Oracle® Fulfillment Services

Implementation Guide

Release 11*i*

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Oracle Fulfillment Services Implementation Guide, Release 11*i*

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Preface

This implementation guide provides information and instructions to help you implement Oracle Fulfillment Services, a member of the Oracle E-Business Suite of applications, Release 11*i*.

Intended Audience

This guide is to be used by experienced system administrators and Oracle implementation consultants who understand Oracle applications. You must have an understanding of Oracle CRM and ERP applications before proceeding.

How This Guide is Organized

The first chapter is an Introduction to Fulfillment Services, including the concept of fulfillment and some of the key benefits to using Fulfillment Services.

The second chapter details the technology requirements and dependent applications, both required and optional for implementing Oracle Fulfillment Services.

The third chapter is an implementation overview describing the basic components of an implementation.

The fourth chapter gives the detailed steps required for completing an implementation.

The fifth chapter provides detailed steps for optional Administration Setups.

The sixth chapter gives the steps to creating a user of Fulfillment Services.

How to Use This Guide

This Guide is designed as a start to finish set of steps for implementing Oracle Fulfillment Services. Please read the Implementation Overview chapter to familiarize yourself with general concepts that will be used throughout the Guide, then follow the process outlined in Implementation Steps. Additional implementation information is contained in Administration Setup and User Setup.

Related Documentation and Resources

The following documents provide additional information on installing and implementing other Oracle E-Business Suite applications.

Installing Oracle Applications, Release 11i

This manual documents the Rapid Install installation process.

Oracle Applications Concepts

This guide provides an introduction to the concepts, features, technology stack, architecture, and terminology for Oracle Applications Release 11*i*.

Oracle Applications Flexfield Guide

This guide contains information about using Oracle Flexfield features. It also offers flexfield implementation suggestions.

Oracle Applications Product Update Notes, Release 11i

This document contains information about new product features and functions for various Oracle applications.

Oracle Applications System Administrator's Guide

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

Oracle Applications User's Guide

This guide explains how to customize lists of values (LOVs) in the system, enter data, and introduces other basic features of the GUI available with Oracle Applications Release 11*i*.

Additional Product-Related Documentation

Implementing CRM Applications

This document provides instructions for completing installation of Oracle Customer Relationship Management (CRM) products.

Implementing Oracle HRMS

This document provides the information necessary to implement Oracle HRMS.

Oracle CRM Foundation Implementation Guide

This guide describes set up and configuration tasks for all the foundation components.

Oracle CRM Foundation Technical Reference Manual

This manual contains table and view descriptions for all the Oracle CRM foundation components.

Support

From on-site support to central support, our team of experienced professionals provides the help and information you need to keep Oracle Fulfillment Services working for you. This team includes your Technical Representative, Account Manager, and Oracle's large staff of consultants and support specialists with expertise in your business area, managing an Oracle8*i* server, and your hardware and software environment.

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 *MetaLin*k, you can obtain information and advice from Top Tech Documents and forums, download patches, download the latest documentation, look at bug details, and create or update TARs. To use MetaLink, register at (http://metalink.oracle.com).

Alerts

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

1

Fulfillment Services Overview

1.1 Introduction

Fulfillment is defined as an automated way to send information to customers. It provides the ability to immediately satisfy a customer's request for information, literature, and other correspondence. For example, Customer Service Representatives handle a variety of requests ranging from product and service inquiries, pricing questions, billing inquiries, and general customer case issues. Many of these requests will result in dissemination of literature, collateral, forms of application, letters or correspondence to the customer. Oracle Fulfillment Services provides the ability for call center administrators, mobile field representatives, marketing managers, customer care representatives, and other service agents to respond to different customer needs quickly and easily using email and a physical channel through Oracle Order Capture.

1.2 Key Features

- Provides automated delivery of information to customers via email.

- Supports scheduling, prioritizing, cancelling, re-scheduling of fulfillment requests.

- Ability to recreate and resend preselected fulfillment that was sent in the past.

- Character set support for multiple languages.

- Online content, query creation and management. This powerful feature allows a user to create templates with merge fields and preview the created content.

- Scalable, fault tolerant architecture that balances load among multiple fulfillment and SMTP servers.

- Optionally tracks when email messages are opened by the end user.

- Collects statistics on malformed messages.

- Ability to mail multiple documents. Ability to send multi-part email messages.

- Optionally updates customer information stored in Interaction History.

- Supports customized email content based on queries of the organization's TCA data.

- Provides a convenient interface for the managing and monitoring fulfillment requests.

- Supports standard unsubscribe and suppression functionality.

1.3 Fulfillment Users

Customer service representatives or agents handle a variety of requests ranging from product and service inquiries, pricing questions, billing inquiries, and general customer care issues. Many of these requests will result in some dissemination of literature, collateral, forms of application, or correspondence to the customer.

By using Fulfillment Services, sales and marketing representatives, interaction center agents, and service or support personal can focus on each customer's unique fulfillment requirements on a one-to-one basis without spending time managing fulfillment output.

An agent using fulfillment can send out information to prospective customers that include product announcements, newsletters, lead generation and qualification campaigns, and customer service requests. Fulfillment can also be used as the mechanism to send out marketing information through marketing campaigns, like email blitzes.

1.4 Fulfillment Servers

Fulfillment servers are used to monitor fulfillment requests. Servers are created with a name and description and include a shut down time.

A fulfillment server administrator (or someone who has been designated as the server administrator) has the ability to create a new server, update an existing server, or restore server attributes for an existing server. Scalability may be achieved by adding additional equipment.

1.5 Content

Content is a combination of any or all of the following:

- Text

- Graphics

- Merge fields for customized email

- Attachments

1.6 Queries

A query is a SQL (Structured Query Language) statement which collects specific kinds of data from the database when fulfilling a request. From the query subtab, you can create, update, or restore queries.

Queries are used for generating and populating data in the content automatically, through a merge facility. The available fields from the selected query are listed on the Template page.

The first step in creating a query involves identifying the sources needed for the query. The query provides merge fields for customizing an email content to its intended recipient.

A single query may be associated with more than one template providing that the merge field names match the database column names and there is a one-to-one correspondence between the number of merge fields and the number of columns queried in the SQL statement.

1.7 Key Concepts

Fulfillment Server Group

A Fulfillment Server Group is a group of server instances which process fulfillment requests. Users and roles are assigned to Server Groups for processing of requests. A Server Group processes the requests of its assigned users and roles before processing other queued requests.

Fulfillment Server

A Fulfillment Server is an instance of the request processing software. This is a standalone java server that's responsible for merging dynamic content into the templates to create customized email message for each recipient.

Mail Profiles

Mail profiles determine many aspects of the outbound email, such as sender's name, sender's domain, reply address, non-delivery address and whether statistics are collected.

Email Server

These are the SMTP implementations supporting the popular email servers such as sendmail, LSMTP, and qmail. These are responsible for sending the emails generated by the fulfillment servers to the intended recipients.

Templates

Templates are the uncustomized emails which are constructed, generally, as a mixture of text and graphics in HTML format. A template is merged with an associated query during request processing to creaste customized emails.

Query

A query is a SQL statement which generates selected data from a database. A query serves two purposes. The first is to determine which records meet the defined criteria. The second is to determine which fields of those records are returned. The returned data is merged with a template to create a customized email for each recipient.

1.8 Key Benefits

As a key application of the Oracle E-Business Suite, Oracle Fulfillment Services offers the following benefits:

- Automate processes – By providing centralized processes and approval management, Oracle Fulfillment Services enables an organization to focus more on marketing and less on logistics.

- Increase throughput – Oracle Fulfillment Services increases personal productivity while facilitating team collaboration and information sharing. Marketers can plan and execute campaigns in an accelerated time frame to gain a first mover advantage.

- Become a profit center – Because campaigns and offers are tracked across the Oracle E-Business Suite, Oracle Fulfillment Services enables marketers to pinpoint the revenue generated by each marketing effort.

- Maximize ROI – Since costs and revenue can be tracked on a real-time basis, marketers can tweak or even stop a campaign in midcourse to maximize the marketing ROI.

2

Technology Requirements and Dependencies

The implementation of Oracle Fulfillment Services requires certain technologies to be present. This chapter lists those technology requirements, and required and optional dependencies.

> **Note:** For Technological Requirements that overlap with Technological Requirements specified in the *Oracle Applications Installation Guide*, the *Oracle Applications Installation Guide* shall take precedence.

2.1 Technology Requirements

The following table lists the technology requirements for Oracle Fulfillment Services.

Technology
Oracle 8 Enterprise Edition Release, version 8.1.7.2
Apache, version 1.3.9
Java Developer Kit Server Side, version 1.2
JInitiator, version 1.1.8.13
BI Beans, version 1.6.0.36
Oracle XML parser for Java, version 2

Technology
MS Internet Explorer, version 5.5 or later
This is the recommended browser for all HTML-based applications.

2.2 Required Dependencies

The following CRM foundation modules must be implemented in full. Any dependent applications must be set up in full if you have purchased a license for that application. If you have not purchased a license, then you need only to set the application up to the extent allowed by the shared license which comes free of charge with Oracle Fulfillment Services.

Application or Module
Human Resources (HRMS)

2.3 Optional Dependencies

Oracle Fulfillment Services will provide the Deliverables subtab on the Content tab if Oracle Marketing Online is implemented. This gives the Fulfillment Services user access to content created by users of Marketing Online and the ability to create content that may be available to the users of Marketing Online.

Oracle Fulfillment Services also provides the List, Import, Discoverer and Search subtabs of Oracle Marketing Online's Audience tab on its Audience tab. A Fulfillment Services user may have access to lists created in Marketing Online and the ability to create, search and import lists directly from Fulfillment Services.

3

Implementation Overview

3.1 Implementation Description

There are a number of processes which must be completed to implement Oracle Fulfillment Services. This chapter gives a brief description of those processes. The step by step procedures are detailed in the next chapter, Implementation Steps.

3.1.1 Profile Options

The procedure for setting up and changing profile options is the same for all Oracle Applications. For a detailed description of the procedures, refer to the *Oracle Applications System Administrator's Guide*.

Profile options may be set at four different levels:

Site. The site level setting affects the entire Oracle E-Business Suite.

Application. When a profile option is set this level it overrides the site level setting for the particular application.

Responsibility. The responsibility level setting affects users of a given responsibility. When a profile option is set at this level it overrides the application level setting for users of the particular responsibility.

User. Settings at the user level affect the individual user only. When a profile option is set at this level it overrides the responsibility level setting for an individual user.

> **Note:** Profile options belonging to Oracle Fulfillment Services have the prefix of AMF. During implementation, profile options relating to dependencies may be set as well.

3.1.2 Lookups

There are three types of Lookups:

System. System Lookups may not be modified or deleted, and may not have additional values added.

Extensible. Extensible Lookups may have additional values added to the list. Seeded extensible Lookups may not be deleted.

User. User Lookups are completely modifiable. They may be modified and/or added to. Seeded user Lookups, if any, may be modified or deleted.

> **Note:** All levels of Lookups may have their visible value, the text displayed to the user, modified.

3.1.3 Administration Options

There are a number of administration options that are associated with the individual tabs in Oracle Fulfillment Services. There are also administration options which affect multiple tabs. Those administration options are collected under the Basic Implementation Chapter.

Many administration options choices are used, throughout the application, to populate drop-down menu selections with a list of values (LOVs).

3.2 Implementation Sequence

Summary of Steps needed to Implement Oracle Fulfillment Services.

Step	Task	Required
4.2	Set System Profile Options	Yes
4.3	Enter Lookup Values	Yes
4.4	Set up the Fulfillment Administrator	Yes
4.5	Create Fulfillment Server Groups	Yes
4.6	Configure Fulfillment Servers	Yes
4.7	Start the Fulfillment Server	Yes
4.8	Configure Email Servers	Yes
4.9	Create Mail Profiles	Yes

Step	Task	Required
4.10	Create Queries	Yes
4.11	Create Templates	Optional
4.12	Create Attachments	Optional
5.1	Creating Categories	Optional
5.2	Creating Custom Setups	Optional
5.3	Deduplication Rules for List Import	Optional
6.2	Create the Employee	Yes
6.3	Create the User	Yes
6.4	Enabling the Application Switchboard	Optional

4

Implementation Steps

This chapter covers the set up of Oracle Fulfillment Services. Implementing Oracle Fulfillment Services involving the creation of fulfillment servers, email servers, assigning sever groups and the assignment of users to server groups.

4.1 Implementation Task Sequence

The following table describes the order and process of implementing Fulfillment Services.

Table 4–1   Task Sequence for Implementing Fulfillment Services

Step	Required	Description
4.2 Set System Profile Options	Yes	Set the profile options which are required for your implementation of Oracle Fulfillment Services. These options become the default settings for the Fulfillment Server.
4.3 Enter Lookup Values	Yes	Lookup values provide the lists displayed when the user clicks the lookup icon next to a field.
4.4 Set up the Fulfillment Administrator	Yes	This process creates the Fulfillment Administrator. The Fulfillment Administrator is responsible for configuring Fulfillment Services. The Fulfillment Administrator must have a responsibility of Oracle Fulfillment Services Super User assigned to him.
4.5 Create Fulfillment Server Groups	Yes	Each Fulfillment Server must be assigned to only one Fulfillment Server Group. The application is designed to allow the creation of a Server Group, the creation of a Fulfillment Server and the addition of the Server to the Server Group in a single process.

Table 4–1   Task Sequence for Implementing Fulfillment Services

Step	Required	Description
4.6 Configure Fulfillment Servers	Yes	If not accomplished in the previous step, each Fulfillment Server must be configured appropriately.
4.7 Start the Fulfillment Server	Yes	Each Fulfillment Server must started.
4.8 Configure Email Servers	Yes	Configure each email server
4.9 Create Mail Profiles	Yes	Mail profiles are used to configure email components such as sender's name, domain name, and various reply addresses.
4.10 Create Queries	Yes	Queries are required in order customize email content to its intended recipient.
4.11 Create Templates	Optional	Templates are the body of the email being sent. The template may consist of text, graphics, information which is related to the recipient and merged from a query, or any combination thereof.
4.12 Create Attachments	Optional	Attachments to a Template are file which are sent as an attachment to the individual email. Attachments may be files found on the server, the local desktop, or from another Oracle application, such as a Deliverable created in Oracle Marketing Online.

4.2 Set System Profile Options

These profile options configure Fulfillment Server and adapt it to your system.

Prerequisites

None

Navigation

Log into the Forms instance and select System Administrator Responsibility.
Navigate to Functions > Profile > System.

Steps

1. Enter a profile name in the Profile Field and click Find.

2. Enter the appropriate value in the column corresponding to the level indicated.

3. Save your work.

Table 4–2   Profile Options and Settings

Option	Required	Level	Setting	Effect/Limitation/Default Value
AMF: Server Heartbeat	Yes	Site	Numeric Value in Seconds	This is time in seconds after which the server performs periodic updates to the database and reads new property values if any. Optimal value is 600 seconds. This should not be set to any value under 300 as it will adversely affect the performance and error recovery. Any value greater than 900 will make the server slow to respond to changes.
AMF: Number of Query Processors	Yes	Site	Numeric Value	This indicates the number of parallel database sessions available to process fulfillment queries. A minimum of 3 is required for fault tolerance, 5 is optimal. The higher the value the higher the rate at which the queries are executed. However this is non-linear and will adversely affect other database transactions. A value of 10 is the recommended maximum. There should be at least 5 fulfillment servers available in the system to utilize this value.
AMF: No Customize Chunk	Yes	Site	Numeric Value	This is the number of messages allocated to each fulfillment server, if there are no customizations in the message. The optimal value is 5000. Lowering this value will increase parallelization for the request, however this also increases document loads from the servers and the server processing will not be efficient. This value should not be set lower than 2000. A Higher value lowers the parallelization and the speed at which this request is handled. This value should not be set higher than 10000.

Table 4–2   Profile Options and Settings

Option	Required	Level	Setting	Effect/Limitation/Default Value
AMF: Customize Chunk	Yes	Site	Numeric Value	This is the number of messages allocated to each fulfillment server, if there are customizations in the message. The optimal value is 1000. Lowering this value will increase the parallelization for the request, however this will also increase document loads from the servers and the server processing will not be efficient. This value should not be lower than 500. The higher the value, the lower the parallelization and the speed at which the request is handled. This value should not be set higher than 2000.
AMF: Insert Row Size	Yes	Site	Numeric Value	This value indicates the maximum number of rows that can be inserted into the data tables in any transaction. A value of 100000 is optimal. A higher number requires more resources, such as rollback segments, will be needed to manage the transaction. The lower the number, the longer it will take to process queries and insertions.
AMF: Encryption Key	Yes	Site	A text value between 5 and 20 alpha numeric characters.	If this value is changed, it will not be possible to decrypt the data that was sent out earlier with a different key.
AMF: Default Email User	Optional	Site	User Defined	Default username used in sending email messages.
AMF: Default Email Password	Optional Required if AMF: Default Email User is specified	Site		Password of the default email username.

Table 4–2   Profile Options and Settings

Option	Required	Level	Setting	Effect/Limitation/Default Value
AMF: Default Mail Profile	Yes	User	Select from available mail profiles	This is the default mail profile used whenever the user sends an email. However, it is recommended that mail profiles are appropriate for every request.
AMF: Order Type	Yes	Site	Order type from LOV supplied by Order Management	Order type used for Order Management when collateral is requested.
AMF: Base URL	Yes	Site	Base URL for email recipients to click and contact the sender via their home page	This indicates the location of the webserver which will host the Oracle E-Business suite application. It is needed to make sure the hyperlinks sent to the customer are properly directed back to the sending application.
AMF: Is Admin User	Yes	User	Yes/No	Profile is used to determine if an AMF user is also an administrator.
JTF Home Page File Name	Yes	Appl	jtfhomepage.jsp	This sets the default home page of all fulfillment users to jtfhomepage.jsp which is uniform across many applications and can be configured as required. **This is not an AMF profile, but the jtfhomepage.jsp value must be entered for the Oracle Fulfillment Services application.
AMF: Default Unsubscribe Template	Yes	Site	50	This is the seeded content item ID from Content Manager that will be appended to emails to provide a link to the Contact Preferences page. This should not be changed.
OSO: Minimum search string length	Optional	Site or User	User Defined	The default setting is 0. This profile determines the number of characters that must be entered before performing a search.

4.3 Enter Lookup Values

Verify and create lookups for Fulfillment Services.

Steps

1. Log into Forms and Select Oracle Fulfillment Services Administrator responsibility.

2. Navigate to Functions > Setups > Lookups.

3. Use View > Find to locate the individual keys.

> **Note:** System type keys may not be changed, deleted or added to. Extensible type keys may have their visible values changed. User type keys may have additional keys added as well as their seeded values changed.

See the table below for Lookups and their types, values, and meanings.

Key	Type	Values	Meanings
AMF_ACCESS_TYPE	System	Group	Group
		User	User

Key	Type	Values	Meanings
AMF_CHARSET_TYPE	Extensible	Arabic (ISO)	Arabic (ISO)
		Arabic (Windows)	Arabic (Windows)
		East European (ISO)	East European (ISO)
		East European (Windows)	East European (Windows)
		Greek (ISO)	Greek (ISO)
		Greek (Windows)	Greek (Windows)
		Hebrew (ISO)	Hebrew (ISO)
		Hebrew (Windows)	Hebrew (Windows)
		Japanese (EUC)	Japanese (EUC)
		Japanese (Windows)	Japanese (Windows)
		Korean (EUC)	Korean (EUC)
		Korean (Windows)	Korean (Windows)
		Russian (ISO)	Russian (ISO)
		Russian (Windows)	Russian (Windows)
		Simplified Chinese (GB2312)	Simplified Chinese (GB2312)
		Simplified Chinese (Windows)	Simplified Chinese (Windows)
		Thai (Windows/ISO)	Thai (Windows/ISO)
		Traditional Chinese (Big5)	Traditional Chinese (Big5)
		Traditional Chinese (EUC)	Traditional Chinese (EUC)
		Traditional Chinese (Windows)	Traditional Chinese (Windows)
		Turkish (ISO)	Turkish (ISO)
		Turkish (Windows)	Turkish (Windows)
		Unicode (UTF-8)	Unicode (UTF-8)
		West European (ISO)	West European (ISO)
		West European (Windows)	West European (Windows)

Key	Type	Values	Meanings
AMF_CREATE_ EXPIRATION_STATUS	System	A	Active
		I	Inactive
AMF_EMAIL_SERVER_ TYPE	System	IMAP	IMAP (not supported in this release)
		SMTP	SMTP
AMF_EMAIL_STATUS	System	Bounced	Bounced
		Malformed	Malformed
		Opened	Opened
		Total	Total
		Unopened	Unopened
		Unsubscribed	Unsubscribed
AMF_EXPIRATION_ STATUS	System	A	Active
		E	Expired
		I	Inactive
AMF_PLATFORM	System	LX	Linux
		NT	Windows NT
		UX	Unix
AMF_PROCESS_STATUS	System	Deferred	Deferred
		Failure	Failure
		In Progress	In Progress
		Partial Success	Partial Success
		Success	Success
AMF_TEMP_ATTCH_TYPE	System	Local	Local
AMF_TEMP_COMP_TYPE	System	AMF_Email_ Deliverable	Destined for future use.
AMF_RT_STATUS	System	Idle	Idle
		Running	Running
		Shutdown	Shutdown
		Startup	Startup

4.4 Set up the Fulfillment Administrator

Create a Fulfillment User with the Oracle Fulfillment Services Administrator (code 23674) as the default responsibility and Oracle Fulfillment Services (code 882) as the default application. Also set the profile option, AMF: Admin User to yes. See Chapter 6, User Setup, for additional information.

4.5 Create Fulfillment Server Groups

Server Groups are composed of Server Instances that form a group. You can create a Server Group and the Server Instances at the same time or create the group first and then add Server Instances.

> **Note:** when configuring the following servers, Fulfillment and Email, select Active for status to make them available for use. Note that selecting Active or Inactive will have no effect on physical servers.

Prerequisites

None

Navigation

Server > Server Groups > Create

Steps

1. Enter a Name for the Server Group.

2. Select a Status of Active.

3. Enter a Priority. Priority levels run from 1 to 100 from lowest to highest priority. Requests from users assigned to a server of priority 10 will be processed before requests from users assigned to a server of priority 1. The priority in this case, does not rank the server against each other. It determines which requests will be processed in which order.

4. Enter a Description.

5. Click Continue to create the Server Group and add Server Instances to the Server Group or click Finish to create the Server Group so that Server Instances may be added later.

6. Clicking Continue will display the Server Group Details page where Server Instances may be created and added to the Server group. Users or Roles may be added to the User Group Mapping as well.

7. Click Create Server Instance to enter information for the Server Instance.

8. Enter an Instance Name for the Server Instance.

9. The Group Name of the Server Instance will be completed for you.

10. Select a Status of Active or Inactive.

11. Enter either a DNS Name or an IP Address for the server instance. If both are entered the DNS Name will take precedence.

12. Click Create.

13. Repeat Steps 7 through 12 to add additional Server Instances.

14. To add User Group Mappings:

    a. Select User or Role from the Role column. Selecting a User will add a User to the Server Group. Selecting a Role will assign all users of that role to a Server Group.

    b. Click the lookup icon next to the Name column to display a list of Users or Roles from which to choose.

15. Click Finish to complete the creation of a Server Group.

4.6 Configure Fulfillment Servers

Server Instances must be attached to a Server Group. Use this procedure only if a Server Group has been created and you wish to add Server Instances to it.

Prerequisites

An existing Server Group.

Navigation

Content > Server Instances > Create

Steps

1. Enter an Instance Name for the Server Instance.

2. Enter the name of the Server Group or click the lookup icon to display a list of available Server Groups. Select a Server Group.

3. Select a Status of Active or Inactive.

4. Enter either a DNS Name or an IP Address. If both are entered the DNS Name takes precedence.

5. Enter Properties as follows. When a value is scalable, a basis for the value supplied is given.

   a. Enable Database logging. Y enables the server to log error or information messages into the database. These may be viewed remotely from a JSP. N means the system creates log files containing error or information messages.

   b. Maximum Merge Threads. Not more than 4 for a 266 Mhz Windows NT machine. These are the maximum number of threads in the server used to create the merged mail messages.

   c. Maximum Mailer Threads. This should be set to twice the number of the Maximum Merge Threads. These threads are responsible for mailing the merged mail messages.

   d. Maximum emails sent per hour. Set in thousands per hour with the minimum value being 1000.

   e. Maximum JDBC connections. The optimal setting is 8. This is the maximum allowable number of parallel connections opened per server.

   f. Maximum Processing Threads. The maximum value is 2 per server instance.

   g. Minimum JDBC Connections. One.

6. Click Finish to create the Server Instance and add it to the selected Server Group.

4.7 Start the Fulfillment Server

4.7.1 Windows NT Setup

Steps

1. Download and install JDK 1.1.8 or JDK 1.2

2. Create a directory FMS

3. Create a directory FMS\lib

4. Create a directory FMS\log

5. FTP in binary mode the following zip/jar files into FMS\lib directory, from the APPL_TOP/java/ where the Oracle Applications is installed. Copy the apps.zip after the Oracle Fulfillment Services patch is installed.

   - sax2.zip

   - xmlparserv2.zip

   - jdbc111.zip

   - apps.zip

6. Create a bat file to set the environment variables in the FMS directory, call it fmsenv.bat. The following need to be set as follows,

```
set CLASSPATH=.
set JDK_HOME=<Directory where JDK is installed eg. E:\jdk1.1.8>
set PATH=%JDK_HOME%\bin
set CLASSPATH=%CLASSPATH%;lib\sax2.zip
set CLASSPATH=%CLASSPATH%;lib\xmlparserv2.zip
set CLASSPATH=%CLASSPATH%;lib\jdbc111.zip
set CLASSPATH=%CLASSPATH%;lib\apps.zip
set CLASSPATH=%CLASSPATH%;%JDK_HOME%\classes
set CLASSPATH=%CLASSPATH%;%JDK_HOME%\lib
set CLASSPATH=%CLASSPATH%;%JDK_HOME%\lib\classes.zip
set CLASSPATH=%CLASSPATH%;%JDK_HOME%\lib\classes.jar
set CLASSPATH=%CLASSPATH%;%JDK_HOME%\lib\rt.jar
set CLASSPATH=%CLASSPATH%;%JDK_HOME%\lib\i18n.jar
```

7. Create a bat file to run the fulfillment server in the FMS directory, call it runfms.bat. The following need to be set as follows. All the text after "java" should be on one continuous line.

```
call fmsenv.bat
java -mx128m -DSERVER_UP_TIME=<Server up time in seconds eg. 172800>
-DLOG_LOCATION=<Full path to the directory where you want the log
messages eg. E:/FMS/log> -DSERVER_INSTANCE_ID=<Server Instance Id eg.
10060> -Dframework.Logging.system.filename=Sys
-Dservice.Logging.common.filename=Apps -DJTFDBCFILE=<Full path to the
dbc file e.g E:/FMS/lib/crmimp06_mapqar8.dbc> -classpath %CLASSPATH%
oracle.apps.amf.servercore.ServerCore
```

It is recommended that the DSERVER UP TIME be set to a minimum of 2 days (172800 seconds) and not exceed 5 days (432000 seconds).

Run the fmsenv.bat file to restart the fulfillment server.

4.7.2 Unix Setup (recommended)

Steps

1. Create a directory FMS

2. Create a directory FMS/lib

3. Create a directory FMS/log

4. Make sure the write permissions are set correctly enabling fulfillment server to create additional files & directories.

5. Set your environment variables by running the relevant script.

6. Capture the PATH and CLASSPATH values by

    ```
    echo $PATH
    echo $CLASSPATH
    ```

    The PATH variable must have the location of a JDK/Bin install.

7. Create a bourne shell script runfms.sh as below and set the PATH and CLASSPATH obtained above. All the text after "java -mx128m" should be one continuous line.

    ```
    #!/bin/sh

    CLASSPATH="<CLASSPATH value captured above>" e.g.
    #CLASSPATH="/oracle/apache/jsdk/JSDK2.0/lib/jsdk.jar:/afrz/crmmkt/code/m
    apdev01/java/jdbc12.zip:/afrz/crmmkt/code/mapdev01/java/apps.zip:/afrz/c
    rmmkt/code/mapdev01/java/sax2.zip:/afrz/crmmkt/code/mapdev01/java/xmlpar
    serv2.zip"

    PATH="<PATH value captured above>" e.g.
    #PATH="$PATH:/local/java/jdk_1.2.2_05a_prod/bin"

    export CLASSPATH
    export PATH

    java  -mx128m -DSERVER_UP_TIME=<Server up time in seconds eg. 432000>
    -DLOG_LOCATION=<Full path to the directory where you want the log
    messages eg. E:/FMS/log> -DSERVER_INSTANCE_ID=<Server Instance Id eg.
    10060> -Dframework.Logging.system.filename=Sys
    -Dservice.Logging.common.filename=Apps -DJTFDBCFILE=<Full path to the
    dbc file e.g E:/FMS/lib/crmimp06_mapqar8.dbc>
    oracle.apps.amf.servercore.ServerCore
    ```

8. Create a cron job to run this script at regular intervals:

```
crontab -e to open a cron job
```

Please enter the following to run this script every hour.

```
0 * * * *  <FULLPATH to runfms.sh>/runfms.sh
```

4.8 Configure Email Servers

The physical email servers that will be used to send outbound emails must be configured under the Email Servers subtab.

Prerequisites

None

Navigation

Server > Email Servers > Create Email Server

Steps

1. Enter the Name of the Email Server.

2. Select SMTP as the Type of server.

3. Select a Status of Active or Inactive.

4. Enter a DNS Name or an IP Address. If both are entered, the DNS Name takes precedence.

5. Enter the Port number for the server. The default is 25.

6. Select a Platform for the server: Linux, Unix, or Windows NT.

7. Select the Is Secure checkbox if the server encrypts outgoing transmissions.

8. Enter a Description.

9. Click Apply to create the server.

4.9 Create Mail Profiles

Mail Profiles determine how mail is return addressed, which domain it is sent from and other parameters. A Mail Profile will be selected when a request is made.

Prerequisites

None

Navigation

Server > Mail Profiles > Create Mail Profile

Steps

1. Enter a Name for the Profile.

2. Select a Status of Active or Inactive.

3. Enter a Description.

4. Click Apply to create the Mail Profile and return to the Mail Profiles summary page. Click Continue to add Profile Properties.

5. Enter values for the following Properties. To remove the value, clear the field.

    a. Mail From Domain. Enter the domain where the email is sent from.

    b. Bounce Back Address. Enter the address, at the Mail From Domain, where bounce backs should be sent.

    c. Reply To Address. Enter the address, at the Mail From Domain, where recipient replies should be addressed.

    d. Send Multipart Emails. Enter Y to have email sent in Text and HTML formats so the recipients mail client can display the text version if HTML is not available. If set to N, only the HTML version will be sent.

    e. Mail From User. Enter the address, at the Main From Domain, which should appear in the From line of the email.

    f. Enable Statistics Collection. Enter Y to have statistics collection. In the current release only Open statistics are collected from HTML emails. Statistics are not collected from text only email.

    g. Include Unsubscribe Template. Enter Y to append the standard unsubscribe template with the unsubscribe URL to every email message. Only messages sent to lists and parties will have this link appended at the end.

4.10 Create Queries

Queries are created on the Content tab and provide the data to customize email to its recipient.

Prerequisites

None

Navigation

Content > Query > Create

Steps

1. Enter a Name for the query.

2. Enter a Description for the query.

3. Enter the SQL statement to produce the desired records from the database. A SQL statement may be designed to retrieve records from a list created in Discoverer.

   > **Note:** If logging interactions into Oracle Interaction History, add the following to the query: 'P' Customer_Type, party_id customer_ id. There should not be any colons (:) in the SQL statement except for the Bind Variable. The select columns should not exceed 50.

4. Click Create to save your work.

Query Limitations

The Email Address Column must be named: emailaddress

The Fax Address Column must be named: faxaddress

The BLOB and CLOB columns must <u>not</u> be selected in the query.

There must be no spaces in the column aliases. For example, "Customer Name".

4.11 Create Templates

See the *Oracle Fulfillment Services Users Guide* for information on creating templates.

4.12 Create Attachments

See the *Oracle Fulfillment Services Users Guide* for information on creating and attaching attachments.

5

Administration Setup

This chapter details creating Custom Setups for Deliverables and Audience if Marketing Online is implemented as an optional dependency. While Custom Setups for Deliverables may have already been setup, these are the steps to create additional Custom Setups which may be suitable for email deliverables.

> **Note:** Deliverables and Audience appear only if Marketing Online has been implemented.

Step	Required	Description
	Optional	Create Categories for Deliverables.
	Optional	Create setups for Deliverables.
	Optional	Create Deduplication Rules for importing list entries.

5.1 Creating Categories

Use

Categories are used to group like objects. Most of the Categories for deliverables have been seeded. Use these steps to create additional categories for deliverables.

Deliverables

Categories are used by deliverables to group them together. When creating a deliverable, a category is required. Examples of deliverable categories are:

Collateral, Creative, or email. Additionally you may create subcategories to further define a deliverable.

Prerequisites

None

Navigation

Marketing Online > Administration > Marketing > Setup > Categories.

Steps

1. Click Create.

2. Enter a Category Name.

3. Select a Parent Category if desired.

4. Select the Enabled checkbox to make the Category available.

5. Select Deliverable from the Created For drop-down menu.

6. Enter a Description.

7. In the case of deliverables, make sure the parent–child relationship is captured correctly.

8. Click Create.

5.2 Creating Custom Setups

Use

A Custom Setup reflects how an organization will use a Deliverable. A custom setup determines the Activity Type and Activity associated with a Deliverable and which items appear on the Side Navigation Menu when a Deliverable is created or edited.

Side Navigation Menu

This is the vertical menu which appears on the left hand side of the page, once an object is created or when it is edited.

Menu Items

 These are the components available for Deliverables:

- Main

- Attachments

- Budget

- Costs and Revenues

- Metrics

- Email Content

- Deliverable Kit

- Inventory Options

- Tasks

- Notes

- Team

Each of the menu items refer to a different page. Menu items are the functional areas within the application where data can be created or object details viewed. While some of the menu items have functional implications, others are used for information purposes only. The Main item is displayed when an object is first accessed.

Component Groups

Each of the menu items are logically grouped into various sections based on functionality. Component Groups for Deliverables include Planning and Collaboration.

Navigation

Marketing Online > Administration > Marketing > Setup > Custom Setup

Steps

1. Click Create.

2. Associate the Custom Setup with a Deliverable marketing object.

3. Select an Activity Type for the Deliverable. For email deliverables, select an Activity Type of Email.

4. Select an Activity.

5. Mark Active – Only Active custom setups will show up at object creation.

6. Set Suffix - The suffix set here is reflected when an object is created. The suffix can be alpha, numeric or a combination. The maximum number of characters in a suffix is three. This field is optional.

7. Select Menu Items.

   The option to select menu items appears when a custom setup is created.

   The combination of menu items show up based on the Object, Activity Type, and Activity combination.

   a. Select a Component Group from those listed above.

   b. Select a Display Sequence. This dictates the order in which the menu items are displayed within a component group.

   c. Select Components. These are all the menu items available to be selected. These are seeded within the application. Menu items not shown are not available. In order to be used for Fulfillment Services, the Email Content component must be selected.

   d. Available Attributes. Components may be selected or deselected on the basis of these checkboxes. Deselected menu items do not appear on the object side panel menu.

   e. Mandatory. Once components are made mandatory, those components cannot be disabled. The only recourse would be to inactivate the custom setup and create a new one with modified components and criteria.

   f. Show in Reports. This checkbox will decide the attributes shown in the portals and for locked objects.

   g. Approvals. Approvals can be selected or deselected for Theme and Budget. Objects using custom setup with 'Theme' and 'Budget' disabled do not go through approval process. Theme and Budget approval can be selected or deselected independent of each other. Please refer to Creating Approval Rules for more information on the approval process.

Custom setups are selected from the respective create object pages. While some custom setups are seeded, additional setups may be created or existing setups may be modified to meet the organization's Business Rules.

5.3 Deduplication Rules for List Import

   a. Log into Marketing Online.

b. Navigate to Administration > Marketing > Audience > Deduplication Rules.

c. Enter a Rule Name, Description and select a Type from: Import Consumers, Import Organizations or List. The Type determines when the rules will be applied.

d. Click Update.

e. Click the link of the rule just created.

f. Select a table column for this rule to check for duplicates.

g. Click Update. Select additional columns if required.

h. Click the Deduplication Rules link to return to the Rules List.

6

User Setup

Users of the Oracle Fulfillment Services are created using the following steps. As it is likely that other Oracle applications have been implemented and users already created, please check carefully for the existence of a user or an employee before setting up a new user.

> **Note:** You must perform these steps in this order shown.

Steps

Step	Required	Description
6.1 HRMS Navigation	N/A	This section describes the navigation paths used to set up employees in the next step.
6.2 Create the Employee	Yes	Users are associated with employees and therefore must be created first.
6.3 Create the User	Yes	These are the steps to create a user of Fulfillment Services.
6.4 Enabling Default Responsibilities	Yes	Users of Fulfillment Services are likely to have access to multiple Oracle applications. This section contains steps to set a default responsibility for a user.

6.1 HRMS Navigation

The responsibilities and navigation paths are different for the Oracle HRMS and Shared Oracle HRMS. See below for Responsibilities and base Navigation paths for each.

This section describes the creation of Users for Fulfillment Services.

6.1.1 With Full Oracle HRMS

Responsibility: HRMS Manager

Navigation: People > Enter and Maintain

6.1.2 With Shared Oracle HRMS

Responsibility: CRM Administrator

Navigation: CRM Foundation > Resource Manager > Maintain Employees > Employees

> **Note:** If you have the full installation of Oracle HRMS then you cannot create employees under CRM Foundation > Resource Manager > Maintain Employees > Employees. You will receive an error message indicating that you must use HRMS.

6.2 Create the Employee

A user of Oracle Fulfillment Services must be an employee first in order to be set up as a user. Follow these steps to create a new employee.

Prerequisites

None

Steps

1. Log into forms.

2. Select appropriate HRMS Manager Responsibility.

3. Navigate to People > Enter & Maintain.

4. In the Find Person box, enter a full or partial last name for the employee followed by a "%" and click Find. If the person is found, click OK and close the form. Proceed to section 6.3.

    If the person is not found, continue with the following steps.

5. Enter the following information:

- Last Name and First Name

- Title (courtesy title: Mr., Ms.)

- Gender (will populate based on title, if possible)

- Type = Employee

- Social Security # (will be checked against existing SS#)

- Birth Date

6. Save your work. A confirmation will appear in the lower left corner of the window.

6.3 Create the User

You will create the user based on the employee created in the previous section.

Prerequisites

Create an Employee in HRMS.

Steps

1. Log into Forms under the SysAdmin login.

2. Navigate to Security > User > Define.

3. Click View > Find and enter a full or partial last name followed by a "%". Click Find. If the user is found, skip to Step 7. If the user is not found, continue with the following steps.

4. Create a new user.

5. Assign the employee created in Step 1 to the user.

6. Assign appropriate responsibilities to the user. If Oracle Marketing Online is implemented, the responsibility will be Fulfillment Services Super User. If Oracle Marketing Online is not implemented, the responsibility will be Fulfillment Services Core User. See Step 7 for responsibility codes.

   If Fulfillment Services is not the default application for the user, enter a Fulfillment Services responsibility here, save your work, close the form, and skip to section 6.4.

If Fulfillment Services is the default application for the user or if the user did not exist, enter a Fulfillment Services responsibility here. Save your work and close the form.

7. Set Profile Options:

   a. Navigate to Profile > System.

   b. Enter user name just created.

   c. Search for profile JTF_PRO%.

   d. Set JTF_PROFILE_DEFAULT_APPLICATION equal to 882 in the User column.

   e. Set JTF_PROFILE_DEFAULT_RESPONSIBILITY equal one of the following codes:

      - Oracle Fulfillment Super User, code 23434

      - Oracle Fulfillment Core User, code 23698

      - Oracle Fulfillment Services Administrator, code 23674 (for use in the forms environment only)

      > **Note:** The Oracle Fulfillment Core User has no Oracle Marketing Online responsibilities and will not see the tabs and subtabs (Deliverables and Audience) provided by Marketing Online.

8. Save your work.

9. Import the employee as follows:

   a. Change responsibility to CRM Administrator.

   b. Navigate to Resource Manager > Maintain Resources > Import Resources.

   c. Locate the employee just created. Enter employee's name in the name fields and click Search.

   d. Click Create Resource.

   e. Click OK to accept default values.

   f. Click Save Resource

   g. Click Details.

10. Specify Roles and Groups.

   a. Assign a Role of Sales Representative.

   b. Assign a Group of Sales and Marketing.

6.4 Enabling the Application Switchboard

Performing these steps will enable users to enable the Application Switchboard and allow a user to select a different application after logging into their default application.

Prerequisites

None

Steps

1. Log into the admin console using the 'SYSADMIN' account.

2. Navigate to Settings > Site Preferences > Interapplication Bar > Navigation Group Setup.

3. Enter a Group Name.

4. Enter a Description for the group.

5. Leave Status as Active.

6. Enter a value for the Display Order.

7. Click Update.

8. Click the Details icon to the right of the Group Name or click Navigation Group Details from the Side Navigation Menu.

9. Select the Application for the group.

10. Click Update.

11. This will create an application navigation list across the top of the screen. Click the application name to switch between two or more applications.

A

Acronyms

This appendix provides a list of acronyms used throughout this Guide. For additional information please see the Glossary in Appendix B.

DNC   Do Not Call. A flag in marketing databases and lists indicating people who do not wish to be contacted.

DNS   Domain Name Service

GUI   Graphical User Interface.

HTML   HyperText Markup Language.

HRMS   Human Resources Management System.

IMAP   Internet Mail Access Protocol

IP   Internet Protocol

JSP   Java Server Page.

LOV   The List of Values is a list that appears in various drop-down fields within OMO. These List of Values can be predefined or created from user entered information.

ROI   Return on Investment.

SMTP   Simple Main Transfer Protocol.

SQL   Structured Query Language. Used to query databases.

URL   Universal Resource Locator.

B

Glossary of Terms

This appendix provides a Glossary of Terms used throughout this guide.

Attachment
A file or URL attached to a marketing object.

Audience
The audience tab provides functionality relating to List creation, management and the creation and management of information relation to parties external to the organization.

Bind Variable
A Bind Variable is a placeholder for a value in a SQL query.

Customer
A prior purchaser of products or services.

Deliverable
A unit of marketing information to be given to a Customer or Prospect. Deliverables may be in hard form, e.g., a flyer or printed information, or in soft form, e.g., an electronic brochure or email attachment.

Discoverer
Oracle Discoverer is a data mining tool allowing users to query databases without knowing SQL.

Dserver Uptime

This is the time in seconds in which the server instance should run before being restarted.

Email Server

A SMTP email server is used to deliver email to the Internet.

Field

A unit of data. Data is stored in an array of records and fields. A field on a Page is where data is entered or selected from a LOV.

Fulfillment User

A Fulfillment User is a user which places create email templates or places fulfillment requests for distribution of email through Oracle Fulfillment Services.

Fulfillment Server

A Fulfillment Server is a standalone java server which merges a template with query information to create customized emails. These emails are then sent to the email server.

Home Tab

The Home tab is the first tab the user sees when they log onto Marketing Online. The Home tab contains a number of bins and available reports as well as links in certain bins to recently accessed marketing objects.

A qualified prospect for the sale of products or services. A lead may result from the prospect contacting the organization or by the organization contacting the prospect.

Interaction

A touchpoint with a customer or potential customer. Interactions may be recorded in Oracle Interaction History.

IP Address

An Internet Protocol Address is a numeric value which identifies a device connected to or addressed from the Internet.

Link

A hyperlink to another Page.

Mail Profiles

A collection of information used to construct email, such as sender's name, sender's domain, reply address and whether statistics are collected.

Multi-Part Email

Multi-Part emails are those which contain both text and HTML components. In this way email clients which are capable of reading text only may read the text portion and those email clients which are capable reading HTML may read the HTML portion. Using a Multi-Part email ensures that the email recipient will be able to read the message content regardless of the type of email client.

Note

A note may be attached to almost any marketing object for many different purposes. Notes, once attached, are not deleteable.

Note Type

These are organization-defined types to used to categorize notes.

Page

A HTML page viewed in a browser.

Query

An SQL statement that returns records.

Record

A collection of related Fields. All of the fields in a Record contain data relating to a single item.

Response

Any communication received back from a customer or prospect. Responses may be saved in Oracle Interaction History.

Structured Query Language (SQL)

Sometimes pronounced "Sequel", Structured Query Language is a standard language for querying, or asking questions of, a database.

Subtab

Some tabs have further divisions called subtabs. Subtabs, if any, are displayed horizontally underneath the tabs.

Summary Page

Summary pages, which are a list of marketing objects, appear under many tabs and subtabs. To view a marketing object's details, click the object's name.

Tab

Main divisions within the user interface of Oracle Marketing Online.

Template

An email composed of text, graphics and merge fields used to create emails which are customized to the individual recipient.

C

Fulfillment Services APIs

The APIs for Fulfillment Services provide a number of procedures for general fulfillment actions. These procedures are part of the PL/SQL package, **AMF_ FULFILLMENT_PUB**.

The procedures which make up the Fulfillment Services APIs are:

Create Fulfillment API

This API processes both electronic and physical fulfillment requests. For physical collateral, an order in Order Management is created. For electronic collateral, an email will be sent out. This API also maintains request history.

This API requires the three type declarations and two table types defined below.

Procedure Name

Create_Fulfillment

Current Version

1.0

Parameter Descriptions

Table 6–1   IN Parameters

Parameter	Type	Description
p_api_version	NUMBER	1.0
p_ini_msg_list	VARCHAR2	To initialize messages if any
p_commit	VARCHAR2	To commit or not

Table 6–1 IN Parameters

Parameter	Type	Description
p_order_header_rec	order_header_rec_type	The record which contains all the request information
p_order_line_tbl	order_line_tbl_type	Contains the information of each recipient at order line level with shipment details
p_fulfill_electronic_rec	fulfill_electronic_rec_type	Contains information of electronic fulfillment
p_request_type	VARCHAR2	*P* for physical fulfillment or *E* for electronic fulfillment

Table 6–2 OUT Parameters

Parameter	Type	Description
x_return_status	VARCHAR2	Returns the status of the API
x_msg_count	NUMBER	Returns the count of the messages
x_msg_data	VARCHAR2	Returns the message data
x_order_header_rec	ASO_ORDER_INT.order_header_rec_type	
x_request_history_id	NUMBER	Returns the unique id of the request that is created. This ID can subsequently be used to track the status of the request using the request history page.

Type Declarations

Table 6–3 Order_Header_rec_type Definition

Parameter	Type	Description
cust_party_id	NUMBER	Requestor Party ID
cust_account_id	NUMBER	Requestor Customer Account ID
sold_to_contact_id	NUMBER	Recipient ID
inv_party_id	NUMBER	Invoice to Party ID
inv_party_site_id	NUMBER	Invoiced Party Site ID
ship_party_site_id	NUMBER	Ship to Site ID

Table 6–3   Order_Header_rec_type Definition(Cont.)

Parameter	Type	Description
quote_source_code	VARCHAR2	Source code of the campaign to which collateral is associated
order_type_id	NUMBER	Standard Order Type
employee_id	NUMBER	Telesales Agent ID

Table 6–4   Order_Line_rec_type Definition

Parameter	Type	Description
ship_party_id	NUMBER	Recipient Party ID
ship_party_site_id	NUMBER	Recipient Party Site ID
inventory_item_id	NUMBER	Collateral ID
quantity	NUMBER	Number of Collaterals
ship_method_code	VARCHAR2	Shipment Method
uom_code	VARCHAR2	Unit of Measure
line_category_code	VARCHAR2	Line Category
disposition	VARCHAR2	Disposition
language_code	VARCHAR2	Language Code
content_name	VARCHAR2	Content Name
content_type	VARCHAR2	Content Name
expire	VARCHAR2	Flag to indicate whether the record has expired.

Order_line_tbl_type Definition

TYPE order_line_tbl_type IS TABLE OF order_line_rec_type INDEX BY BINARY_
INTEGER;

Table 6–5   Fulfill_electronic_rec_type Definition

Parameter	Type	Description
template_id	NUMBER	Refers to the template used for the electronic request. Foreign key to the table IBC_Content_items. Each template is associated with a bind query.
p_version_id	NUMBER	Holds the version number of the template. It is Null then take the latest version of the template.
object_type	VARCHAR2	Refers to the JTF objects. Foreign key to the column object_code in the table jtf_objects_b.
object_id	NUMBER	Refers to the JTF object id.
requestor_type	VARCHAR2	Refers to the type of requestor: P for Party and R for Resource.
requestor_id	NUMBER	Refers to the id of the requestor.
server_group	NUMBER	Refers to the server group. Foreign key to the column server_group_id in the table amf_server_groups_b.
schedule_date	DATE:=SYSDATE	Refers to the date when the request is to be processed. If the date is less than the current date then it is substituted to the current date.
media_types	VARCHAR2	Refers to the media where the electronic collateral will be sent. It is E for email, F for fax and P for print. At present, only email is supported
active	VARCHAR2	Flag to indicate whether the request is it to be archived. At present all requests are archived.
log_user_ih	VARCHAR2	Flag to indicate whether to log user interaction history.

Table 6–5   Fulfill_electronic_rec_type Definition (Cont.)

Parameter	Type	Description
request_type	VARCHAR2	Refers to the type of request. The following values are available:
		EXECUTE_PER_BIND_VALUE: a list of party_ids should be provided in p_party_id. The query associated with the template will be executed once per party id.
		MASS_CUSTOM: the query associated with the template will be run using p_bind_values. All merge fields will be resolved from the query results.
		MASS_NO_CUSTOM: the query associated with the template will be run using p_bind_values to get the destinations, but the template has no merge fields to be resolved.
language_code	VARCHAR2	Refers to the language used for the electronic request. Validation is done against FND_LANGUAGES.
profile_id	NUMBER	Refers to the column mail_profile_id in the table amf_mail profiles_b.
order_id	NUMBER	Refers to the order created for the collateral.
collateral_id	NUMBER	Refers to the collateral requested.
subject	VARCHAR2	Refers to the subject of the requested message.
party_id	AMF_REQUEST. number_tbl_type	Refers to the list of party_ids for which the electronic collateral request is to be processed. If this is not Null then the input parameters -_email and p_fax are ignored.
email	AMF_REQUEST. string_tbl_type	Refers to the target email list. If the parameter p_party_id is Null, then email addresses will be used from this parameter.
fax	AMF_REQUEST. string_tbl_type	Refers to the target fax number list.
bind_values	AMF_REQUEST. string_tbl_type	Refers to the bind values associated with the bind query of the template.
email_text	VARCHAR2	Ignored. Refers to the text of the email.
content_name	VARCHAR2	Ignored.

Table 6–5   Fulfill_electronic_rec_type Definition (Cont.)

Parameter	Type	Description
content_type	VARCHAR2	Ignored.
source_code	VARCHAR2	Source code of the marketing object. The default value for this field is Null
source_code_id	NUMBER	Unique identifier of the source code from source_code table. The default value for this field is Null.

AMF_Request.number_tbl_type Definition

Type number_tbl_type is Table of

NUMBER

Index by Binary Integer;

AMF_Request.string_tbl_type Definition

Type string_tbl_Type is Table of

VARCHAR2(240)

Index by Binary Integer;

Reschedule Fulfillment API

This API reschedules the date and time of an electronic request. At this time, only electronic fulfillment requests are supported.

Procedure Name

Reschedule_Fulfillment

Current Version

1.0

Parameter Descriptions

Table 6–6   IN Parameters

Parameter	Type	Description
p_api_version	NUMBER	1.0

Table 6–6   IN Parameters

Parameter	Type	Description
p_ini_msg_list	VARCHAR2	To initialize messages if any
p_commit	VARCHAR2	To commit or not
p_request_id	NUMBER	The request id of an electronic request
p_request_type	VARCHAR2	E for electronic (only type supported at this time)
p_schedule_date	DATE	New date and time when the electronic request should be processed.

Table 6–7   OUT Parameters

Parameter	Type	Description
x_return_status	VARCHAR2	Returns the status of the API
x_msg_count	NUMBER	Returns the count of the messages
x_msg_data	VARCHAR2	Returns the message data

Cancel Fulfillment API

This API cancels the request of an electronic fulfillment.

Procedure Name

Cancel_Fulfillment

Current Version

1.0

Parameter Descriptions

Table 6–8   IN Parameters

Parameter	Type	Description
p_api_version	NUMBER	1.0
p_ini_msg_list	VARCHAR2	To initialize messages if any
p_commit	VARCHAR2	To commit or not

Table 6–8   IN Parameters

Parameter	Type	Description
p_request_id	NUMBER	The request id of an electronic request
p_request_type	VARCHAR2	E for electronic (only type supported at this time)

Table 6–9   OUT Parameters

Parameter	Type	Description
x_return_status	VARCHAR2	Returns the status of the API
x_msg_count	NUMBER	Returns the count of the messages
x_msg_data	VARCHAR2	Returns the message data

Resend Fulfillment API

This API enables the resending of a previously sent email to the requestor. This API only supports electronic fulfillment at this time.

Procedure Name

Resend_on_Request

Current Version

1.0

Parameter Descriptions

Table 6–10   IN Parameters

Parameter	Type	Description
p_api_version	NUMBER	1.0
p_ini_msg_list	VARCHAR2	To initialize messages if any
p_commit	VARCHAR2	To commit or not
p_request_history_id	NUMBER	The request id of an electronic request the user wants to send again, to one or more recipients on the original list.

Table 6–10   IN Parameters

Parameter	Type	Description
p_request_table	Request_tbl_type	This type contains information referring to the recipients receiving the resent email.

Request_tbl_type Definition

TYPE request_tbl_type IS TABLE OF request_rec_type INDEX BY BINARY_
INTEGER;

Table 6–11   OUT Parameters

Parameter	Type	Description
x_return_status	VARCHAR2	Returns the status of the API
x_msg_count	NUMBER	Returns the count of the messages
x_msg_data	VARCHAR2	Returns the message data

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Character Sets and Languages

The following characters sets are supported by Oracle Fulfillment Services. Email and documents in different languages must be encoded in different languages for proper retrieval and display.

Table 6–12   Character Sets

Character Set	Supported Languages
ISO 8859-1	Western European (Albanian, Basque, Breton, Catalan, Danish, Dutch, English, Faeroese, Finnish, French, German, Greenlandic, Icelandic, Irish Gaelic, Italian, Latin, Luxemburgish, Norwegian, Portuguese, Rhaeto-Romanic, Scottish Gaelic, Spanish, and Swedish).
ISO 8859-2	Eastern European (Albanian, Croatian, Czech, English, German, Hungarian, Latin, Polish, Romanian, Slovak, Slovenian, and Serbian).
ISO 8859-3	Southeastern European (Afrikaans, Catalan, Dutch, English, Esperanto, German, Italian, Maltese, Spanish, and Turkish).
ISO 8859-4	Northern European (Danish, English, Estonian, Finnish, German, Greenlandic, Latin, Latvian, Lithuanian, Norwegian, Sami, Slovenian, and Swedish).
ISO 8859-5	Eastern European (Cyrillic-based: Bulgarian, Byelorussian, Macedonian, Russian, Serbian, and Ukrainian).
ISO 8859-6	Arabic
ISO 8859-7	Greek
ISO 8859-8	Hebrew

Table 6–12   Character Sets

Character Set	Supported Languages
ISO 8859-9	Western European (Albanian, Basque, Breton, Catalan, Cornish, Danish, Dutch, English, Finnish, French, Frisian, Galician, German, Greenlandic, Irish Gaelic, Italian, Latin, Luxemburgish, Norwegian, Portuguese, Rhaeto-Romanic, Scottish Gaelic, Spanish, Swedish, and Turkish).
ISO 8859-10	Northern European (Danish, English, Estonian, Faeroese, Finnish, German, Greenlandic, Icelandic, Irish Gaelic, Latin, Lithuanian, Norwegian, Sami, Slovenian, and Swedish).
ISO 8859-15	Western European (Albanian, Basque, Breton, Catalan, Danish, Dutch, English, Estonian, Faeroese, Finnish, French, Frisian, Galician, German, Greenlandic, Icelandic, Irish Gaelic, Italian, Latin, Luxemburgish, Norwegian, Portuguese, Rhaeto-Romanic, Scottish Gaelic, Spanish, and Swedish).
TIS-620	Thai
EUC-KR	Korean
GB2312	Simplified Chinese
BIG5	Traditional Chinese
ISO-2022-JP	Japanese

The following is an alphabetic list of languages supported by the above character sets:

Table 6–13   Supported Languages

Afrikaans	Hebrew
Albanian	Hungarian
Arabic	Icelandic
Basque	Italian
Breton	Japanese
Bulgarian	Korean
Byelorussian	Latin
Catalan	Latvian
Chinese, Simplified	Lithuanian
Chinese, Traditional	Luxemburgish
Cornish	Macedonian
Croatian	Maltese
Czech	Norwegian
Danish	Polish
Dutch	Portuguese
English	Rhaeto-Romanic
Esperanto	Romanian
Estonian	Russian
Faeroese	Sami
Finnish	Serbian
French	Slovak
Frisian	Slovenian
Gaelic, Irish	Spanish
Gaelic, Scottish	Swedish
Galician	Thai
German	Turkish
Greek	Ukrainian
Greenlandic	