

White Paper: Advanced Collections - Implementing Different Strategies for Different Operating Units using Strategy Filters

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Objective

The Objective of this document is to explain how we implemented Different Strategies for Different Operating Units in Advanced Collections using Strategy Filters

Business Requirement

Our client is implementing Advanced Collections on a Multi-Org environment. The Client has operations in many countries and each country is defined as an operating unit. The work culture is different in most of the countries and hence the Collections Strategies are also different. A common global strategy cannot be applied to the Accounts of different countries and hence the need to have different strategies assigned to the Accounts pertaining to different operating units.

Setups

The existing setups are as follows

1. Strategy is defined to run at the 'Account' Level
2. One Account exists only in One Org (All transactions created for one account are created only from One Org)
3. The 'Delinquency Status Determination' scoring engine determines the delinquency status as either 'CURRENT' or 'DELINQUENT'

Solution

To implement the solution for this requirement, we use Filters. The complete solution for the configuration of filters is summarized in the following activities

- 1) For the purpose of explanation, let us assume the following

- a. The Client has 5 orgs

Org_Id	Name
1001	Vision Operations USA
1002	Vision Operations Australia
1003	Vision Operations UK
1004	Vision Operations India
1005	Vision Operations Mexico

- b. Out of these 5 orgs, we need to assign different strategies for India and Mexico org. The other 3 orgs have the same strategy. Each country has two strategies 'Account Hard Strategy' and 'Account Soft Strategy'.

2) We therefore define six different strategies as follows

Strategy Name	Score	Strategy to be used for
IN Account Soft Strategy	50	India
IN Account Hard Strategy	1	India
MX Account Soft Strategy	50	Mexico
MX Account Hard Strategy	1	Mexico
Global Account Soft Strategy	50	USA, Australia and UK
Global Account Hard Strategy	1	USA, Australia and UK

3) Create a Collections Lookup to store the Org information for those orgs that needs org specific strategies. The Code value is the Org_id
(N) Collections Forms Administrator > Lookups

Type	IEX_STRATEGY_ORG_FILTER					
Meaning	IEX_STRATEGY_ORG_FILTER					
Application	Collections					
Description	Lookup Values for Orgs having Org specific Strategies					
Access Level	User					
Code	Meaning	Description	Tag	Effective From	Effective To	Enabled
1004	India Org			01-Jan-1952		Y
1005	Mexico Org			01-Jan-1952		Y

The values of this lookup can be checked as follows

```
select lookup_code from fnd_lookup_values_vl
where lookup_type = 'IEX_STRATEGY_ORG_FILTER'
AND VIEW_APPLICATION_ID=695
AND enabled_flag = 'Y' ;
```

4) Create Views for the filters – We create three views here. The view name must start with 'IEX_F' and must be created in the APPS schema)

a. For India Org:

```
create or replace view IEX_F_IN
as select distinct cust_account_id, org_id from
IEX_DELINQUENCIES_ALL
where STATUS <> 'CURRENT' and org_id = 1004 ;
```

b. For Mexico Org:

```
create or replace view IEX_F_MX
as select distinct cust_account_id, org_id from
IEX_DELINQUENCIES_ALL
```

where STATUS <> 'CURRENT' and org_id = 1005 ;

- c. For Other Orgs:
 create or replace view IEX_F_OTHER
 as select distinct cust_account_id, org_id from
 IEX_DELINQUENCIES_ALL
 where STATUS <> 'CURRENT'
 and org_id NOT IN (select lookup_code
 from fnd_lookup_values_vl
 where lookup_type = 'IEX_STRATEGY_ORG_FILTER'
 AND VIEW_APPLICATION_ID=695
 AND enabled_flag = 'Y');

- 5) Create Filters – We create three filters here. The filter name must start with 'IEX_F'. To create the filter
 - a. Using the Collections HTML Administrator responsibility or Collections HTML Manager responsibility, navigate to Administration > Strategy. The Strategy Summary Page appears
 - b. On the Strategy Summary page, the six strategies as mentioned in step 2 above will appear.
 - c. Click the Link on the Filter column for 'IN Account Soft Strategy' strategy.
 - d. Specify the following values and create the filter

Filter Type	Strategy Filter
Filter Name	IEX_F_IN
Filter Active	Y
View Name	IEX_F_IN
Select Column	cust_account_id

- e. Follow the same process to create filters for all 6 strategies. The summarized table shows the mapping of the Strategies, filters and the views

Strategy Name	Filter Name	View Name
IN Account Soft Strategy	IEX_F_IN	IEX_F_IN
IN Account Hard Strategy	IEX_F_IN_1	IEX_F_IN
MX Account Soft Strategy	IEX_F_MX	IEX_F_MX
MX Account Hard Strategy	IEX_F_MX_1	IEX_F_MX
Global Account Soft Strategy	IEX_F_OTHER	IEX_F_OTHER
Global Account Hard Strategy	IEX_F_OTHER_1	IEX_F_OTHER

The Filter name must be unique

- 6) We are now done with the setups. If we now run the 'IEX: Strategy Management' concurrent program, All delinquent accounts of India org will be assigned the India Strategy, all delinquent accounts of Mexico org will be assigned the Mexico Strategy and all delinquent accounts of USA, UK and AU will be assigned the Global Strategy.

- 7) With this approach, at a later point of time, if there is a need for any other org that currently has Global Strategy to have an Org specific strategy (lets say Australia), we do the following
 - a. Add a Lookup code for Australia in the 'IEX_STRATEGY_ORG_FILTER' lookup
 - b. Create Strategies for Australia Org
 - c. Create a view IEX_F_AU for Australia Org (Refer Step 4 for view creation)
 - d. Create filters for Australia Strategies and assign the view IEX_F_AU to the filter.

Summary

This solution details one approach for Implementing Different Strategies for Different Operating Units.

References

Oracle Advanced Collections Implementation Guide
Oracle Advanced Collections User Guide