	Create Service Request Defaults party details.
Account Code	CreateSR	No	Create Service Request (blank mode)
Customer Number	InquireSR	Yes	Find Service Request Lists all open service requests.
Customer Number	InquireSR	No	Find Service Request
Customer Number	CreateSR	Yes	Create Service Request Defaults party details.
Customer Number	CreateSR	No	Create Service Request (blank mode)
Serial Number	InquireSR	Yes	Find Service Request Lists all open service requests.
Serial Number	InquireSR	No	Find Service Request
Serial Number	CreateSR	Yes	Create Service Request form Defaults instance details.
Serial Number	CreateSR	No	Create Service Request (blank mode)
Tag Number	InquireSR	Yes	Find Service Request Lists all open service requests.
Tag Number	InquireSR	No	Find Service Request
Tag Number	CreateSR	Yes	Create Service Request form Defaults instance details.
Tag Number	CreateSR	No	Create Service Request (blank mode)

Table 18–2 Service Request: IVR and Call Reasons Matrix

Unique identifier entered into IVR by the customer:	Call reason selected by the customer:	Is there a match with the unique identifier in the system?	What is the defaulting form?
RMA Number	InquireSR	Yes	Service Request Opens main service request.
RMA Number	InquireSR	No	Find Service Request
Contract Number	CreateSR	Yes	Find Service Request Lists all open service requests.
Contract Number	CreateSR	No	Find Service Request
Contract Number	InquireSR	Yes	Create Service Request Defaults party details.
Contract Number	CreateSR	Yes	Create Service Request (blank mode)
Service Request Number	InquireSR	Yes	Service Request Opens main service request.
Service Request Number	InquireSR	No	Find Service Request

18.2.2 Sharing Customer Information While Conferencing or Transferring Calls

While working in the Contact Center or the Service Request window, you can use the icWork Controller to transfer or conference a customer together with the customer information displayed on your screen to Tier-1 agents using the Contact Center or specialists using the Service Request window. It is also possible for agents logged into either the Contact Center or the Service Request window to transfer calls to users logged into the Oracle E-Business Center.

For example, if you are transferring or conferencing a call while working on a service request in the Contact Center's Service Request tab, the application displays the same Service Request tab and Contact Center information for the second agent. You can also pass service key information or unique identifiers entered in the IVR by the customer. This ensures that the customer does not need to repeat identifying information.

> **Note:** Conferencing is not the same as screen sharing. Screen sharing permits two or more people to work together while sharing the same screen. This conferencing feature displays the same customer information to a second agent, but both of you continue to work in independent windows so you do not see what the other agent is doing.

If you have multiple windows open, the application displays the Contact Center for the second agent regardless if it is active. For example, if you are viewing a customer's service request in the Service Request window and have the Contact Center in the background, the transfer or conference call uses the Contact Center window.

> **Note:** If you are using the Contact Center or the Service Request window and your administrator has turned on standard security, you should be aware that service request security is enforced during transferring and conferencing of calls. If you try to transfer a call for a service request to another agent, the agent will not be able to receive the call if he does not have access to the service request type. This also applies to conferencing.

Prerequisites

You must be on the phone with a customer.

To transfer customer information when conferencing or transferring a call:

1. Click Save on the toolbar to save any work you are doing. This ensures the second agent receives the latest information.

2. Transfer or conference the call using the Softphone as described in Using the icWork Controller section of the *Oracle Universal Work Queue User Guide*. This procedure is slightly different depending on the type of telephony hardware your organization uses.

3. Two agents cannot work on the same record at the same time, so if you do continue to work after the conference or transfer is initiated, you must ensure that you are not both updating the same information.

Both agents can create notes and tasks because these create separate records, for example, but they cannot modify the customer's address or contact information at the same time. If you do attempt to modify the same record, only one of you will be able to save your work.

4. End your interaction with the customer either by clicking the End Interaction or Call Wrap-up buttons.

    If your administrator has set up your application to make call wrap up mandatory, and you select End Interaction, a pop-up window appears that you must complete before you can end the interaction. After you enter the wrap up information, you have wrapped up the call and you will not need to click End Interaction.

    > **Note:** If you wish to see the results of any work done by the second agent, you must requery the customer record.

18.2.3 Handling a Web Callback

Use this procedure to call a customer in response to question they have entered on the Web. Customers can request an agent to call them back by filling out a Web form in iSupport with their phone number, the time they wish to be called, and their question.

When you are logged into the Web Callback work queue in the Universal Work Queue, the application automatically dials the customer number for you and displays customer details in either the Contact Center or the Service Request window. The customer's question appears as a note.

Prerequisites:
You must log into the Web Callback queue in the Universal Work Queue.

To handle Web callbacks:
1. When you are assigned a Web callback, the Contact Center appears automatically showing the details of the customer who requested the callback. The application dials the customer number displayed in the icWork Controller (Softphone).
2. Click the flashing green line button on the Softphone to talk with the customer.
3. Select the Notes tab to view the customer's question.

4. When you are done speaking with the customer, then close the interaction either by clicking End Interaction or Call Wrap-up icon on the toolbar to indicate you are ready for the next call back.

    If your administrator has set up your application to make call wrap up mandatory, and you select End Interaction, a pop-up window appears that you must complete before you can end the interaction. After you enter the wrap up information, you have wrapped up the call and you will not need to click End Interaction.

Prerequisites:

You must log into the Web Callback queue in the Universal Work Queue.

To handle Web callbacks in the Service Request window:

1. When you are assigned a Web callback, the Service Request window appears automatically showing the details of the customer who requested the callback. The application dials the customer number displayed in the icWork Controller (Softphone).

2. Click the flashing green line button on the Softphone to talk with the customer.

3. Select the Workbench tab to view the customer's question.

4. When you are done speaking with the customer, then close the interaction either by clicking End Interaction or Call Wrap-up icon on the toolbar to indicate you are ready for the next call back.

    If your administrator has set up your application to make call wrap up mandatory, and you select End Interaction, a pop-up window appears that you must complete before you can end the interaction. After you enter the wrap up information, you have wrapped up the call and you will not need to click End Interaction.

18.2.4 Calling Customers

The application makes it possible to dial customers with the click of a button or by entering customer number manually into the icWork Controller (Softphone) to make outgoing calls.

You can initiate a call to a customer from the Contact Center and the Service Request window.

18.2.4.1 Calling Customers from the Contact Center

Use the following procedures to initiate a call to customer from the Contact Center.

Prerequisite

You must log into UWQ and select a customer with a phone number.

To initiate a call from the Contact Points tab:

1. Display the Customer in the Contact Center.

2. Select a telephone phone number from the list of contact points.

   This activates the Initiate Call button.

3. Select the Initiate Call button

   The icWork Controller window appears, and dials the telephone number automatically.

   > **Note:** You can also initiate a call to the primary phone number from the Contact Center header and the Report menu respectively.
   >
   > - From the Contact Center header select, Initiate Call button to the right of the Phone field.
   >
   > - From the Report menu, select Initiate Call.

18.2.4.2 Calling Customers from the Service Request Window

You can initiate a call from the following places within the Service Request window:

- From the toolbar: using the Call Customer icon.

- From the toolbar: using the Call Contact icon.

- From the Service Request header: using the Phone icon next to Contact Phone.

- From the Service Request header: using the Phone icon next to Customer Phone.

Prerequisite

You must log into UWQ and select a a service request with a customer or contact phone number.

To initiate a call from the Service Request window

1. Navigate to the Service Request window.

2. Query a service request.

3. Select the Initiate Call button to the right of the Phone field for either the customer or the contact.

   The icWork Controller window appears, and dials the telephone number automatically.

   > **Note:** You can also initiate a call to the Customer's primary phone or the Contact's primary phone from the toolbar.
   >
   > - Select the Customer Phone icon from the toolbar.
   >
   > - Select the Contact Phone icon from the toolbar.

18.2.5 Switching Between Web Callback and Inbound Queues

When you wish to switch media queues, from handling incoming calls to placing outbound Web callbacks or vice versa, you must remember to always click the Stop Media button before selecting the next queue. This ensures you are recognized by the application as ready to receive the next call.

To switch between Web Callback and Inbound queues:

1. Navigate to the Universal Work Queue.

2. Click Stop Media on the toolbar.

3. Select the next queue.

18.2.6 Quitting the Application When Telephony Is Enabled

Use the following procedure when you wish to close the application down at the end of the day or when you go on a break.

To quit the application:

1. Save your work.

2. Close any interactions.

3. Close the Contact Center and Service Request windows.

4. Navigate to the Universal Work Queue.

5. Click Stop Media in the toolbar.

6. Close the Universal Work Queue window. This closes the icWork Controller (Softphone) automatically.

18.3 Communicating Via E-mail

This topic provides an overview of the e-mail capabilities and covers the following user procedures:

- Composing and Sending an E-mail to a Customer or Contact on page 18-24

- Finding and Viewing E-mail Communications with Customers on page 18-25

- Viewing E-mails Sent to Customers on page 18-25

- Viewing E-mails Sent Regarding Specific Service Requests on page 18-28

About Sending E-mails to Customers or Contacts

You can send an e-mail to a customer or a customer contact from the Contact Center and Service Request windows and from the Oracle Applications' toolbar whenever you see the Open E-mail Compose Window icon enabled.

The Service Request window displays icons to send e-mails. You can initiate an outbound e-mail in the Service Request window from the following places:

Service Request toolbar

- Select the first Open Email Compose window icon to send e-mail to contact.

- Select the second Open Email Compose window icon to send e-mail to customer.

Service Request header

- Select Open Email Compose Window button to the right of the Contact Email field.

- Double click on e-mail address in the Contact Email field.

- Select Open Email Compose Window button to the right of the Customer e-mail address.

- Double click on the e-mail address in the Customer Email field.

Address/Contacts tab of the Service Request window:

– Double click on an e-mail address in the Value field.

These actions launch the Oracle eMail Center's Compose page in your browser where you compose your e-mail.

The e-mail topics in this guide describe only the basic features of sending e-mail. For additional features and instructions, please see the *Oracle eMail Center User Guide*.

Automatic Prefill of E-mail Addresses and Service Request Context

The application fills in different information, including e-mail addresses and service request information, depending on where you launch the Compose window.

If you wish to send e-mails to both the contact and customer displayed in the Contact Center header, for example, you can click the Open Email Compose Window icon to get the application to fill in the customer's primary e-mail address in the To: addressee field and the contact's primary e-mail address in the Cc: field.

If you launch the same compose window by clicking the icon to the right of the contact's E-Mail field, the application fills in the contact's e-mail into the To: addressee field and leaves the Cc: field blank.

The following table lists some of the key launching points for the e-mail Compose window that take advantage of the automatic prefill feature:

To send:	Where to Launch the Compose Window:
A general e-mail to a customer and contact	Navigate to the Contact Center and click Open Email Compose Window on the toolbar.
A general e-mail to a contact	Navigate to the Contact Center and click Open Email Compose Window next to the contact you wish to e-mail.
A general e-mail to a customer	Navigate to the Contact Center and click Open Email Compose Window next to the customer you wish to e-mail.
An e-mail about a specific service request to a service request contact	Navigate to the Service Request window and click the Open Email Compose Window icon next to the Contact Email field in the Service Request header. The subject line of the e-mail automatically populates with information about the service request.

To send:	Where to Launch the Compose Window:
An e-mail about a specific service request to the customer's primary e-mail address and the primary contact	Navigate to the Service Request window header and click the Open Email Compose Window icon next to the customer's Email field.
	The application populates the customer's primary e-mail address in the To: field and the e-mail address of the primary contact in the Cc: field.
	The subject line of the e-mail automatically populates with information about the service request.

18.3.1 Composing and Sending an E-mail to a Customer or Contact

Use this procedure to compose an e-mail to a customer or a contact.

To compose an e-mail to a customer or contact:

1. If you are sending an e-mail regarding a service request, then:

    a. Display the service request in the Service Request window.

    b. Click on the icon next to the Email field.

    The Oracle eMail Center's Compose page opens in a new browser.

    Information about the service request appears in the subject line. This includes a tag which makes it possible for the Oracle eMail Center to track any customer replies to your e-mail as part of the same thread.

    Note: If you invoke the Compose window using an Open Email Compose Window icon in the toolbar, you can expect the following behavior based upon where you are in the form:

    - If you are working in Contact region of the header, the contact e-mail address appears in the eMail Center To: field.

    - If you are working in the Customer region of header, the customer email address appears in the eMail Center To: field.

    - If you are working in neutral region, such as a tab, the Contact and Customer e-mail addresses appear in the To: field.

    ---

2. If you are sending an e-mail to the customer that is not related to a specific service request, then:

    a. Display the customer in the Contact Center window.

    b. Click Open Email Compose Window next to any e-mail address field or on the toolbar.

       The Oracle eMail Center's Compose page opens in a new browser window.

3. Compose your message in the Compose page.

Depending on your implementation, you may be able to use different e-mail templates displayed to the right of the compose area. For detailed information about how to use this and other Oracle eMail Center features see the *Oracle eMail Center User Guide.*

4. Click Send.

18.3.2 Finding and Viewing E-mail Communications with Customers

Oracle TeleService makes it possible for you to find and view e-mail communications with customers by using the Interactions tabs in the Contact Center and Service Request windows:

■ To view all e-mails sent to a customer, display the customer in the Contact Center and follow the instructions in Viewing E-mails Sent to Customers on page 18-25.

■ To view e-mails sent to a customer regarding a specific service request as well as any follow-up replies from the customer, display the service request in the Service Request window, and follow the steps described in Viewing E-mails Sent Regarding Specific Service Requests on page 18-28.

> **Note:**   You can only view e-mails sent from Oracle TeleService. E-mails you send to customers using your own e-mail application cannot be viewed through either Oracle TeleService or Oracle eMail Center.

For features such as full-text searching and the ability to view threads of e-mails on a particular topic, you must use the Oracle eMail Center. See *Oracle eMail Center User Guide* for more information.

18.3.3 Viewing E-mails Sent To Customers

Use this procedure to search for and view general e-mails sent to customers.

If the e-mail you wish to view is about a service request, then instead use the procedure described in Viewing E-mails Sent Regarding Specific Service Requests on page 18-28.

To view e-mails sent to customers:

1. Display the Customer in the Contact Center.

2. Select the Interactions tab.

   The top half of the tab displays all of the interactions with the customer.

   Each time you send an e-mail through the Oracle eMail Center, the application records an interaction with an entry in the Outcome column of `Email Composed`.

   Selecting an interaction in the top half of the tab, displays information about the e-mail, including its subject line, in the Activity Details region.

3. If you do not have a large number of interactions recorded for this customer, then you can look for the e-mail directly on the tab using the tools available by right-clicking with your mouse:

   a. Place your cursor in the Outcome column.

   b. Right-click on any of the records and select Find in Table.

      The Find CSC Interactions window appears.

   c. Enter `Email` and click **Find**.

      The table takes you to the first "Email Composed" interaction record.

      Information about the e-mail displays in the Activity Details region (the bottom half of the tab). The e-mail subject appears in the Subject field. You may have to scroll to the right to see it.

   d. If this e-mail is the one you wish to view, then double-click on the e-mail record in the Activity Details region. Otherwise repeat the search.

      The e-mail message appears in a browser window.

4. If you have a large number of interactions recorded for this customer, then click All Interactions and follow the procedure outlined in Finding Customer E-mails on page 18-27.

18.3.4 Finding Customer E-mails

Use this procedure to search for e-mails sent to or from a customer within Oracle TeleService. You can only use this procedure to search for e-mails recorded in Interaction History. This means only those e-mails sent from E-Business Suite applications and those sent by customers in response.

To find customer e-mails:

1. Display the Customer in the Contact Center.

2. Select the Interactions tab.

3. Click All Interactions.

   The Customer Interaction search window appears.

4. Select the Activities Filtering Criteria tab.

5. Select EMAIL from the Mode Type list of values.

6. If you know the approximate dates of the e-mail, then enter a date range in the Start Date and End Date fields.

7. Select either INCOMING or OUTGOING from the Direction drop-down list.

8. Click Search.

9. The table below displays the results of your search. The subject line of the e-mail appears in the Media Data field.

10. You can search for the e-mail you want by any keyword in the subject line:

    a. Place your cursor in the Media Data column.

    b. Right-click on any of the records and select Find in Table.

       The Find An MD Source for JTFIHGUI window appears.

    c. Enter a key word from the subject line in the Find What field.

    d. Click Find.

       The table takes you to the first e-mail subject line that matches your search record. If this is not the e-mail you wish to review, then repeat the search.

11. If the e-mail was sent regarding a service request, you can display the service request in the Service Request window by clicking on the link in the Object Function column.

18.3.5 Viewing E-mails Sent Regarding Specific Service Requests

Use this procedure to view e-mails that have been sent regarding a specific service request.

To find and view e-mails regarding specific service requests:

1. Display the service request in the Service Request window.

2. Select the Interactions tab.

    The top half of the tab displays all of the interactions regarding this service request.

    Each time you send an e-mail through the Oracle eMail Center from the Service Request window, the application records an interaction with an entry in the Outcome column of `Email Composed`.

    An interaction is also created when an automatic notification is sent to a customer contact. The interaction is created between the Automated service request system and the customer contact.

    Selecting an interaction in the top half of the tab, displays information about the e-mail, including its subject line, in the Activity Details region.

3. Search for an interaction of type `Email Composed` in the top half of the tab using the tools available by right-clicking with your mouse:

    a. Place your cursor in the Outcome column.

    b. Right-click on any of the records and select Find in Table.

        The Find CSC Interactions window appears.

    c. Enter `Email` and click **Find**.

        The table takes you to the first "Email Composed" interaction record.

        Information about the e-mail displays in the Activity Details region (the bottom half of the tab). The e-mail subject appears in the Subject field. You may have to scroll to the right to see it.

    d. If this e-mail is the one you wish to view, then double-click on the e-mail record in the Activity Details region. Otherwise repeat the search.

        The e-mail message appears in a browser window.

4. If you have a large number of interactions recorded for this customer, then click All Interactions and follow the procedure outlined in Finding Customer E-mails on page 18-27.

18.4 Communicating Through the Web

You and your customers can communicate via the Oracle E-Business Suite's notes feature regarding a service request the customers are tracking in their Web portal.

This topic covers:

- Overview on page 18-29
- Displaying a Service Request on the Web on page 18-29
- Displaying a Note for the Customer About a Service Request on page 18-29.
- Viewing Notes a Customer Has Added to a Service Request on page 18-30.

18.4.1 Overview

Customers can see any service request note you create with the status of Publish when they view the service request on their Oracle iSupport Web portal. You can view any notes a customer has added to the service request in the Workbench tab of the Service Request window.

18.4.2 Displaying a Service Request on the Web

If you wish to display a service request for customer review on the Web, then you must select the Publish Flag in the Service Request window header.

18.4.3 Displaying a Note for the Customer About a Service Request

Use this procedure to enter a note for the customer about a service request.

Prerequisites

You can only communicate with customers who are using Oracle iSupport to track their service requests.

To display a note for the customer about a service request:

1. Display the customer service request in the Service Request window.
2. Navigate to the Workbench tab.
3. Click New.
4. Optionally, select a Note Type to classify the note you are writing.
5. Select Publish from the Status drop-down list.

6. Enter the note you wish your customer to see.

7. Click Save on the toolbar.

The customer can see your note in the Service Request Log section of the Service Request Detail page.

18.4.4 Viewing Notes a Customer Has Added to a Service Request

For information on viewing notes, refer to Using Notes in Service Requests on page 11-37.

Prerequisites

You can only communicate with customers who are using Oracle iSupport to track their service requests.

To view notes a customer has added to a service request:

1. Display the customer service request in the Service Request window.

2. Select the Log and Notes button in the Service Request header.

   The Log Notes window appears.

   > **Note:** You can also launch the Log Notes window from the:
   >
   > - Workbench tab of the Service Request window, by selecting the Log and Notes button.
   > - Service Request tab of the Contact Center, by selecting the Log button.

3. Select the Notes check box. (Leave the others unselected.)

4. Click Refresh.

The log displays all of the notes for this service request, including any entered by the customer.

18.5 Viewing Information About a Call

Use this procedure to view information about a call of a customer on the phone.

Prerequisites

Oracle Inbound telephony must be implemented and a customer must be on the phone.

To view information about a call:

1. Click the Call Information icon on the toolbar of either the Contact Center header or the Service Request header. This is the icon with a telephone and the letter "i".

    The Information Window appears displaying information about the call. This includes information gathered automatically by Oracle Inbound and that entered by callers themselves.

2. Close the window by clicking **Close** on the window's title bar. This is the button in the upper right-hand corner that is standard in all applications.

18.6 Wrapping Up a Call

Use this procedure to record outcomes of your interaction with a customer and to review and update the activities recorded by the application.

Your administrator can set up the application to make call wrap up mandatory.

Prerequisites

An interaction must be in progress. You can tell if an interaction is in progress when the End Interaction icon in the toolbar is enabled. This is the traffic light icon with a red light.

To wrap up a call:

1. Click Call Wrapup in the toolbar of either the Contact Center window or the Service Request window.

    The Call Wrap Up window appears displaying the activities that will be recorded in the interaction history.

2. If you wish to modify any of the listed activities, then make alternate selections using the list of values provided. Each activity can have its own outcome and result.

3. Not all customer-related activities are recorded automatically. If you wish to add additional activities to be recorded as part of your interaction, then:

    a. Click New in the toolbar.

    b. Use the lists of values (LOVs) to record the Action, Action Item.

    c. Enter the outcome of the activity using the Outcome LOV.

    d. Optionally enter the Result and Reason.

4. Click OK.

Clicking OK ends your interaction and signals your telephony application that you are ready to accept the next call.

18.7 Ending an Interaction Without Entering Call Wrap Up Information

Use this procedure to end an interaction without entering call wrap-up information. The application automatically records the default outcome, result, and reason for the interaction.

Prerequisites

An interaction must be in progress. You can tell if an interaction is in progress when the End Interaction icon in the toolbar is enabled. This is the traffic light icon with a red light.

To wrap up a call:

Click End Interaction in the toolbar. This is the stoplight icon with the red light.

If your administrator has set up your application to make call wrap up mandatory, and you select End Interaction, a pop-up window appears that you must complete before you can end the interaction. After you enter the wrap up information, you have wrapped up the call and you will not need to click End Interaction.

19

Useful Utilities

This section explains the use of utilities available from the Tools and Tools1 menus.

Topics covered include:

- Entering Results into an Oracle Quality Plan
- Faxing or E-Mailing a Service Request
- Managing Service Request Workflows
- Viewing the History of Changes Made in a Service Request
- Messaging Using Oracle Workflow
- Recording Counter Readings
- Escalating Service Requests and Tasks
- Speeding Up Access to Other Applications Using the Quick Menu
- Running a Script to Guide You Through a Customer Interaction

19.1 Entering Results into an Oracle Quality Plan

You can enter results into a Quality Plan directly from a service request.

Prerequisites

You must define a quality plan.

To enter Oracle Quality results:

1. Navigate to the Service Request window.

2. Display a service request.

3. From the Tools menu, select Enter Quality Results.

For additional information please refer to *Oracle Quality User's Guide.*

19.2 Faxing or E-Mailing a Service Request

You can send a service request by e-mail or fax using Oracle One-to-One Fulfillment.

Prerequisites
Oracle One-to-One Fulfillment must be implemented.

To fax or e-mail a copy of a service request:
1. Navigate to the Service Request window.
2. Create a service request or query an existing service request.
3. From the Tools menu, select Fulfillment Request.

   The Fulfillment Requests window opens.
4. Select either the Email or Fax delivery method.
5. Enter the e-mail address or fax number.
6. Click Submit to send the service request to the fulfillment server.
7. Select the View tab to see the status of your submission.

19.3 Managing Service Request Workflows

Your administrator can set up a service request type to automatically launch an Oracle Workflow process whenever the service request is created or to permit agents to do so manually.

You can tell if a workflow process is running for a service request by checking the status of the Active Workflow check box located near the bottom right of the service request header.

If this check box is not visible, you can view the entire header by clicking Maximize or Minimize the Header (the right-arrow button on the top right corner of the Service Request window).

You can manually launch workflows for service request types that are set up for manual launching of workflow processes. See Manually Launching a Service Request Workflow on page 19-3.

You can abort any Workflow process already running. See Aborting a Workflow on page 19-3.

19.3.1 Manually Launching a Service Request Workflow

You can manually launch or abort an Oracle Workflow process from within a service request.

Prerequisites

The service request type must be set up to permit manual launching.

To launch a Workflow process:

1. Navigate to the Service Request window.

2. Create a service request or query an existing service request.

3. From Tools menu, select Launch Workflow.

    The Caution dialog box appears.

4. Click OK to start the workflow.

19.3.2 Aborting an Oracle Workflow Process

Use this procedure to abort a workflow process launched from a service request. Administrators can set up service request types to automatically launch Oracle Workflow processes whenever service requests of that type are created or permit agents to start them manually.

Prerequisites

The workflow process must be running as indicated by a checked Active Workflow check box located near the bottom right of the service request header

To abort a workflow:

1. Navigate to the Service Request window.

2. Open a service request or create a new service request.

3. From the Tools menu, select Abort Workflow.

   4. Click **Yes** to stop the workflow.

19.4 Viewing the History of Changes Made in a Service Request

You can view an audit trail of a service request using the Audit History window, which is accessible from the Tools1 menu

You can view the history of changes made to the following:

- Account
- Bill To Account Number
- Bill To Party
- Bill To Site
- Bill To Contact
- Channel
- Contract Number
- Customer
- Database
- Database Version
- Error
- Expected Resolution Date
- Incident Address
- Incident Occurred Date
- Covered Site
- Inventory Organization
- Operating System
- Original Order Number
- Owner
- PO Num
- Platform Version
- Product Revision

- Problem Code

- Project

- Publish

- Resolution Code

- Resolution On

- Responded On

- Revision

- Sales PO Number

- Severity

- Ship-to Account Number

- Ship-to Address

- Ship-to Party

- Ship-to Contact

- Sub-component Version

- System

- Ticket Number

- Tier Version

- Type

- Urgency

To view an audit of changes in a service request using the Audit History window:

1. Navigate to the Service Request window.

2. Display an existing service request.

3. From the Tools1 menu, select Request Audit.

   The Audit History window appears.

4. Enter the beginning and ending date for the audit in the Duration fields.

5. Select the service request field you want to audit from the Audit field list of values. You may also select All.

The window displays the history of changes made to the field.

> **Note:** The Audit History window displays all audited service
> request header attributes. The history includes the name of the
> person who made the change, the date and time when it was made,
> and the value both before and after the change.

19.5 Messaging Using Oracle Workflow

You can send and receive messages regarding a service request using Oracle
Workflow. For example, you can request a recipient to take an action and require
him or her to indicate whether the action is accepted, rejected, or completed. You
can choose to have a confirmation sent to you after the recipient has responded.

This topic overs:

- Sending a Message on page 19-6

- Viewing and Responding to Messages on page 19-7

- Viewing Message History for a Service Request on page 19-8

19.5.1 Sending a Message

Use this procedure to send a message using Oracle Workflow.

Prerequisites

Oracle Workflow must be configured before you can send messages.

To send a message:

1. Navigate to the Service Request window.

2. Create a service request or display an existing service request.

3. From the Tools menu, select Send Message.

   The Send Message window appears.

4. Enter the sender's name in the From field using the list of values.

   You can select from all roles defined for use with Oracle Workflow. The default
   value is the Workflow display name of the current user; if the user's Workflow
   role cannot be determined, the FND user name defaults.

5. Select a priority from the list of values: High, Medium, or Low. Medium is the default value. These Priorities are not user-definable and are not related to Oracle Workflow notification priorities.

6. Optionally, select an Action from the list of values.

7. Enter the recipient's name in the To field. The recipient's name must be defined in Oracle Workflow roles.

8. Check Expand Roles if you plan to send this message to a Workflow role that includes several individuals and if you want each person to receive a copy of the message.

    ■   By default (if this box is not checked), one message is sent to the role as a whole. If one individual responds to or closes the message, the message is removed from the inbox of all other individuals in that role.

    ■   If you check Confirmation, you will not be able to check Expand Roles.

    ■   If you entered an Action, you will not be able to check Expand Roles. The reason for disabling the Expand Roles function is because you may not want all of the recipients to perform the same action.

9. Optionally, check Confirmation if you want to receive a confirmation message once the recipient has responded to your message.

    ■   If you check Confirmation, the From field is validated to ensure that the sender is a valid Workflow role.

    ■   If you check Expand Roles, you will not be able to check Confirmation.

10. Enter your message text.

11. Click **Send** to pass the message to Oracle Workflow for delivery and processing.

    The application displays a dialog box informing you that the message was sent successfully.

19.5.2 Viewing and Responding to Messages

Messages will also appear in the Universal Work Queue along with other Oracle Workflow notifications. They may also appear in your e-mail application, a Web page or Oracle Workflow Notification Summary window, based upon your Oracle Workflow configuration.

If your administrator has set up automatic notifications, the following occurs:

- The From field in the message body indicates that the message has been sent from the Automated Service Request System, unless the value has been changed by your administrator.

- The interaction appears in the Interactions Tab of the service request, however you cannot drill down to view the content of the notification. In this case, the notification appears as an interaction between the Automated Service Request System (unless the value has been changed by your administrator), and the recipient of the notification.

To view and respond to messages:

1. Navigate to Service Requests > Workflow Notifications.

   The Worklist page opens in a browse window.

2. Select the message you wish to view.

   If the message does not include an action request, you must respond with Acknowledge. Otherwise, choose one of the following responses:

   - *Accept* if you accept the responsibility of performing the requested action.

   - *Reject* if you reject the responsibility of performing the requested action.

   - *Done* if you have completed the action.

3. Optionally enter additional comments, such as your reason for rejecting the request.

4. Select OK. A confirmation message will be sent to the original message's sender if and only if the sender checked Confirmation.

19.5.3 Viewing Message History for a Service Request

Use this procedure to view the messages sent about a service request in the message history.

To view message history for a service request:

1. Navigate to the Service Request window.

2. Open a service request.

3. From the Tools menu, select View Message.

The Message History window appears, displaying sender, recipient, and response information for all messages that were sent concerning the service request.

19.6 Recording Counter Readings

From within service requests you can update any counters associated with an installed base item. You may wish to use this procedure, for example, if your organization is servicing a copy machine and you charge the customer based on the number of copies that have been made.

Prerequisites

The service request must be for an installed base item that has a counter defined.

To record counter readings:

1. Navigate to the Service Request window.

2. Create a service request or display an existing service request for the installed base item.

3. From the Tools menu, select Counter Capture. The Counter Capture window opens.

4. Enter the New counter value, miscellaneous reading information or reset the counter.

5. Click Save on the toolbar.

19.7 Escalating Service Requests and Tasks

This topic explains how to escalate service requests and tasks. It covers:

- About Escalations on page 19-9

- Escalating a Service Request on page 19-10

- Escalating a Service Request Task on page 19-11

19.7.1 About Escalations

Using the escalation functionality of the Oracle E-Business Suite, you can create an escalation document for critical situations involving one or more service requests and tasks. The escalation document raises awareness and enables swift action to manage and resolve the situation.

You can assign the document to an owner, and use it to track information related to the escalation including additional contacts and all actions taken toward resolution.

The current escalation level of a service request is displayed in the Escalation field on the Service Request window. You must scroll down on the header region of this window to view this field. By default, each service request is given the default of Not Escalated. Different escalation levels can be color-coded for visibility by your administrator.

For more detailed information about using escalation management, see the *Oracle Common Application Components User's Guide.* For setup information, please see the *Oracle Common Application Components User's Guide* and the *Oracle TeleService Implementation Guide.*

19.7.2 Escalating a Service Request

Use this procedure to escalate a service request.

To escalate a service request:

1. Create a service request or display an existing service request in the Service Request window.

2. From the Tools menu, select Request Escalation.

   The Escalations window opens.

3. The customer and service request information defaults.

4. Select a status code that fits the status of the escalation.

5. Select a reason code that describes the reason for the escalation.

6. Date Opened is automatically populated with the current date.

7. Date Closed is automatically populated when the escalation is closed.

8. Optionally, enter a date in Target Date for closing the escalation.

9. Select the Escalation Level from the list of values.

10. The Escalation Owner is the party responsible for managing the escalation. Assign the escalation to a resource using one of these two methods:

    - Select a resource from the list of values.

    - Click Assign to select an escalation owner using the Oracle Assignment Manager.

11. Summarize the reason for the escalation in the Escalation Summary field.

12. In the Contacts tab, enter the customer or employee contact who is requesting the escalation and check the Requester box.

13. Optionally enter additional contact points.

14. Optionally add more reference documents to the escalation.

15. Optionally click Notes to create a note about the escalation.

16. Optionally click Tasks to create a task related to managing the escalation.

17. Click Save to assign an escalation number. Notifications are sent based upon the escalation management setup and system profile options.

19.7.3 Escalating a Service Request Task

Using the escalation functionality you can create an escalation document for critical situations involving one or more tasks in a service request. The escalation document raises awareness and enables swift action to manage and resolve the situation. The escalation document is assigned to an owner, tracks the business situation information, requester, additional contacts, and all actions taken toward resolving the situation. The escalation document can also identify or escalate related service requests, defects and tasks, as required.

To escalate a service request task:

1. Navigate to the Service Request window.

2. Create a service request or query an existing service request.

3. Select the Tasks tab.

4. Select the task to escalate.

5. From the Tools menu, select Task Escalation. The Escalations window opens.

   The customer and service request information defaults.

6. Select a status code that fits the status of the escalation.

7. Select a reason code that describes the reason for the escalation.

8. Date Opened is automatically populated with the current date.

9. Date Closed is automatically populated when the escalation is closed.

10. Optionally enter a date in the Target Date field for closing the escalation.

11. Select the Escalation Level from the list of values.

12. The Escalation Owner is the party responsible for managing the escalation. Assign the escalation to a resource using one of these two methods:

    ■ Select a resource from the list of values.

    ■ Click Assign to choose an escalation owner using Oracle Assignment Manager.

13. Enter a reason for the escalation in the Escalation Summary field.

14. In the Contacts tab, enter the customer or employee contact who is requesting the escalation and select the Requester box.

15. Optionally enter additional contact points.

16. Optionally add more reference documents to the escalation.

17. Optionally, click Notes to create a note about the escalation.

18. Optionally, click Tasks to create additional tasks related to managing the escalation.

19.8 Speeding Up Access to Other Applications Using the Quick Menu

You can use the Quick Menu to navigate to quickly navigate to windows in other applications and pass on customer and other information from the current window. This saves you from having to change responsibilities and performing queries again to display the same information.

For example, if you are working in a service request for a product a customer owns, you can display information about that product from Oracle Install Base with two clicks of the mouse.

Only certain Quick Menu-enabled applications preserve the context in the new window. Contact your administrator for more information.

Prerequisites

Your responsibility must enable you to access the application you wish to open.

To access other applications using the Quick Menu:

1. Display a customer in the Contact Center or a service request in the Service Request window.

2. From the Tools menu, select Quick Menu.

   The Quick Menu window appears.

3. Double-click the desired menu option. A new window opens and, where available, defaults in specific information from the customer record or service request.

19.9 Running a Script to Guide You Through a Customer Interaction

Use this procedure to run a script to guide you through an interaction with a customer.

Prerequisites:

Your application administrator must create the scripts using Oracle Scripting.

To run a script:

1. Select either Script from the Tool menu (if you are in the Contact Center window) or Scripting from the Tools1 menu (if you are in the Service Request menu.

   The Oracle Scripting window appears.

2. Select the script you wish to run from the Script Name/Language drop-down list.

3. Click Execute.

20

Using Charges

This topic group provides process-oriented, task-based procedures for using the Charges module of Oracle TeleService to perform essential business tasks. It covers:

- Overview of Charges

- Process Overview

- Charges Functions

- Creating Estimates for Customers

- Creating a Charge Line

- Understanding Automatic Submission of Field Service Charges

- Viewing the Status of Submitted Orders and Invoices

- Creating a Return

- Reviewing and Submitting Field Service Charges for Billing

- Viewing Pending Charges for Field Service Tasks

- Viewing the Source of a Charge Line

- Viewing a Report of Charges for a Service Request

20.1 Overview of Charges

Service organizations that use Oracle Order Management can use Charges to create orders, ship products, and bill customers for services provided in response to support service requests, field service requests, and depot repairs.

Agents can also use Charges to process customer returns of defective products for repair, credit, or replacement. With Charges you can manage customer expectations while controlling inventory receipts and processing customer credit.

Suppose, for example, that a customer logs a service request for a malfunctioning computer system. After trying to correct the problem remotely, a technician is dispatched to fix the problem on site. The technician replaces some components, and finally ascertains that the problem lies with a major subcomponent that cannot be fixed in the field. The technician ships the subcomponent back to the repair depot for in-house repair, and the subcomponent is repaired and shipped back to the customer. At that point, a field technician is dispatched again to install the subcomponent.

With Charges you can consolidate all labor, material, and expenses incurred during remote support, field service, and depot repair into a single order with multiple lines. Customers can be billed for labor, materials, and expenses either while a service request is being addressed or after one is resolved.

Before you bill customers for services rendered, Charges takes into account and correctly applies contractual terms such as discounts and labor rates to arrive at final charges for a customer. For example, field technicians enter the start and end times for a task and Charges automatically uses the appropriate contract or the default time and material labor schedule to calculate how much the customer owes. In doing so, Charges takes into account different labor rates, for example, regular time, overtime, and double time.

Charges uses Service business processes and Service activity codes to determine the impact of each charge line. Examples of such codes include repair, return, material transaction, labor transaction, expense transaction, and expense travel. Your organization can define an unlimited number of service activity codes.

20.2 Process Overview

The following diagram provides an overview of the Charges process and describes the integration of Charges with other modules.
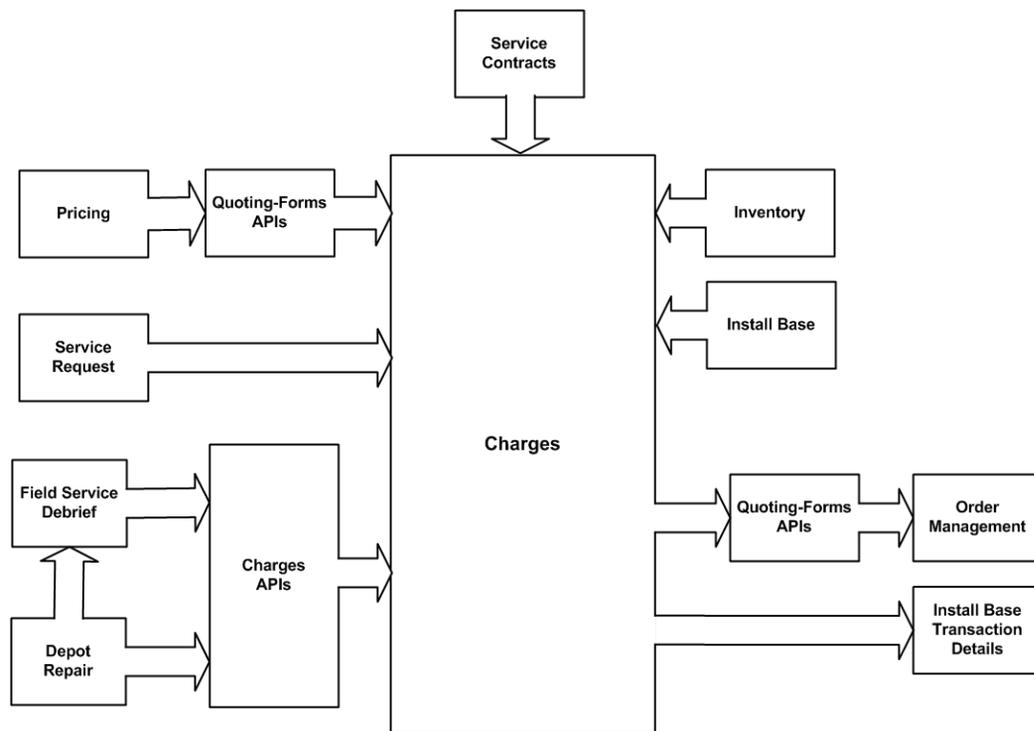
Charges integrates with Oracle Order Management for returns, shipments, and billing through APIs provided by Oracle Quoting - Forms. When you submit an order to Oracle Order Management, the application uses the Oracle Quoting - Forms APIs to create the order in Oracle Order Management. Oracle Quoting - Forms APIs then give you a confirmation number that is displayed in the Order Number field of the Order Status subtab. After the invoice cycle is complete, the invoice number and the invoice date are also displayed on the Order Status subtab in the Invoice Number and Invoice Date fields respectively. If an order line is split in Oracle Order Management, then Charges displays the status of the first line only.

Oracle TeleService, Oracle Service Contracts, Oracle Inventory, and Oracle Install Base integrate directly with Charges, whereas Oracle Field Service debrief, Oracle Advanced Pricing, and Oracle Depot Repair communicate with Charges through Charges APIs. Oracle Advanced Pricing communicates with Charges through Quoting - Forms APIs.

20.3 Charges Functions

This section provides an overview of the subtabs and important charges fields and functions.

The following table describes the subtabs and various functions in the Charges tab, through which you can enter and view charges.

Subtab Name	Function
Action	View, edit, and enter the activity type and specify quantity for the charge line. Activities include, for example, labor, expenses, and returns.
Item Instance	View and edit information for charge lines related to installed base items.
Pricing	View and adjust pricing information derived from the pricing rules.
Pricing Rules	View and edit the information that controls the way an item is priced.
Bill To	View and modify billing information. This is defaulted from the service request's Address tab.
Ship To	View and modify shipping information. This is defaulted from the service request's Address tab.
Order Details	View and edit additional information for creating an order.
Order Status	View information about an order submitted to Oracle Order Management.
Source	If a charge line originates from an Oracle Field Service debrief or from an Oracle Depot Repair repair order, you can view the original documents from this tab.

The following table describes the functions of buttons and check boxes in the Charges tab.

Name of Button or Check Box	Function
Auto Generate	Pulls in-progress lines from Field Service Debrief. The button allows a billing clerk to determine the charges incurred thus far on a task that has not yet been completed. The charge lines created when this button is selected have a charge line type of In-Progress and are only temporary. When the task has been completed, these lines are overwritten by the actual charges incurred by the customer.
Charge Line Status Details	Displays a note with the details for a particular line status. This note can be used to review field service charges that have been restricted or failed automatic submission criteria to be inspected manually.
Charges Report	Displays a simple Charges report that contains basic information about charge lines related to a specific service request.
Copy to Actual	Copies an estimate line and creates a new actual charge line.
Display Contract	Allows you to look at the coverage for the currently selected charge line, using the Contracts Coverage window.
No Charge	Determines whether a charge line should be submitted to the customer for billing.
OM Interface check box	Causes the charge line to be eligible for an order in Order Management. If this box is cleared, then the charge line will not result in an order line when charges are submitted. Its default value is determined based on the setup of the service activity code.
Rollup check box	Using this check box agents can group charge lines under the generic headings of time, material, or expenses. This way the different charge lines for pens and for stationery appear on the invoice as expenses and the charge lines for straight time, overtime, and time and half appear under the simple heading of time. Selecting the Rollup check box, substitutes the generic inventory item on the customer invoice. The administrator must set this substitution up in the Billing Type Attributes setup window.
Display Source Details	Opens the current source document shown in the Source tabbed page.

Name of Button or Check Box	Function
Submit	Submits to Oracle Order Management all charge lines of type Actual that have not yet been submitted and have the OM Interface check box selected.
	Creates orders and order lines and records changes in the Oracle Install Base installation details.

The following table describes defaults for items in the Charges tab.

Field	Default
Billing Currency	The Charges API uses the currency derived from the default price list to convert the Service Debrief transaction currency into the charge line billing currency. This conversion is based on the standard conversion rate for the two currencies involved.
Business Process	This Service business process defaults from the value defined in the Service Request Type setup if the Service: Charges - Default Business Process from the SR profile is set to `yes`.
Contract	Defaults from the contract selected on the service request if the Service business process selected on the charge line is covered by that contract.
Current Source Document and Number	Default from the parent document from which the charge line was created: the service request, the repair line, or the field service report
Operating Unit	Defaults using the rules defined in the Operating Unit Default window. The rules are described in the *Oracle Service Implementation Guide*. If the associated editability profile option, Service: Allow Charge Operating Unit Update, is selected, then you can edit the operating unit in the Charges window.
Original Source Document and Number	Default from the parent document from which the charge line was created: the service request, the repair line, or the field service report. They are not updatable.
Price List	Defaults from the selected contract. If the contract does not define a price list, then it is defaulted from the profile Service: Charges - Default Price list. If this profile is not set, then the price list is not defaulted.
Ship To and Bill To accounts	Default from the accounts selected on the parent service request.

Field	Default
Ship To and Bill To addresses	Default from the addresses selected on the parent service request.
Ship To and Bill To contacts	Default from the contacts selected on the parent service request.
UOM (unit of measure)	Defaults from the primary unit of measure for the Inventory item selected in the charge line.

The following table describes the codes used in Charges and other Service applications.

Code	Description
Billing Type	Oracle Inventory item attribute that indicates the type of item, including, material, labor, expense, and other user-defined types.
Service Business Process	Used to group service activity codes to be used for charge and contract purposes. On a charge line, after the Service business process has been selected, the Service Activity Codes LOV is limited to those types that are associated with the selected Service business process. On a contract, a coverage is created for a specific Service business process. In this way, you can control which service activity codes are covered by a contract. The contract LOV on the charge line is limited to those contracts that cover the selected Service business process. Examples of Service business processes are Field Service, Depot Repair, and Customer Support.
Order Management Mapping	Each service activity billing type maps to a specific type of Order Management order header and order line type. Because Order Management header and line types are not used across operating units, the Charges setup process allows a unique header and line type to be associated with a Service activity billing type for each operating unit. These are retrieved and used when orders are created in Oracle Order Management.
Service Activity	Indicates what the charge line is for. For example, return, installation, removal, or preventative maintenance.

20.4 Creating Estimates for Customers

Use this general procedure to create an estimate line in a service request.

Prerequisites

You must create a service request before you can create an estimate.

To create an estimate:

1. Display the service request in the service request window.

    The Service Request window appears.

2. Select the Charges tab.

3. Select the Actions subtab.

4. Select Estimate from the Charge Line list.

5. View or Edit the following fields:

    - Operating Unit

      Defaulted to the organization which recognizes the debit or credit from this charge line. The organizations you can select from are specified by the administrator.

    - Business Process

      Defaulted by the service request type. The business process determines which contracts apply and the level of coverage a customer may receive. For example, a customer may have a service agreement that covers labor for customer support, but not field service labor. The selection you make here determines the list of values (LOV) in the Service Activity field.

    - Service Activity

      Enter the purpose of this charge line, for example, Return, Labor, and Expenses. The selections are specified by your administrator.

    - Item

      Inventory number of the labor, material, or expenses item. You must make an entry in this field even if you are entering a charge line for an installed base item a customer is returning.

    - Revision

      Revision code for the inventory item. This field is enabled automatically when you enter an inventory item number that is revision controlled.

    - Billing Type

Read-only field that displays an Oracle Inventory item attribute. The type can be material, labor, expense, and other user-defined types.

- UOM

    Unit of measure. The value defaulted in this field depends on the item you selected.

- Quantity

    The number of items.

6. Select the Save icon from the toolbar.

    The Total Estimates field is populated with the estimated amounts of all estimate line items.

Turning Estimates into Actual Charges

Use this general procedure to turn an estimate line into a charge line.

Prerequisites

You must create an estimate to convert into a charge line.

To turn an estimate into a charge:

1. Select an estimate line.

2. Select the Copy to Actual button.

    A new charge line is added to the Actions subtab. The charge line type is actual, but all other information should be identical to the estimate line that you selected to copy.

    The Actual and In Progress Totals are updated.

20.5 Creating a Charge Line

Use this general procedure to create a charge line in a service request.

> **Note:** Different entries are required for creating a charge line for a physical item, such as return or a replacement, or for the billing of a customer for time, material, and expenses.

All of the steps required to complete returns for credit, replacement, and repair are outlined in Creating a Return on page 20-17.

Prerequisites

You must create a service request before you can create a charge against it.

To create a charge:

1. Display the service request in the service request window.

   The Service Request window appears.

2. Select the Charges tab.

3. Select the Action subtab.

4. View or edit the following fields:

   ■ Line

      Read-only charge line number

   ■ Charge Line Type

      Defaulted to Actual. Do not change this setting unless you are preparing an estimate that requires customer approval. (Any charge line you set to Estimate is not submitted to Oracle Order Management and does not appear on the customer's invoice.)

   ■ Operating Unit

      Defaulted to the organization which recognizes the debit or credit from this charge line. The organizations you can select from are specified by the administrator.

   ■ Business Process

      Defaulted by the service request type. The business process determines which contracts apply and the level of coverage a customer may receive. For example, a customer may have a service agreement that covers labor for customer support, but not field service labor. The selection you make here determines the list of values (LOV) in the Service Activity field.

   ■ Service Activity

      Enter the purpose of this charge line, for example, Return, Labor, and Expenses. The selections are specified by your administrator.

   ■ Item Number

Inventory number of the labor, material, or expenses item. You must make an entry in this field even if you are entering a charge line for an installed base item a customer is returning.

- Revision

  Revision code for the inventory item. This field is enabled automatically when you enter an inventory item number that is revision controlled.

- Billing Type

  Read-only field that displays an Oracle Inventory item attribute. The type can be material, labor, expense, and other user-defined types.

- UOM

  Unit of measure. The value defaulted in this field depends on the item you selected.

- Quantity

  If you are entering a return the quantity must be negative. If the return is for an installed base item, the quantity must be -1.

- Return Reason

  This field is enabled only if this line is for a return. Use it to select an appropriate return reason code.

The Unsubmitted and Total fields within in the Actuals and In Progress region are updated after you enter an item.

5. Select the Item Instance subtab.

6. If you are creating a charge line for an install base item, then you can view or enter the item by making a selection using one of the following LOVs:

   - Tag Number

     Customer's own installed base identification number.

   - Instance Number

     Oracle Install Base or Oracle Enterprise Install Base instance number.

   - Serial Number

     Item's serial number.

   The following fields are view-only:

   - Item number

- Revision

- Description

7. If you are creating a return, then you may enter a date by which the customer is supposed to return the item in the Return By Date field.

8. Select the Pricing subtab.

   Here you can view the list price for the item and modify it. If you do not want to charge the customer for this line, then select the No Charge check box.

   The Line, UOM, Qty, and Billing Currency are defaulted from other tabs.

   - List Price

     The price of the item price from the price list entered on the Pricing Rules subtab or, for expenses, the currency amount you entered in the Action tab.

   - Override Unit Price

     You can use this field to adjust the unit price.

   - Extended Price

     Read-only field that displays the Override Unit Price times the quantity.

   - Contract Discount Amount

     Read-only field that displays the discount from any applicable contract.

   - Net Price

     The extended price minus any contract discount. You can adjust this price which will be the price to appear on the customer invoice.

9. Select the Pricing Rules subtab.

10. View and edit the following:

    - Contract number

      Number of the contract which applies to this line. This is defaulted from the contract applied to the service request as a whole. You can view the details of the contract by clicking Coverage.

    - Coverage

      Read-only field detailing what the contract covers.

- Price list

  The price list used to determine the pricing of the item. The value defaults from the selected contract. If the contract does not define a price list, then it is defaulted from the profile Service: Charges - Default Price list. If this profile is not set, then the price list is not defaulted.

- Billing Currency

  Price list currency.

- Customer Purchase Order

  Number of the customer purchase order. This number will appear on the invoice.

- Rate Type

  You can choose a rate type for labor items. The Rate Type field is enabled if the combination of service activity code and billing type chosen is Labor.

11. The billing address for the customer invoice is defaulted from the service request Address tab. If you wish to modify the billing address then, select the Bill To subtab.

View and edit the following:

- Bill To Party

  Party that is to receive the invoice.

- Bill To Account

  Account that will be debited or credited for the transaction.

- Bill To Address

  Address where the invoice will be sent.

- Bill To Contact

  You can enter a contact here for information only. The contact does not get passed to Oracle Order Management.

12. Shipping information for the charge line is defaulted into the Ship To subtab from the service request Addresses tab. If you are shipping an item in this charge line and wish to view it or select a different address, then select the Ship To subtab.

- Ship To Party

Party that is to receive the shipment.

- Ship To Account

    Oracle Order Management requires an account number entered in this field to recognize the shipping address. The customer is not charged on this account.

- Ship To Address

    Address where the item will be sent.

- Ship To Contact

    You can enter a contact here for information only. The contact does not get passed to Oracle Order Management.

13. Select the Order Details subtab.

14. Optionally, select the shipping or receiving warehouse for the charge line. Leaving this field blank leaves it up to Oracle Order Management to determine the warehouse.

15. Verify that the OM Interface check box is selected if you want this charge line to be passed to Oracle Order Management.

    The default value for this check box is determined by the setup of the service activity code.

16. Optionally, you can:

    - Simplify customer invoices by grouping all charge lines under the generic headings of time, material, or expenses by selecting the Rollup check box. This way the different charge lines for pens and for stationery appear on the invoice as expenses, for example, and the charge lines for straight time, overtime, and time and half appear under the simple heading of time. Selecting the Rollup check box, substitutes the generic inventory item on the customer invoice. Your administrator must set this substitution up in the Billing Type Attributes setup window. See the *Oracle TeleService Implementation Guide* for details.

17. Select the Order Status tab to review a summary of the orders information for each submitted charge line.

18. After you have completed adding all of the charge lines for the service request, click Submit to submit the order to Oracle Order Management.

    The Submitted and Unsubmitted fields within the Actuals and In Progress region are updated.

> **Note:** You cannot update or resubmit charge lines after they have been submitted. Submitted charge lines appear as read-only.

19. In the Order Status subtab, you can view information about the order. This includes the order numbers where the different charge lines have been added and the status of each order.

> **Note:** Depending on the setup of you implementation, you may need to use Oracle Order Management to book the order as described by *Oracle Order Management User's Guide.* However, your administrator can set a profile option that will automatically create orders in Booked status.

20.6 Understanding Automatic Submission of Field Service Charges

Your administrator can set up Field Service charges to be submitted automatically, after certain defined criteria are met. Your administrator can:

- Set conditions so that charges are automatically submitted to Order Management. The application shows error messages for charges that are not submitted successfully. see:

   Troubleshooting Automatic Submission Error Messages on page 20-16.

   For example, your administrator can set the application to submit charges automatically only when all of the service request tasks are closed.

- Define charges that are exempt from automatic submission. Such charges can be reviewed manually, see:

   Submitting Charges Manually on page 20-16.

   For example, your administrator can restrict charges, if the total of all charges for the service request exceeds a defined amount.

   For information on setting up the automatic submission of field service charges refer to the *Oracle TeleService Implementation Guide.*

> **Note:** This feature works in conjunction with the Field Service Debrief module. Only charges generated from Oracle Field Service Debrief are eligible for automatic submission.

20.6.1 Troubleshooting Automatic Submission Error Messages

Use the following procedure to identify error messages.

Prerequisites

You must open a service request with restricted or failed charge lines from Field Service Debrief.

To troubleshoot automatic submission error messages:

1. Display the service request in the Service Request window.

2. Select the Charges tab.

3. Select the Action subtab.

4. Click the Charge Line Status Details button next to the Line Status field to identify charges that have been restricted or that have failed.

   A Note appears with the line status details.

5. Review the note and determine whether or not the charge line can be submitted manually.

6. Click Ok to close the note.

> **Note:** You can use the Find Service Request window to search for service requests containing charge lines of a particular status. For example, charge lines that have been restricted or have failed.

20.6.2 Submitting Charges Manually

Use the following procedure to submit charges manually.

Prerequisites

You must open a service request with eligible charge lines.

To submit charges manually:

1. Display the service request in the Service Request window.

2. Select the Charges tab.

3. Select the Action subtab.

4. Click the Charge Line Status Details button next to the Line Status field to identify charges that have been restricted or that have failed.

   A Note appears with the line status details.

5. Review the note and determine whether or not the charge line can be submitted manually.

6. Click Ok to close the note.

7. Verify that an Incident Address has been selected in the Service Request header.

8. Click Submit.

   The Type Status shows as Submitted.

20.7 Viewing the Status of Submitted Orders and Invoices

Use this procedure to view the progress of an order for charge lines that have been submitted to Oracle Order Management.

To view the status of orders and invoices:

1. Display the service request in the Service Request window.

2. Select the Charges tab.

3. Select the Order Status subtab.

   ■ The confirmation number is displayed in the Order Number field.

   ■ The Order Status field displays the status of the order. If an Oracle Order Management order line is split, when a part of the order is put on back-order, for example, then Charges displays the status of the first line.

   ■ The invoice number and the invoice date display in the Invoice Number and Invoice Date fields respectively.

20.8 Creating a Return

Oracle TeleService makes it possible for you to create three types of returns:

■ Return for Credit

   A customer wants to return an item and receive credit to their account. See Creating a Return for Credit on page 20-18.

■ Return for Replacement:

A customer wants to receive a replacement. See Creating a Return for Replacement on page 20-22.

- Return for Repair:

  The item is to be repaired. See Creating a Return for Repair on page 20-28.

  > **Note:** Charges is designed for service-related returns, not as a quoting or sales application. It uses the company's current price list rather than the original invoice or sales receipt for calculating customer credit.

20.8.1 Creating a Return for Credit

Use this procedure to create a return for credit. This type of return requires you to create just one charge line.

To create a return for credit:

1. Navigate to Service Requests > Create Service Requests.

   > **Note:** If you know of a similar service request, you can speed up the creation process by instead making a copy following the procedure described in Copying a Service Request on page 11-25

2. If you are creating a return for an inventory item, then:

   a. Select a customer. You can select a customer by name or by entering a single piece of identifying information such as the serial number of an installed base item, the customer's contract number, or the phone number. For details on the different service request entry points, see Selecting a Customer for a Service Request on page 11-27.

   b. Enter the inventory item using the Item or Desc field lists of values. The Item LOV lets you search by inventory number; the Desc field by item description.

   > **Note:** You must re-enter the item number again on the Charges tab later in this procedure.

3. If you are creating a return for an item in the customer's installed base, then:

     a. If you know the serial number or the installed base instance number, then enter them in the Serial or Instance fields using the LOVs provided.

     b. If you do not know the number you can search for it by clicking the Find icon to the right of the item field. For details, see Searching for and Displaying Installed Base Items on page 11-32.

4. In the Service Request window header, check to see if the Type, Status, and Severity fields display the correct values for the return in your service organization. If not, use the lists of values (LOVs) to select them. Contact your administrator for more information about the correct settings for your organization.

5. Select the Workbench tab and enter a summary of the customer problem in the Problem Summary field.

6. Save the service request by clicking Save in the toolbar.

7. Optionally, check to see if the product is still covered under a contract and the customer can return it. See Checking a Customer's Contract Coverage on page 11-30 for details.

8. Select the Charges tab.

9. Select the Action subtab.

10. Optionally, change any of the following defaulted fields:

     ■ Charge Line Type

     Do not change the default Actual setting unless you are preparing an estimate that requires customer approval. (Any charge line you set to Estimate does not appear on the customer invoice.)

     ■ Operating Unit

     The organization which recognizes the debit from this transaction.

     ■ Business Process

     Defaulted by the service request type. The business process determines which contracts apply and the level of coverage a customer may receive. For example, a customer may have a service agreement that covers labor for customer support, but not field service labor. The selection you make here determines the list of values (LOV) in the Service Activity field.

11. Using the Service Activity LOV, specify what the purpose of the charge line (for example: Return for Credit). The values in this LOV are determined by the administrator.

12. In Item Number, enter the inventory item number for the item being returned. You must do so even if you are creating the return for an item in the customer's installed base.

    Rev (Revision), Billing Type, and UOM (Unit of Measure) fields are populated automatically.

13. Enter the quantity of the item being returned as a negative number. If the item is tracked by the installed base then this quantity must be -1.

14. Select the Pricing subtab.

    The UOM and Quantity fields are carried over from the Activity tab.

    The currency displayed in the Billing Currency field is defaulted from the price list and may not represent the currency the customer actually paid in.

    The List Price reflects the price as listed on the price list; not necessarily what the customer paid for the item.

15. If you wish to adjust the unit price, you can do so by modifying the Override Unit Price.

    The Extended Price is the Override Unit Price multiplied by the quantity.

    If a contract applies, the contract discount appears in the Contract Discount Amount.

    The Net Price is the extended price minus the contract discount amount.

16. If you wish to adjust the total amount of credit the customer receives, you can do so by modifying the amount in the Net Price field.

17. If the item the customer is returning is registered in Oracle Install Base or Oracle Enterprise Install Base, then select the Item Instance tab and enter the item using the Instance Number or Tag Number LOVs.

    > **Note:** Entering an install base item does not automatically populate the item number in the Action tab.

18. On the Item Instance subtab, enter a date by which the customer is supposed to return the item in the Return By Date field.

19. The application automatically applies the billing address and other billing information you entered in the service request's Address tab. If you wish to

change it or review it, then select the Bill To subtab. You can make alternate selections using the lists of values provided:

- Bill to Party: this field is defaulted to the customer as it is normally the customer who receives credit for the return, but you can select a different party using the LOV.

- Bill to Address: the address where the customer will receive a confirmation.

- Bill to Contact: an optional contact. Any entry you make here is for information only and does not get passed to Oracle Order Management.

20. Select the Order Details subtab.

21. If you know the warehouse that will receive the return, then use the Shipping/Receiving Warehouse LOV to select it.

22. Do not select the Rollup check box as it does not apply to returns.

23. Oracle Order Management automatically adds the charge line to an open order, but if you wish to specify a specific order to add this transaction to, then:

   a. Select a an order from the Add to Order LOV.

   b. Enter an order number using the Order Number LOV.

24. Make sure the OM Interface check box is selected. This charge line is not sent to Oracle Order Management unless this check box is selected.

25. Save your entries by clicking **Save** on the toolbar.

26. Enter any additional return items as described above.

27. When you are done entering information about the items the customer wishes to return, then click **Submit.**

> **Note:** You can only use Oracle Order Management to modify the charge line after you submit it.

28. Select the Order Status subtab.

29. The Order Number field displays the RMA number you can give to the customer to use for their equipment return.

30. Use Oracle Order Management to book the order as described by *Oracle Order Management User's Guide*. Booking the order notifies the receiving warehouse to expect the return.

Your administrator can also set up the application to create orders in Booked status.

31. You can monitor the progress of the return by viewing the status displayed in the Line Status field on the Order Status subtab.

20.8.2 Creating a Return for Replacement

Use this procedure to create a return for replacement. This type of return requires you to create two charge lines: one for the item being returned and one for the replacement item to be shipped.

Submit only after you have entered both lines. The procedure for creating the first charge line is very similar to the procedure for creating a return for credit.

To create a return for replacement:

1. Navigate to Service Requests > Create Service Requests.

> **Note:** If you know of a similar service request, you can speed up the creation process by instead making a copy following the procedure described in Copying a Service Request on page 11-25

2. If you are creating a return for an inventory item, then:

    a. Select a customer in the Service Request window header. You can select a customer by name or by entering a single piece of identifying information such as the serial number of an installed base item, the customer's contract number, or the phone number. For details on the different service request entry points, see Selecting a Customer for a Service Request on page 11-27.

    b. Enter the inventory item using the Item or Desc field lists of values. The Item LOV lets you search by inventory number; the Desc field by item description.

> **Note:** You must re-enter the item number again on the Charges tab later in this procedure.

3. If you are creating a return for an item in the customer's installed base, then:

    a. If you know the serial number or the installed base instance number, then enter them in the Serial or Instance fields using the LOVs provided.

   b. If you do not know the number you can search for it by clicking the Find icon to the right of the item field. For details, see Searching for and Displaying Installed Base Items on page 11-32.

4. In the Service Request window header, check to see if the Type, Status, and Severity fields display the correct values for the return in your service organization. If not, use the lists of values (LOVs) to select them. Contact your administrator for more information about the correct settings for your organization.

5. Select the Workbench tab and enter a summary of the customer problem in the Problem Summary field.

6. Save the service request by clicking Save in the toolbar.

7. Optionally, check to see if the product is still covered under a warranty or contract and the customer can return it. See Checking a Customer's Contract Coverage on page 11-30 for details.

8. Select the Charges tab.

9. Create the first charge line for the return as described in Creating a Charge Line for the Return on page 20-24.

10. Create the second charge line for the replacement as described in Creating the Charge Line for a Replacement on page 20-26.

11. When you are done entering information about the items the customer wishes to return, then click Submit.

> **Note:** You can only use Oracle Order Management to modify the charge line after you submit it.

12. Select the Order Status subtab.

13. The Order Number field displays the RMA number you can give to the customer to use for their equipment return.

14. Use Oracle Order Management to book the order as described by *Oracle Order Management User's Guide*. Booking the order notifies the receiving warehouse to expect the return and the shipping warehouse to send out the replacement.

15. You can monitor the progress of the return by viewing the status displayed in the Line Status field on the Order Status subtab.

20.8.2.1 Creating a Charge Line for the Return

Use this procedure to create the charge line for the equipment the customer is returning.

To create a charge line for the return:

1. Select the Action subtab.

2. Optionally, change any of the following defaulted fields:

   - Charge Line Type

     Defaulted to Actual. Do not change this setting unless you are preparing an estimate that requires customer approval. (Any charge line you set to Estimate does not appear on the customer invoice.)

   - Operating Unit

     Defaulted to the organization which recognizes the debit from this transaction. This values is specified by the administrator.

   - Business Process

     Defaulted by the service request type. The business process determines which contracts apply and the level of coverage a customer may receive. For example, a customer may have a service agreement that covers labor for customer support, but not field service labor. The selection you make here determines the list of values (LOV) in the Service Activity field.

3. Using the Service Activity LOV, specify what the purpose of the charge (for example: Return for Replacement). The values in this LOV are determined by the administrator.

4. Enter the inventory item number for the item being returned. You must do so even if you are creating the charge line for an item in the customer's installed base.

   Rev (Revision), Billing Type, and UOM (Unit of Measure) fields are populated automatically.

5. Enter the quantity of the item being returned as a negative number. If the item is tracked by the installed base or serialized then this quantity must be -1.

6. Select the Pricing subtab.

   The UOM and Quantity fields are carried over from the Activity tab.

The currency displayed in the Billing Currency field is defaulted from the price list and may not be the same as the currency the customer used in payment.

The List Price reflects the price as listed on the price list; not necessarily what the customer paid for the item.

7. If you wish to adjust the unit price, you can do so by modifying the Override Unit Price.

   The Extended Price is the Override Unit Price multiplied by the quantity.

   If a contract applies, the contract discount appears in the Contract Discount Amount.

   The Net Price is the extended price minus the contract discount amount.

8. If you wish to adjust the total price or the amount of credit the customer receives, you can do so by modifying the amount in the Net Price field.

9. If the item the customer is returning is registered in Oracle Install Base or Oracle Enterprise Install Base, then select the Item Instance tab and enter the item using the Instance Number or Tag Number LOVs.

   > **Note:** Entering an install base item does not automatically populate the item number in the Action tab.

10. On the Item Instance subtab, enter a date by which the customer is supposed to return the item in the Return By Date field.

11. The application automatically applies the billing address and other billing information you entered in the service request's Address tab. If you wish to change it or review it, then select the Bill To subtab. You can make alternate selections using the lists of values provided:

    - Bill to Party: this field is defaulted to the customer as it is normally the customer who is responsible for payment or receives credit for the return, but you can select a different party.

    - Bill to Address: The billing address.

    - Bill to Contact: An optional contact. Any entry you make here is for information only and does not get passed to Oracle Order Management.

12. Select the Order Details subtab.

13. If you know the warehouse that will receive the return, then use the Shipping/Receiving Warehouse LOV to select it.

14. Do not select the Rollup check box as it does not apply to returns.

15. The application automatically adds the charge line to an open order, but if you wish to specify an order to add this transaction to, then:

    a. Select an order from the Add to Order LOV.

    b. Enter an order number using the Order Number LOV.

16. Make sure the OM Interface check box is selected. The charge line is not sent to Oracle Order Management unless it is.

17. Save your entries by clicking Save on the toolbar.

18. You are now ready to enter the item you are sending out as a replacement. See Creating the Charge Line for a Replacement on page 20-26.

20.8.2.2 Creating the Charge Line for the Replacement

Use this procedure to create the charge line for the replacement unit the customer is to receive.

To create the charge line for the replacement:

1. Select the Action subtab.

2. Optionally, change any of the following defaulted fields:

    - Charge Line Type

      Defaulted to Actual. Do not change this setting unless you are preparing an estimate that requires customer approval. (Any charge line you set to Estimate does not appear on the customer invoice.)

    - Operating Unit

      Defaulted to the organization which recognizes the debit or credit from this transaction. The available values are specified by the administrator.

    - Business Process

      Defaulted by the service request type. The business process determines which contracts apply and the level of coverage a customer may receive. For example, a customer may have a service agreement that covers labor for customer support, but not field service labor. The selection you make here determines the list of values (LOV) in the Service Activity field.

3. Using the Service Activity LOV, specify what the purpose of the charge line (for example: Replacement). The values in this LOV are determined by the administrator.

4. Enter the inventory item number for the item being shipped out as a replacement.

   Rev (Revision), Billing Type, and UOM (Unit of Measure) fields are populated automatically.

5. Enter the quantity of the item being shipped as a positive number.

6. Select the Pricing subtab.

   The UOM and Quantity fields are carried over from the Activity tab.

   The currency displayed in the Billing Currency field is defaulted from the price list.

   The List Price reflects the price as listed on the price list.

7. If you wish to adjust the unit price, you can do so by modifying the Override Unit Price.

   The Extended Price is the Override Unit Price multiplied by the quantity.

   If a contract applies, the contract discount appears in the Contract Discount Amount.

   The Net Price is the extended price minus the contract discount amount.

8. If you wish to adjust the total price, you can do so by modifying the amount in the Net Price field.

9. The application automatically applies the billing address and other billing information you entered in the service request's Address tab. If you wish to change it or review it, then select the Bill To subtab. You can make alternate selections using the lists of values provided:

   - Bill To Party: normally it is the customer who is responsible for payment or receives credit for the return, but you can select a different party.

   - Bill To Address: The billing address.

   - Bill To Contact: An optional contact. Any entry you make here is for information only and does not get passed to Oracle Order Management.

10. The application automatically copies the shipping address and other shipping information you entered in the service request's Address tab. If you wish to

change it or review it, then select the Ship To subtab and use the LOVs provided for updates:

- Ship To Party: Normally it is the customer who is responsible for paying the shipping, but you can select a different party.

- Ship To Address: The shipping address.

- Ship To Contact: An optional contact. Any entry you make here is for information only and does not get passed to Oracle Order Management.

11. Select the Order Details subtab.

12. If you know the warehouse that will do the shipping, then use the Shipping/Receiving Warehouse LOV to select it. Leaving this field blank lets Oracle Order Management choose the warehouse for you.

13. Do not select the Rollup check box as it does not apply to returns.

14. Oracle Order Management automatically adds the charge line to an open order, but if you wish to specify an order to add this transaction to, then:

    a. Select an order from the Add to Order LOV.

    b. Enter an order number using the Order Number LOV.

    Your administrator can also set up the application to create orders in Booked status.

15. Make sure the OM Interface check box is selected. The charge line is not sent to Oracle Order Management unless it is.

16. You are now ready to complete the return as described in Creating a Return for Replacement on page 20-22.

20.8.3 Creating a Return for Repair

To create a return for repair follow the procedure described in Creating a Return for Credit on page 20-18, but on the Pricing tab, select the No Charge check box. This sets the price to zero as the customer does not want credit for the return. The rest of the return for repair procedure is carried out in Oracle Depot Repair. See the *Oracle Depot Repair User Guide* for details.

20.9 Reviewing and Submitting Field Service Charges for Billing

Use this procedure to charge customers for field service tasks that have been debriefed and closed. Your administrator also can set up charges to be submitted

manually, so that you do not need to review and submit field service charges for billing.

Depot Repair charges are generally submitted using the Depot Repair Workbench.

You cannot update or resubmit charge lines after they have been submitted. Submitted charge lines appear as read-only.

Prerequisites

You must have a service request with debrief lines to review.

To review and submit field service charges for billing:

1. Display the service request in the Service Request window. See Displaying a Service Request for You to Work On on page 11-11 for details.

2. Select the Charges tab.

3. Review the charge lines displayed on the subtabs. If you wish to view the original debrief document for any charge line, then

4. Click **Submit**.

5. Select the Order Status subtab.

6. The Order Number field displays the reference number you can give to your customer.

7. Use Oracle Order Management to bill the customer as described by *Oracle Order Management User's Guide*.

20.10 Viewing Pending Charges for Field Service Tasks

Use this procedure to view pending charges for service request tasks that have been entered by field service agents but not yet closed.

Prerequisites

Field service technicians must complete the debrief for the tasks.

To view pending charges:

1. Display the service request in the Service Request window. See Displaying a Service Request for You to Work On on page 11-11 for details.

2. Select the Charges tab.

3. Click Auto Generate.

The application displays information on pending charges for all tasks with an in progress status. These are tasks that have been debriefed but not yet closed.

20.11 Viewing the Source of a Charge Line

If a charge line originates form a Oracle Field Service debrief or from an Oracle Depot Repair repair order, you can use this procedure to view the original documents.

To view the source of a charge line:

1. Display the service request in the service request window.

2. Select the Charges tab and the Source subtab.

3. Select the charge line.

4. If the charge line is for a repair, then the Original Source Doc field displays Service Request or Depot Repair, depending on where application the charge line was created.

   If the RMA or shipment line was created in Depot Repair, then click **Source** to display the depot repair order.

   If the RMA or shipment line was created in Charges, then:

   a. Select Depot Repair using the Current Source Doc list of values (LOV).

   b. Click Source to display the depot repair order.

5. If the charge line was created through an Oracle Field Service debrief, then click Source to display the debrief.

   The Original Source Doc displays Service Request and Current Source Doc displays Service Debrief. The number of the debrief document appears in the Current Source Number field.

20.12 Viewing a Report of Charges for a Service Request

Use this procedure to view a report of charges for a service request in a browser window.

To view a charges report:

1. Display the service request in the Service Request window. See Displaying a Service Request for You to Work On on page 11-11 for details.

2. Select the Charges tab.

3. Click Charges Report.

   The application displays a report of all the current charges for a service request in a browser window.

A

Useful Interface Tools

This appendix briefly describes a couple of useful Oracle Forms interface features designed to help you improve the efficiency of your work. For complete information on using the Oracle Forms interface please see the *Oracle Applications User's Guide*. It covers:

- Manipulating Data in Your Work Queue and Other Dynamic Tables
- About Customizing the Presentation of Data Using Folders

A.1 Manipulating Data in Your Work Queue and Other Dynamic Tables

Dynamic tables provide flexibility in displaying and handling data. Use them to track, sort, search, copy, and export data, and customize your display.

You can perform the following tasks in your Work Queue and other dynamic tables:

- Sorting Information in Dynamic Tables on page A-1
- Finding Information in Dynamic Tables on page A-2
- Copying Data from Dynamic Tables on page A-2
- Refreshing Data in Dynamic Tables on page A-3
- Customizing the Layout of Your Work Queue and Other Dynamic Tables on page A-3

A.1.1 Sorting Information in Dynamic Tables

Use this procedure to sort work in your work queue and other tables within Oracle TeleService.

Prerequisites

You can only perform this procedure in a dynamic table such as the Universal Work Queue.

Steps

1. If you want to sort on a field in the table, click the grey dot in the column header.

   The blue arrow that replaces the grey dot indicates a direction of order, for example, ascending, descending, alphabetical, or chronological order.

2. You can sort in the opposite direction by clicking the header arrow again.

A.1.2 Finding Information in Dynamic Tables

Use this procedure to find information in your Work Queue and other dynamic tables in Oracle TeleService.

Prerequisites

You can only perform this procedure in a dynamic table such as the Universal Work Queue.

To find information in dynamic tables:

1. Right-click any cell in the table.

2. Select Find in Table from the pop-up menu.

3. Type the characters want to search on into the text field.

4. Indicate whether to match case, and select the direction of the search, backward or forward.

5. Click Find.

6. You can click Cancel to stop a long running search.

A.1.3 Copying Data from Dynamic Tables

Use this procedure to copy a cell, selected rows, or all rows of data displayed in a dynamic table to the clipboard. You can then paste the data as tab-delimited text into a desktop application.

Prerequisites

You can only perform this procedure in a dynamic table such as the Universal Work Queue.

To copy information:

1. Select the data you want to copy.

2. Right-click any cell in the table.

3. From the pop-up menu, choose the appropriate option.

   When you insert the copied selection into a spreadsheet application, such as Microsoft Excel, the appropriate headers automatically migrate with the selection and appear as its first row. Rows are copied in a tab-delimited format.

Guidelines

Cells that display values as check marks or an X, display differently when copied and exported. Positive values are expressed as asterisks (*) and negative values do not display.

If you have customized your table to hide columns of data, these are not copied or exported.

A.1.4 Refreshing Data in Dynamic Tables

Use this procedure to refresh the data in a table. You will need to do this if you think new entries were created in a different window while you have the table open.

Prerequisites

You can only perform this procedure in a dynamic table such as the Universal Work Queue.

To refresh table data:

1. Right-click in the table.

   The table refreshes to reflect the latest information.

A.1.5 Customizing the Layout of Your Work Queue and Other Dynamic Tables

Use this procedure to adjust the layout of your Work Queue and other tables to accommodate your needs.

Prerequisites

You can only perform this procedure in a dynamic table such as the Universal Work Queue.

To customize table layout:

1. You can resize any column or row by placing your cursor at the edge of the header. When the double arrow appears, you can drag the column or row to the desired size.

2. If you want to change the order the columns, then:

   a. In a header, left-click and hold the mouse key down until a black box appears around the header.

   b. Move the header to the selected position. Allow for a delay before making the move.

3. If you want to hide a column from view, then:

   a. Right-click the header of the column you want to hide.

   b. Select Hide Column on the pop-up menu.

   > **Note:** Hidden information is not copied to the clipboard.

4. If you want to display columns which are hidden, then:

   a. Right-click any column header.

   b. Choose Show Column from the pop-up menu.

      A list of all currently hidden columns appears.

   c. Select all or only those columns you want to display.

5. To preserve changes you make to the table layout:

   a. Right-click a column header.

   b. From the pop-up menu, choose Customizations.

   c. From the submenu, choose Save.

6. If you want to restore default settings:

   a. Right-click a column header.

   b. From the pop-up menu, choose Customizations

    c.   From the submenu, choose Clear.

A.2 About Customizing the Presentation of Data Using Folders

You can customize the presentation of data in any window displaying a folder icon such as the Contact Center using standard Oracle Forms folder tools.

For example:

- To hide a field: Click with the right button of your mouse in the field and choose Folder > Hide Field from the pop-up menu.

- To show a hidden field: Click the right mouse button in the field directly above the place where you wish to display the extra field and choose Folder > Show Field.

- To move a field: Click the right mouse button in the field you wish to move and choose one of the following commands: Folder > Move Right, Folder > Move Left, Folder > Move Up, or Folder > Move Down.

> **Note:** The Show Field command places the new field directly below the cursor. You must therefore ensure there is enough blank space for the new field to display so it does not overlap and hide any fields which may appear below. You can do this by moving the other fields using one of the move commands.

You can save the custom layouts you create.

See the Customizing the Presentation of Data chapter in the *Oracle Applications User's Guide* for detailed instructions on how to use folder tools.