

# Merge Approval Workflow

An **Oracle** “How To” Paper  
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*Presented By:*

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This document outlines an Simple Approval Demo flow and configuration for approving the merging of duplicate accounts using the out of the box screens and minor configuration which follows the demo flow.

## Demo Flow

1. Login as USER: SSTEWARD      PASSWORD: Welcome1
2. Click on UCM Account Data Management Tab
3. Click on Duplicate Accounts

Siebel Universal Customer Master

File Edit View Navigate Query Tools Help

Account Duplicates:

Home UCM Account Data Management UCM Hierarchy Management Administration - Runtime Events

Account Source Data Master Accounts Account Explorer Duplicate Accounts Incomplete Transactions Manual Review Merge Request Unmerge Profiles Data Decay Dashboard

Duplicate Accounts Menu Query

Account	Site	Status	Street Address	City	State
Banana Republic		Active			
Banana Republic, Llc	710 SW Yamhill St	Active	710 Sw Yamhill St	PORTLAND	OR
Banana Republic, Llc	9522 SW Washington Sq Rd	Active	9522 Sw Washington Square Rd	PORTLAND	OR
Banana Republic, Llc	256 Grant Ave	Active	256 Grant Ave	SAN FRANCISCO	CA
Banana Republic, Llc	2 Folsom St	Active	2 Folsom St	SAN FRANCISCO	CA
The Gap Inc	68 Madison St	Active	68 Madison St	SEATTLE	WA
Old Navy Inc.	1 Folsom	Active	1 Folsom St	SAN FRANCISCO	CA
The Gap Inc	1051 Southcenter Mall	Active	1051 Southcenter Mall	TUKWILA	WA
The Gap Inc	401 Ne Northgate Way	Active	401 Ne Northgate Way	SEATTLE	WA
The Gap Inc	890 Market St	Active	890 Market St	SAN FRANCISCO	CA
The Gap Inc	2 Folsom St	Active	2 Folsom St	SAN FRANCISCO	CA
Old Navy Inc.	601 Pine St	Active	601 Pine St	SEATTLE	WA

Banana Republic, Llc

Menu Query

Account: Banana Republic, Llc Site: 256 Grant Ave

4. Click on Record such as Banana Republic at 256 Grant Avenue

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Account Duplicates: Banana Republic, Llc > Account:

Home UCM Account Data Management UCM Hierarchy Management Administration - Runtime Events

Account Source Data Master Accounts Account Explorer Duplicate Accounts Incomplete Transactions Manual Review Merge Request Unmerge Profiles Data Decay Dashboard

Account

Menu New Delete Query Submit Data Management

Account Name: \* Banana Republic, Llc Site: 256 Grant Ave Account Team: SADMIN Status: Active

Address: 256 Grant Ave State: CA Main Phone #: (415) 788-3087 Account Type: \* Customer

Address Line 2: Zip Code: 94108-4604 Main Fax #: CSN: 951A-D52DN

City: SAN FRANCISCO Country: UNITED STATES URL: Employees At Site:

More Info Historical Version Source Cross Reference Audit Trail Alerts Privacy Duplicate Accounts Relationships Contacts Addresses Account Affiliations Attachments Activities Opportunities

Menu Merge Guided Merge

Seq #	Score	Account	Site	Address	City	State	Zip Code	Country
80		Banana Republic, Llc	9522 SW Washington Sq Rd	9522 Sw Washington Squa	PORTLAND	OR	97223-4449	UNITED STATES

Being crazy isn't enough.  
Dr. Seuss  
Writer

5. Modify the Status Field on the Account Record to "Submit for Approval"
6. Click the Submit button on the tool bar (this places this record in the Inbox of DSTEWARD)

7. Login as USER: DSTEWARD      PASSWORD: Welcome1
8. Scroll Down to the bottom of the home page.

**My Inbox Items**

Due	Type	Priority	Item
> 2/1/2012 06:00:00	UCM Account	High	Account 9SIA-D52DN : Banana Republic, Llc : Submit for Approval: Created 01/31/2012 14:15:07
1/31/2012 09:45:37	Task		UCM Merge Account Task
2/1/2012 06:00:00	UCM Account	High	Account 9SIA-D52GG : Old Navy Inc. : Submit for Approval: Created 01/31/2012 09:32:45

9. Drill Down on the “Submit for Approval” record in the “My Inbox Items”
10. In the Inbox Items List screen – Change the Action to received and step off the record.

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File Edit View Navigate Query Tools Help

Inbox Item:

Home UCM Account Data Management UCM Hierarchy Management **Inbox**

**Inbox Items List** | Completed Items List | Submitted Items List

Inbox Items | Menu | Delete Task | Transfer | Query

Completed	Category	Name	From	Action	Priority
>		Account 9SIA-D52DN : Banana Republic, Llc : Submit for Approval: Created 01/31/2012 14:15:07	David Steward	Received	High

11. The Action field will now be drillable.
12. Click on the word “Received”
13. The Duplicate Accounts Field should be displayed.

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File Edit View Navigate Query Tools Help

Inbox Item: Account 9SIA-D52DN : Banana Republic, Llc : Submit for Approval: Created 01/31/2012 14:15:07 > Account:

Home UCM Account Data Management UCM Hierarchy Management **Inbox**

Account Source Data | **Master Accounts** | Account Explorer | Duplicate Accounts | Incomplete Transactions | Manual Review | Merge Request | Unmerge Profiles | Data Decay Dashboard

**Account**

Menu | New | Delete | Query | Submit | Data Management

Account Name: * Banana Republic, Llc	Site: 256 Grant Ave	Account Team: SADMIN	Status: Submit for Approval
Address: 256 Grant Ave	State: CA	Main Phone #: (415) 788-3087	Account Type: * Customer
Address Line 2:	Zip Code: 94108-4604	Main Fax #:	CSN: 9SIA-D52DN
City: SAN FRANCISCO	Country: UNITED STATES	URL:	Employees At Site:

More Info | Historical Version | Source Cross Reference | Audit Trail | Alerts | Privacy | **Duplicate Accounts** | Relationships | Contacts | Addresses | Account Affiliations | Attachments | Activities | Opportunities

Menu | Merge | Guided Merge

Seq #	Score	Account	Site	Address	City	State	Zip Code	Country
> 80		Banana Republic, Llc	9522 SW Washington Sq Rd	9522 Sw Washington Squa	PORTLAND	OR	97223-4449	UNITED STATES

14. Click on the Guided Merge

*He gains everyone's approval  
who mixes the pleasant with the  
useful.*

*Quintus Horace  
Roman Poet*

Siebel Universal Customer Master

File Edit View Navigate Query Tools Help

Home UCM Account Data Management UCM Hierarchy Management Inbox

**Current Task** x

UCM Merge Account Task

Field Level Adjustment

**UCM Merge Account Task: Field Level Adjustment**

Field Name	Survivor	Victim	Suggested
*Type	Customer	Customer	Customer
Main Phone Number	4157883087		4157883087
*Name	Banana Republic, Llc	Banana Republic, Llc	Banana Republic, Llc
Main Fax Number			
> Location	256 Grant Ave	9522 SW Washington Sq Rd	9522 SW Washington Sq Rd

15. Click Next
16. Click Submit
17. Show that the Status of the Account is Active.

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File Edit View Navigate Query Tools Help

Home UCM Account Data Management UCM Hierarchy Management Inbox

Account Source Data Master Accounts Account Explorer Duplicate Accounts Incomplete Transactions Manual Review Merge Request Unmerge Profiles Data Decay Dashboard

**Account**

Menu New Delete Query Submit Data Management

Account Name: \* Banana Republic, Llc Site: 9522 SW Washington Sq Address: 9522 Sw Washington State: OR Address Line 2: Zip Code: 97223-4449 City: PORTLAND Country: UNITED STATES Account Team: SADMIN Main Phone #: (415) 788-3087 Main Fax #: URL: Status: Active Account Type: \* Customer CSN: 9SIA-D52CR Employees At Site:

More Info Historical Version Source Cross Reference Audit Trail Alerts Privacy Duplicate Accounts Relationships Contacts Addresses Account Affiliations Attachments Activities

Menu Merge Guided Merge

Seq #	Score	Account	Site	Address	City	State	Zip Code	Country
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18. Click on the Inbox Tab
19. Change "Action" on the Account Record to Approved

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File Edit View Navigate Query Tools Help

Home UCM Account Data Management UCM Hierarchy Management Inbox Account Data Entry

Inbox Item:

**Inbox Items List** Completed Items List Submitted Items List

My Inbox Items Menu Delete Task Transfer Query

Completed	Category	Name	From	Action	Priority
>		Account 9SIA-D52DN : Banana Republic, Llc : Submit for Approval: Created 01/31/2012 14:15:07	David Steward	Approved	High
		UCM Merge Account Task	David Steward		
		Account 9SIA-D52GG : Old Navy Inc. : Submit for Approval: Created 01/31/2012 09:32:45	Stuart Steward	Received	High

*A man cannot be comfortable  
without his own approval.*

*Mark Twain  
Author and Humorist*

**ORACLE**

Merge Approval Workflow by Douglas Forbes and William Indest

## Configuration for Approval Workflow:

The following configuration adds the value “Submit for Approval” to the drop down values for Account Status.

### Add Value to LOV

1. Login to the Siebel Client as User: DSTEWARD Password: Welcome1
2. Click on the Site Map (Globe)
3. Click on Administration – Data
4. Choose List of Values
5. Click on the Query Button
6. Enter ACCOUNT\_STATUS in the type Field and click Go
7. Click on the New Button
8. Enter the Data in the following fields:
 

Type:	ACCOUNT_STATUS
Display Value:	Submit for Approval
Language-Independent Code:	Submit for Approval
Order:	9
9. Step off the record.
10. Click the clear cache

### Modify the Drill Down Object

This configuration adds the drill down from Inbox status field to the UCM Duplicate Accounts View.

1. Launch Windows Tier
2. Launch Siebel Tools
3. Query for the Applet – UInbox Item Task List Applet
4. Lock the Applet
5. Click on the Drill down Object Branch under the Applet
6. Right Click in the Drill Down Object Screen – Select New
7. Enter the Values into the new fields:
 

Name:	Action
Hyperlink Field:	Action
View:	UCM Account Duplicated Detail View
Source Field:	Item Object Id
Business Component:	Account
8. Step off the record
9. Compile the Applet

### Modify the Workflow

This configuration adds the Values “Submit for Approval” to the branches of the workflow.

1. Open Siebel Tools
2. Open Workflow Process
3. Select the “UCM Account Inbox Approval Process” with the Status of Completed

*You can use all the quantitative data you can get, but you still have to distrust it and use your own intelligence and judgment.*

*Alvin Toffler  
Futurist*

4. Click the Revise Button on the Toolbar
5. Select the "UCM Account Inbox Approval Process" with the Status of In Progress
6. Right Click – Edit Workflow Process
7. In the Workflow Process Canvas click on the "Start" Line
8. In the Compose Condition Criteria Screen choose the Condition Line
9. Click the new button beside the Values window, Choose "Submit for Approval"
10. Click Ok
11. Click Update
12. Click Ok
13. Click on the connector with the label Inactive
14. Click the new button beside the Values window, Choose ""Submit for Approval""
15. Click Ok
16. Click Update
17. Click Ok
18. Click on the Publish Activate Icon
19. Login to the Siebel Client as User: DSTEWARD Password: Welcome1
20. Click on the Site Map, Select Administration – Runtime Events, Then Click on Administration - Run Time Events
21. Click on Menu – Reload Runtime Events.

Configuration Complete. Time to Eat and Drink.

*I'm on the patch right now.  
Where it releases small dosages  
of approval until I no longer  
crave it, and then I'm gonna rip  
it off.*

*Ellen DeGeneres  
Comediienne*



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