


Oracle iSupport


From Customer Call to Resolution
NorCal OAUG Training Day
San Ramon, CA



Agenda

- ❖ Introduction
- ❖ Session Objectives
- ❖ iSupport Components
- ❖ iSupport Integration Points
- ❖ Sample process for online support
- ❖ iSupport Customer Registration

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Agenda (continued)

- ❖ iSupport Home page
 - ❖ Find a Solution
 - ❖ Frequently Used Solutions
 - ❖ Create a Service Request
 - ❖ Call Me
- ❖ Call routing process
- ❖ Customer support team
 - ❖ Universal Work Queue
 - ❖ Field service dispatch

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Introduction

- ❖ FMT Systems Inc.
- ❖ Presenter — Faun deHenry

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Session Objectives

During this session you will learn about:

- ❖ The customer view of iSupport
- ❖ How a customer can create a request for service online
- ❖ How the service request information flows into Oracle Customer Support for resolution by a customer service team

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Session Objectives

This session will not cover:

- ❖ Return Material Authorizations (RMA's)
- ❖ Service request details
- ❖ Technical set up of Oracle iSupport or Customer Support

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iSupport Components

- ❖ Home
- ❖ Accounts
- ❖ Products
- ❖ Support
 - ❖ Call Me
 - ❖ Service Request
 - ❖ Knowledge Management
- ❖ Forum

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iSupport Integration Points

❖ AOL	❖ Install Base and Inventory
❖ CRM Technology Foundation	❖ Support
❖ Workflow	❖ Contracts Suite
❖ Trading Community	❖ Order Management (OM)
❖ Accounts Receivable	❖ Capture (OC) APIs
❖ General Ledger	❖ Web Call-Back
❖ HRMS	❖ Oracle Scripting
❖ CRM Foundation	

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Sample Process

```

    graph TD
      subgraph Customer
        Start([Start]) --> Call[Call Center Representative]
        Call --> ID{Identify Problem}
        ID --> Rep[Service Representative]
      end
      subgraph Service_Rep
        Rep --> Diag[Diagnose Problem]
        Diag --> Res[Resolve Problem]
        Res --> End([End])
      end
      subgraph Support_Rep
        Res --> Escalate{Escalate}
        Escalate --> Support[Support Representative]
        Support --> Res
      end
      subgraph Customer_Rep
        Res --> FollowUp[Follow Up Call]
        FollowUp --> End
      end
  
```

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Sample Process — 2

Process Steps

- 1 Customer goes to your company support page.
- 2 At the iSupport login page, your customer must do one of the following:
 - a. If s/he is already registered, enter a **User ID** and password and click **Go**.
 - b. If s/he is *not* registered, click **Register Here** to begin the registration process.
- 3 After the Home page launches, your customer can do any of the following:
 - a. Search your company's knowledge base for a solution
 - b. Go to the Forum tab to review other customers' posts or to post a message.
 - c. Create a request for service
 - d. Go to the Support tab to use the **Call Me** feature
- 4 If a solution is not found using the knowledge base or Forum, your customer creates a service request. Your customer can also use **Call Me** to get assistance with a problem.
- 5 Oracle iSupport uses automated processing for routing service requests and customer call requests to the appropriate customer service team.
- 6 When a member of the customer service team checks the Universal Work Queue, the customer's request appears in the team's queue.
- 7 A team member takes the service request and follows up with the customer, arranging for:
 - a. RMA
 - b. Repair (off site or field service visit)

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iSupport Customer Registration

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iSupport Customer Registration

ORACLE User Registration

Please select the profile that best describes your situation

If you are registering your business entry for the first time, please choose the option Primary User.

- **Business User**
Business Users have their organizations already registered in the Oracle iSupport system. You can enter only a single user name. Please register as a Primary User if you are the point of contact in that user's organization. Note: Please use Organization Number from previously registered business entry.

- **Business User (new organization)**
Business Users include new and existing users with no specific relationship to an existing organization.

- **Business User (new organization) (previously registered business entry)**
Primary Users are Point of Contacts for Businesses, Partners, and Organizations. Select this option if you are already registered. You will be responsible for managing all of a given user's user name registration. This includes the validation and approval of users. Note: Select users in the Information for your organization and select the organization to provide the Organization Number of your previously registered business entry.

- **Primary User (Registering a new business entry)**
Primary Users are Point of Contacts for Businesses, Partners, and Organizations. Select this option if you are the first person to register your business entry. You will be responsible for managing all users in your organization. This includes the validation and approval of users. Note: You will act as the Administrator for your business entry.

Next

ORACLE User Registration

Enter your organization information

I want to register for an existing organization.

Here is my organization number:

Next

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iSupport Customer Registration

ORACLE

User Registration

Enter Your Personal Information

*First Name

*Last Name

*User Name

*Password

*Verify Password

*E-mail

Phone Number -

*Indicates Required field
Password should be at least 6 characters long

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iSupport Customer Registration

ORACLE[®]


User Registration

Select Your Enrollments

☒ Self - Service Support over the Web
☒ Business Enrollment for web store

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iSupport Customer Registration




The screenshot shows the Oracle iSupport Customer Registration Confirmation page. At the top, the Oracle logo is displayed. Below it, the title "User Registration" is centered. A confirmation message states: "Thank you for taking the time to register with us. Your information has been received and is currently being reviewed." Below the message is a "Confirmation" section with a table containing user information. The table has two rows: "Confirmation Number" (10252) and "Date" (13-Oct-2002). The second row contains "Name: Dorothy Sheaths", "User Type: Primary User (Designating a new business entity)", "User Name: dsheths", and "Organization Number: 1460". A note below the table states: "Please note your Organization Number. This will be required by your users for verification purposes upon registration." Below the note is a table with two columns: "Confirmation Number" and "Enrollment". The first row shows "10256 Self - Service Support over the Web" and "10256 Business Enrollment for web store". A "Continue" button is located at the bottom right of the page.

ORACLE

User Registration

Thank you for taking the time to register with us. Your information has been received and is currently being reviewed

 Confirmation

User Information	
Confirmation Number: 10252	Date: 13-Oct-2002
Name: Dorothy Sheaths	User Type: Primary User (Designating a new business entity)
User Name: dsheths	Organization Number: 1460

Please note your Organization Number. This will be required by your users for verification purposes upon registration.

Customer Enrollment	
Confirmation Number	Enrollment
10256 Self - Service Support over the Web	10256 Business Enrollment for web store

[Continue](#)

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iSupport Home Page

- ❖ iSupport
- ❖ Administration
- ❖ Profile
- ❖ Sign Out

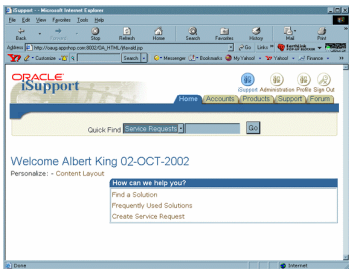
- ❖ Quick Find
- ❖ Find a Solution
- ❖ Frequently Used Solutions
- ❖ Create a Service Request

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iSupport Home Page



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Find a Solution

- ❖ Basic Search (Common Problems)
- ❖ Advanced Search
- ❖ Technical Library

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Find a Solution: Basic Search

Problem	Description	Number of times used
Toshiba laptop does not recognize floppy disk when installed		2
CD-ROM Drive Door does not close		2
Unable to Play Music CD in CD-ROM Drive		1
Cannot Copy Pocket Excel Files to Your Desktop Computer		1
Desktop does not boot		1

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Find a Solution: Advanced Search

Statement	Description
Search For Existing Solutions	

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Find a Solution: Technical Library

Support Company News

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Frequently Used Solutions

- ❖ Common Problems
 - ❖ View Solutions Used
 - ❖ Other Recommended Solutions

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Frequently Used Solutions

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Create a Service Request

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Create a Service Request

*Account Number

*Primary Contact *Contact By

Service Request Details

*Request Type

*Select from products I own

*Product *Version

*Urgency *Problem Code

Project Number

*Request Summary

Attachments

Remove	Attachment	Description
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	
<input type="checkbox"/>	<input type="checkbox"/>	

*Indicates Required Field

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Create a Service Request

ORACLE Support

Quick Find

Create Service Requests

Template

Template Detail

*Did you follow instructions in the Manual?

*Is your product still under warranty?

*Enter a brief description of the problem.

*Indicates Required Field

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Verify Service Request

ORACLE Support

Quick Find

Verify Service Request

Service Request Profile King-01

Contact Information

Account Number Contact By

Service Request Details

Request Type

Product Version

Urgency Problem Code

Project Number

*Request Summary

Attachment Description

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Verify Service Request

Service Request Details

Request Type: Customer Call

Product: GS 15947 - Sentinel Deluxe Desktop

Version: Hardware Problem - Hardware Problem Encountered

Urgency: Inoperable - Systems are inoperable

Problem Code: Hardware Problem - Hardware Problem Encountered

Project Number:

Request Summary: The CD drive door stays open. Tried known fixes. The door still won't close.

Attachments:

Attachment	Description
None	

[Notify Section Above](#)

Template: Troubleshooting

Template Detail:

Did you follow instructions in Manual?

Is your product still under warranty?

Enter a brief description of the problem:

I've attempted all the known fixes. The CD drive door won't close. The approx will not P001.

[Notify Section Above](#)

[Cancel](#) [Back](#) [Submit Service Request](#)

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Submitted Service Request

[Email This to me](#)

Service Request Number: 11544

Contact Information:

Primary Contact: Albert King

Contact By: Email - alking@fmc.com

Account Number: 1608

Created By: Albert King

Service Request Details

Status: Open - Open

Request Type: Customer Call

Date Created: 10-OCT-2002

Project Number:

Urgency: Inoperable

Current Owner: Daugherty, Mr. John

Product: GS 15947 - Sentinel Deluxe Desktop

Version:

Problem Code: Hardware Problem - Hardware Problem Encountered

Request Summary: The CD drive door stays open. Tried known fixes. The door still won't close.

Service Request Log:

1. Is your product still under warranty?

2. Enter a brief description of the problem.

I've attempted all the known fixes. The CD drive door won't close. The approx will not P001.

Attachments:

Attachment	Description
None	

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Call Me

ORACLE SUPPORT

Customer Callback Request

Last Name: King

First Name: Albert

Country Code:

Area Code: 800

Phone Number: 1234

Extension: 1234

Preferred Callback Language: ENGLISH

Call Back Date/Time: 10/10/02 10:00 AM

Please enter your questions, comments:

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Call Routing Process

```

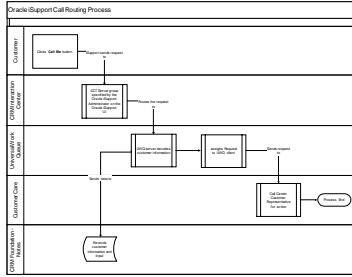
graph TD
    subgraph "Grade 3 Support Call Routing Process"
        direction TB
        subgraph "Customer"
            C1[Customer] -- "Calls Toll-Free Number" --> C2[Call Center]
        end
        subgraph "Call Center"
            C2[Call Center] -- "Calls Call Center Queue" --> C3[Call Center Queue]
        end
        subgraph "Call Center Queue"
            C3[Call Center Queue] -- "Calls Call Center Agent" --> C4[Call Center Agent]
        end
        subgraph "Call Center Agent"
            C4[Call Center Agent] -- "Calls Call Center Agent" --> C5[Call Center Agent]
        end
        subgraph "Call Center Agent"
            C5[Call Center Agent] -- "Calls Call Center Agent" --> C6[Process End]
        end
    end

```

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Customer Support Team



- ❖ Universal Work Queue
- ❖ Field service dispatch

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- ❖ Universal Work Queue
- ❖ Field service dispatch

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Universal Work Queue

Queue	Count	Request	Severity	Status	Summary	Party	Type	Resource Name	Role	Action
My Assignments	152									
My Outgoing	0	11752	High	Open	cover supply to d.	Business	Customer	Jeremy Fauch		
My Inbound Processes	0									
Tasks	0									
Queue Management	0									
Business Events	1									
Group Owned	0									
Team Owned	0									
My Groups	0									
My Teams	0									
Calculators	1									
Level	1									
My Leads (Owner)	0									
My Leads (Sales Team)	0									
My Opportunities (Self)	0									
My Opportunities (Other)	0									
Coaches	0									
Outstanding Leads	0									

Current Work Request

Get Entry

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Event	Count	Request	Severity	Status	Summary	Party	Type	Resource Name	De
PHS Documents (R)	10	11752	High	Open	power supply d.c.	Business	Customer	Idemity	Fajn
PHS Charging	0								
PHS Broken Processors	0								
PHS Team	0								
PHS Change Request	0								
PHS Security									
PHS Group Owned	0								
PHS Team Owned	0								
PHS Group	0								
PHS Team	0								
PHS Locations	1								
PHS Limit 1	1								
PHS Limit (Owner)	0								
PHS Limit (User Test)	0								
PHS Opportunities (R)	0								
PHS Opportunities (R)	0								
PHS Outlets	0								
PHS Running Lists	0								

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Service Request

Customer Information: Name: Lynn, Account: 1809, Location: Business World, Phone: 1809.

Product Information: Product: AS5000, Component: Standard Desktop, Platform: PG, Platform Version: 15649, Operating System Version: 15649, Database Version: 15649, Tier: 15649.

Contract Information: Contract: 15649, Service: W12375, Description: Extended Notebook PC Service Program, Start Date: 14-AUG-2001, End Date: 13-AUG-2006.

Buttons: Add New Contract, All Contracts, Get Contracts, Call Information, Add Work Log, Add Incident, Agent On Break.

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Task Management

Task Information: Number: 14102, Status: In Planning, Owner: Employee Review, Priority: High, Urgency: High, Type: Problem Resolution, Description: Stress, Diane.

Customer Information: Name: Business World, Account: 1809, Phone: 1809.

Buttons: Add New Task, All Tasks, Get Tasks, Call Information, Add Work Log, Add Incident, Agent On Break.

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Escalations

Escalation Information: Number: 14102, Status: Open, Reason: Slow Progress, Date Opened: 28-SEP-2002 14:07, Date Closed: , Target Date: .

Escalation Owner Information: Level: Level 1, Escalation Territory: , Owner: delenny, Faun, Assign: .

Reference Documents: Type: Escalation, Document: Service Request, Number: 1752, Details: power supply is dead.

Buttons: Add New Escalation, All Escalations, Get Escalations, Call Information, Add Work Log, Add Incident, Agent On Break.

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Session Summary

During this session we have covered:

- ❖ The customer view of iSupport
- ❖ How a customer can create a request for service online
- ❖ How the service request information flows into Oracle Customer Support for resolution by a customer service team

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Questions???

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Thank You!

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