PeopleSoft®

PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook

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PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook
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Open Source Disclosure

Contents

Part 2
PeopleSoft Order Capture

About This PeopleBook

PeopleBooks provide you with the information that you need to implement and use PeopleSoft applications.

This preface discusses:

- PeopleSoft application prerequisites.
- PeopleSoft application fundamentals.
- Related documentation.
- Typographical conventions and visual cues.
- Comments and suggestions.
- Common elements in PeopleBooks.

Note. PeopleBooks document only page elements that require additional explanation. If a page element is not documented with the process or task in which it is used, then either it requires no additional explanation or it is documented with common elements for the section, chapter, PeopleBook, or product line. Elements that are common to all PeopleSoft applications are defined in this preface.

PeopleSoft Application Prerequisites

To benefit fully from the information that is covered in these books, you should have a basic understanding of how to use PeopleSoft applications.

You might also want to complete at least one PeopleSoft introductory training course.

You should be familiar with navigating the system and adding, updating, and deleting information by using PeopleSoft windows, menus, and pages. You should also be comfortable using the World Wide Web and the Microsoft Windows or Windows NT graphical user interface.

These books do not review navigation and other basics. They present the information that you need to use the system and implement your PeopleSoft applications most effectively.

PeopleSoft Application Fundamentals

Each application PeopleBook provides implementation and processing information for your PeopleSoft database. However, additional, essential information describing the setup and design of your system appears in a companion volume of documentation called the application fundamentals PeopleBook. Each PeopleSoft product line has its own version of this documentation.

The application fundamentals PeopleBook consists of important topics that apply to many or all PeopleSoft applications across a product line. Whether you are implementing a single application, some combination of applications within the product line, or the entire product line, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

You can find updates and additional documentation for this release, as well as previous releases, on the PeopleSoft Customer Connection website. Through the Documentation section of PeopleSoft Customer Connection, you can download files to add to your PeopleBook Library. You'll find a variety of useful and timely materials, including updates to the full PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM.

Important! Before you upgrade, you must check PeopleSoft Customer Connection for updates to the upgrade instructions. PeopleSoft continually posts updates as the upgrade process is refined.

See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

Ordering Printed Documentation

You can order printed, bound volumes of the complete PeopleSoft documentation that is delivered on your PeopleBooks CD-ROM. PeopleSoft makes printed documentation available for each major release shortly after the software is shipped. Customers and partners can order printed PeopleSoft documentation by using any of these methods:

- Web
- Telephone
- Email

Web

From the Documentation section of the PeopleSoft Customer Connection website, access the PeopleBooks Press website under the Ordering PeopleBooks topic. The PeopleBooks Press website is a joint venture between PeopleSoft and MMA Partners, the book print vendor. Use a credit card, money order, cashier's check, or purchase order to place your order.

Telephone

Contact MMA Partners at 877 588 2525.

Email

Send email to MMA Partners at peoplesoftpress@mmapartner.com.

See Also

PeopleSoft Customer Connection, https://www.peoplesoft.com/corp/en/login.jsp

Typographical Conventions and Visual Cues

This section discusses:

- Typographical conventions.
- Visual cues.
- Country, region, and industry identifiers.
- Currency codes.

Typographical Conventions

This table contains the typographical conventions that are used in PeopleBooks:

Typographical Convention or Visual Cue	Description
Bold	Indicates PeopleCode function names, method names, language constructs, and PeopleCode reserved words that must be included literally in the function call.
Italics	Indicates field values, emphasis, and PeopleSoft or other book-length publication titles. In PeopleCode syntax, italic items are placeholders for arguments that your program must supply. We also use italics when we refer to words as words or letters as letters, as in the following: Enter the letter *O*.
KEY+KEY	Indicates a key combination action. For example, a plus sign (+) between keys means that you must hold down the first key while you press the second key. For ALT+W, hold down the ALT key while you press the W key.
`Monospace font`	Indicates a PeopleCode program or other code example.
“ ” (quotation marks)	Indicate chapter titles in cross-references and words that are used differently from their intended meanings.
. . . (ellipses)	Indicate that the preceding item or series can be repeated any number of times in PeopleCode syntax.
{ } (curly braces)	Indicate a choice between two options in PeopleCode syntax. Options are separated by a pipe (|).

Typographical Convention or Visual Cue	Description
[ ] (square brackets)	Indicate optional items in PeopleCode syntax.
& (ampersand)	When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object. Ampersands also precede all PeopleCode variables.

Visual Cues

PeopleBooks contain the following visual cues.

Notes

Notes indicate information that you should pay particular attention to as you work with the PeopleSoft system.

Note. Example of a note.

If the note is preceded by *Important!*, the note is crucial and includes information that concerns what you must do for the system to function properly.

Important! Example of an important note.

Warnings

Warnings indicate crucial configuration considerations. Pay close attention to warning messages.

Warning! Example of a warning.

Cross-References

PeopleBooks provide cross-references either under the heading "See Also" or on a separate line preceded by the word *See*. Cross-references lead to other documentation that is pertinent to the immediately preceding documentation.

Country, Region, and Industry Identifiers

Information that applies only to a specific country, region, or industry is preceded by a standard identifier in parentheses. This identifier typically appears at the beginning of a section heading, but it may also appear at the beginning of a note or other text.

Example of a country-specific heading: "(FRA) Hiring an Employee"

Example of a region-specific heading: "(Latin America) Setting Up Depreciation"

Country Identifiers

Countries are identified with the International Organization for Standardization (ISO) country code.

See Appendix A, "ISO Country and Currency Codes," ISO Country Codes.

Region Identifiers

Regions are identified by the region name. The following region identifiers may appear in PeopleBooks:

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

Industries are identified by the industry name or by an abbreviation for that industry. The following industry identifiers may appear in PeopleBooks:

- USF (U.S. Federal)
- E&G (Education and Government)

Currency Codes

Monetary amounts are identified by the ISO currency code.

See Appendix A,"ISO Country and Currency Codes," ISO Currency Codes.

Comments and Suggestions

Your comments are important to us. We encourage you to tell us what you like, or what you would like to see changed about PeopleBooks and other PeopleSoft reference and training materials. Please send your suggestions to:

PeopleSoft Product Documentation Manager PeopleSoft, Inc. 4460 Hacienda Drive Pleasanton, CA 94588

Or send email comments to doc@peoplesoft.com.

While we cannot guarantee to answer every email message, we will pay careful attention to your comments and suggestions.

Common Elements in These PeopleBooks

As of Date — The last date for which a report or process includes data.

Business Unit — An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.

Description — Enter up to 30 characters of text.

Effective Date — The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when you can view and change the information. Pages or panels and batch processes that use the information use the current row.

Once, Always, and **Don't Run** — Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run.

Select Always to run the request every time the batch process runs.

Select Don't Run to ignore the request when the batch process runs.

Report Manager — Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).

Process Monitor — Click to access the Process List page, where you can view the status of submitted process requests.

Run — Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.

Request ID — An ID that represents a set of selection criteria for a report or process.

User ID — An ID that represents the person who generates a transaction.

SetID — An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.

Short Description — Enter up to 15 characters of text.

PeopleSoft Order Capture Applications Preface

This preface discusses:

- *PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook.*
- *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook.*
- PeopleTools PeopleBooks.

PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook

The *PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook* discusses how to set up and use functionality delivered by these three independently licensed CRM applications:

- PeopleSoft Order Capture.
- PeopleSoft Order Capture Self Service.
- PeopleSoft Mobile Order Capture.

Note. PeopleSoft Real-Time Advisor, PeopleSoft Configurator, and PeopleSoft Mobile Configurator, which are also part of the PeopleSoft Enterprise CRM Sales suite of applications.

Part I: Order Capture Applications

The Order Capture Applications part of the *PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook*contains the following chapters:

- *PeopleSoft Enterprise CRM 8.9 Order Capture Applications Preface.*

  This chapter provides an overview of the *PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook* and the *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook.*

- *Getting Started with PeopleSoft Order Capture Applications.*

  This chapter provides an overview of business processes, integrations, and implementation steps for Order Capture applications.

  Note. The explanation of implementation steps in this PeopleBook is limited to PeopleSoft Order Capture, PeopleSoft Order Capture Self Service, and PeopleSoft Mobile Order Capture.

  Installation information for PeopleSoft Order Capture, PeopleSoft Order Capture Self Service, and PeopleSoft Mobile Order Capture appears in the *PeopleSoft CRM Installation Guide,* which is available on Customer Connection.

Part II: PeopleSoft Order Capture

The PeopleSoft Order Capture part of the *PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook* contains the following chapters:

- *Navigating in PeopleSoft CRM Order Capture applications.*

  This chapter explains how to navigate to the principle order capture setup, management, and maintenance pages for orders, quotes, products, pricing, and Advisor functions.

- *Defining PeopleSoft Order Capture Business Units.*

  This chapter explains how to set up and define Order Capture business units.

- *Setting Up PeopleSoft Order Capture.*

  This chapter explains how to use the PeopleSoft Order Capture workbenches to set up your order capture preferences. It also explains how to define carriers and advanced tax options.

- *Understanding Product, Pricing, and Catalog Setup.*

  This chapter explains how to set up the base tools required for interactive selling, in the form of products, pricing, and catalogs.

- *Working with PeopleSoft Order Capture Business Projects.*

  This chapter explains the three PeopleSoft Order Capture business projects: *order, quote,* and *order maintenance.*

- *Integrating with Fulfillment and Billing Systems.*

  This chapter explains how PeopleSoft Order Capture integrates with fulfillment systems such as PeopleSoft Enterprise Supply Chain Management, and with billing systems such as PeopleSoft Enterprise Contracts.

- *Managing Orders and Quotes.*

  This chapter explains how a customer service representative can personalize and use the PeopleSoft Order Capture entry form to manage orders and quotes.

- *Understanding Order Capture Integration with PeopleSoft Claims Presentment and Banking Transactions.*

  This chapter describes how to integrate with PeopleSoft CRM insurance and financial industry solutions.

- *Working with Interactive Reports for PeopleSoft Order Capture.*

  This chapter explains how to use analytics, such as order metrics reports and order revenue reports, to better understand the behavior of your order capture system.

PART III: PeopleSoft Order Capture Self Service

The PeopleSoft Order Capture Self Service part of the *PeopleSoft Enterprise Order Capture Applications 8.9 PeopleBook* contains the following chapters:

- *Defining PeopleSoft Order Capture Self Service Business Units.*

  This chapter explains how to set up and define Order Capture Self Service business units.

- *Setting Up PeopleSoft Order Capture Self Service.*

  This chapter explains how to set up PeopleSoft Order Capture Self Service.

- *Using Order Capture Self Service.*

  This chapter explains how to use PeopleSoft Order Capture Self Service.

Part IV: PeopleSoft Mobile Order Capture

The PeopleSoft Mobile Order Capture part of the *PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook* contains the following chapters:

- *Understanding PeopleSoft Mobile Order Capture.*

This chapter provides an overview of the business processes available in PeopleSoft Mobile Order Capture, and provides links to relevant mobile tools documentation. It also outlines the synchronization functionality that is available between the mobile solution and PeopleSoft Order Capture .

- *Setting Up PeopleSoft Mobile Order Capture.*

  This chapter discusses how to implement and set up PeopleSoft Mobile Order Capture on your mobile device. The chapter includes a general checklist and a set of links to relevant mobile documentation (rather than reproducing that documentation).

- *Using PeopleSoft Mobile Order Capture.*

  This chapter explains the features of PeopleSoft Mobile Order Capture.

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook

Essential information describing the setup and design of your CRM system appears in a companion volume of documentation called *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook.*

Note. Each PeopleSoft product line has its own version of this documentation.

The *PeopleSoft CRM 8.9 Application Fundamentals PeopleBook* contains topics that apply to many or all PeopleSoft applications across the CRM product line. Whether you implement a single application, some combination of applications within the product line, or the entire PeopleSoft CRM system, you should be familiar with the contents of this central PeopleBook. It is the starting point for fundamentals, such as setting up control tables and administering security.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook

PeopleTools PeopleBooks

Cross-references to PeopleTools documentation refer to the PeopleTools 8.45 PeopleBooks.

PART 1

Order Capture Applications

Chapter 1
Getting Started with PeopleSoft Enterprise CRM Order Capture Applications

CHAPTER 1

Getting Started with PeopleSoft Enterprise CRM Order Capture Applications

This chapter provides an overview of PeopleSoft Enterprise Order Capture applications and discusses:

- PeopleSoft Order Capture business processes.
- PeopleSoft Order Capture process flow.
- PeopleSoft Order Capture integrations.
- PeopleSoft Order Capture, PeopleSoft Order Capture Self Service, and PeopleSoft Mobile Order Capture implementation.

Note. Although PeopleSoft Order Capture and PeopleSoft Order Capture Self Service are separately licensed applications, most references to business processes and implementation steps in this chapter apply equally to both applications.

PeopleSoft Enterprise Order Capture Applications Overview

PeopleSoft Customer Relationship Management (PeopleSoft CRM) offers several distinct applications each of which contributes to the interactive selling experience:

- *PeopleSoft Enterprise Order Capture.*

  This internally facing application is a robust customer relationship management (CRM) order management tool that enables customer sales representatives (CSRs) or sales representatives to manage orders and quotes.
- *PeopleSoft Enterprise Order Capture Self Service*.

  This externally facing application enables web users—such as brokers, business customers, and consumer customers—to easily create and manage their own orders and quotes.
- *PeopleSoft Enterprise Mobile Order Capture.*

  This application enables PeopleSoft Order Capture users to synchronize orders and quotes to and from their disconnected mobile devices. It enables sales representatives to use disconnected laptops to enter orders and quotes, track orders and quotes, and view customer and product information. Mobile users can easily synchronize orders to and from the main PeopleSoft CRM server, and convert leads or opportunities from PeopleSoft Mobile Sales to a quote or order.

PeopleSoft Order Capture Applications Business Processes

This section discusses the business processes that you can perform using PeopleSoft Order Capture applications.

See *PeopleSoft Enterprise CRM 8.9 Mobile Applications PeopleBook.*

Business Processes for Order Capture Applications

PeopleSoft Order Capture applications utilize:

- The CRM customer data model (CDM, also referred to as the business object relationship model [BORM]).

  The CDM (or BORM) is a powerful tool with which you can define the structure of your customer base and the relationships between various business entities such as companies, sites, partners, resellers, or consumer families. The BORM enables businesses with complex business models to define this data structure within their CRM systems, which controls system behavior, workflow, and business rules according to that definition.

  See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook.*

- The CRM product data model.

  This data model enables the definition and creation of the products and services the PeopleSoft software will support. You have numerous options in doing so such as, dynamic packages, nested packages, product relationships, and complex configurations.

  See *PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook*, "Setting Up Products".

- PeopleSoft Enterprise Pricer.

  This pricing tool uses the latest PeopleTools technologies to deliver a robust, high-performance engine. It integrates seamlessly with Order Capture applications to apply complex pricing structures and scenarios. PeopleSoft Enterprise Pricer has an intuitive user interface that is geared to use by your marketing managers.

  See *PeopleSoft Enterprise Pricer 8.9 PeopleBook*, "PeopleSoft 8.9 Enterprise Pricer for CRM Preface".

- CRM catalog.

  CRM catalog functionality is available to Order Capture applications. With it, you can create region-specific catalogs, display template configurations, apply permission-filtering, and enable product comparisons. CRM catalogs integrate fully with PeopleSoft Order Capture, Order Capture Self Service, and PeopleSoft Advisor for the purpose of product, service, or solution recommendations. Additionally, Catalog Search employs the Verity search engine.

  See *PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook*, "Creating Catalogs".

PeopleSoft Order Capture

PeopleSoft Order Capture offers these features:

- Order and quote management.

  PeopleSoft Order Capture delivers order and quote management functionality for both tangible and nontangible products, such as services. (For example, a monthly service agreement for cable television service is a service product.)

- PeopleSoft Order Capture workbenches.

  PeopleSoft Order Capture workbenches are unique to the enterprise, and they perform three main functions. First, they are a central navigation point from which you can set up PeopleSoft Order Capture and Order Capture Self Service, after you have defined your business units. The system consolidates specific setup tasks into one of three workbenches: Setup Workbench, Capture Type Workbench, and Integration Workbench. These workbenches all appear in the Set Up CRM, Product Related, Order Capture menu.

  Second, you can configure the 'look and feel' of the Order Capture runtime pages by defining and then selecting specific display templates.

  Third, you can create application class sets and plug the logic of those application classes into a workbench feature to create new events for your order capture business process.

Note. The Customer Connection document "Understanding Application Classes in PeopleSoft Order Capture and PeopleSoft Order Capture Self Service" explains how to harness the power of application classes.

- Functional Area Navigation (FAN) pages, personalizations, and hotkeys.

  CSRs can begin their interactive selling activities from a FAN page that provides one-click access to the main features of PeopleSoft Order Capture. Customer Service administrators can personalize the look and feel of the order entry form for CSRs and CSRs can use hotkeys for rapid data entry.

- Integration with fulfillment.

  PeopleSoft Order Capture provides integration with both PeopleSoft and third party fulfillment systems or supply chain management products. For example, there is a tight integration with PeopleSoft Supply Chain Management (PeopleSoft SCM) so that order fulfillment and detailed maintenance activity is possible.

Note. Enterprise integration points (EIPs) support the sending and receiving of orders, quotes, product availability, and order status information.

- Order capture business projects.

  Configurable business projects power order fulfillment. Business projects enable you to configure the phases, tasks, and events that occur once an orderis submitted.

- Interactive Reports.

  PeopleSoft Order Capture delivers instant, detailed business analytics information for revenue and metrics. User roles control access to enterprise-wide report information.

- Quick Create.

  PeopleSoft Order Capture enables you to create customers, consumers, and contacts while you are in the midst of a transaction without having to navigate to the standard setup components to define customer information.

- Correspondence management.

  PeopleSoft Order Capture can establish automatic correspondences using email or print for order or quote maintenance, or submission activity. Also, CSRs can generate correspondences manually by clicking the Send Correspondence button on the Entry Form page.

- Support for taxes, including value-added tax (VAT).

  PeopleSoft Order Capture integrates with Taxware, Vertex, and WorldTax software applications to calculate and display tax information directly on order forms.

- Integration to Agreements.
- Integration with PeopleSoft Proposal Management.
- Bulk order creation and maintenance.
- Credit card integration.
- Freight integration with ConnectShip.

PeopleSoft Order Capture Self Service

In addition to most PeopleSoft Order Capture features, Order Capture Self Service delivers:

- Support for self-service registration and profile and address maintenance.
- A Contact Us feature that includes real-time chat with a CSR.

- Security roles and privileges that control what a self-service user sees.
- Quick entry, to enable the rapid creation of orders.
- Order tracking functionality.
- Other standard self-service features, such as Checkout and Shopping Cart.

PeopleSoft Mobile Order Capture

PeopleSoft Mobile Order Capture enables implementers and remote sales representatives to use laptops to:

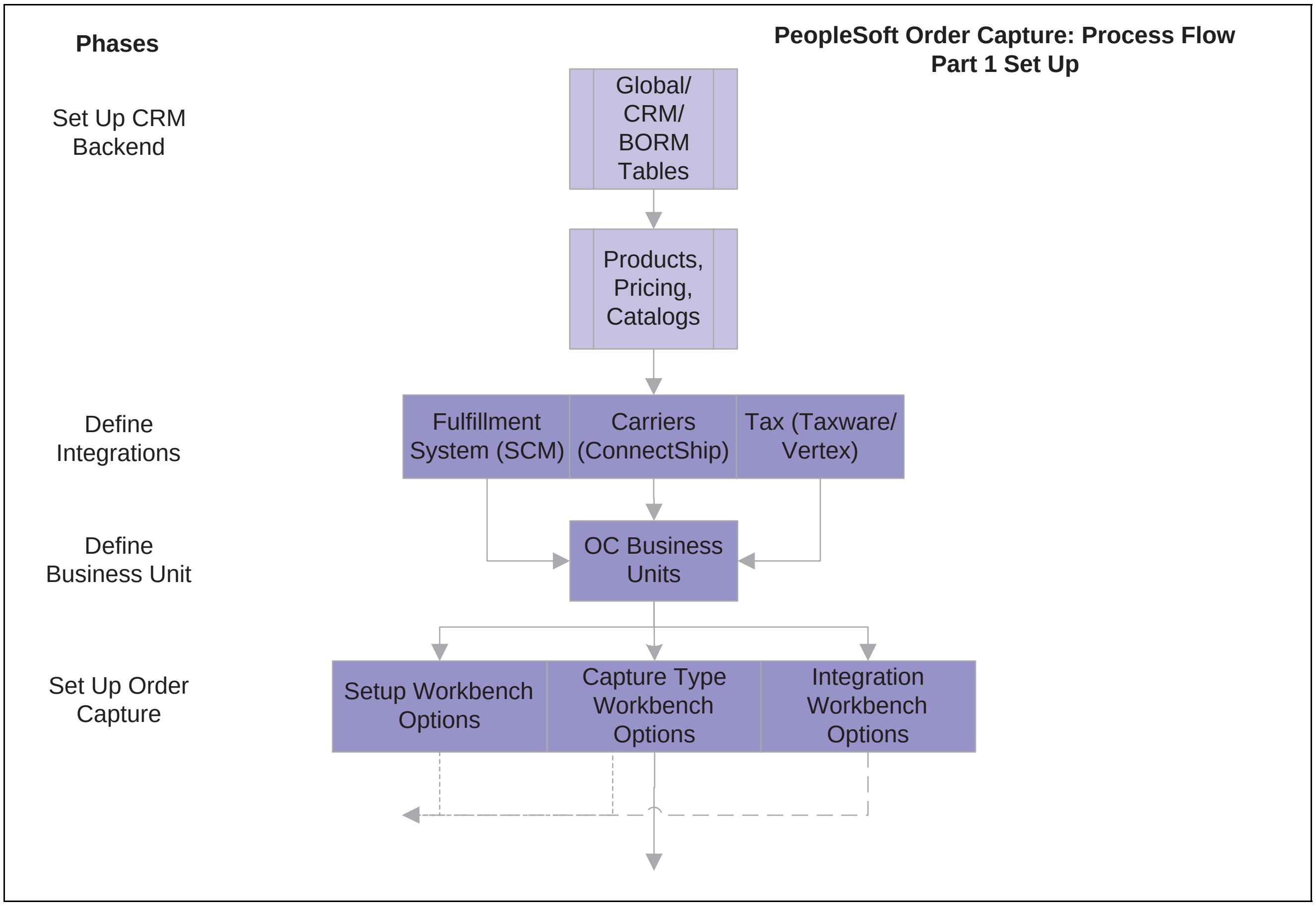
- (Implementers only) Configure synchronization rules and options, when in a connected environment.
- Search for products using a variety of criteria, such as product ID, description, or category.
- View product details, including images, notes, and attachments.
- View detailed product list price information.
- Search, view, and add products to quotes and orders.
- Search for quotes and orders.
- View quote and order line details.
- Add or view notes and attachments for products and orders.
- Submit orders and quotes.
- View holds.
- Convert sales leads or opportunities to quotes or orders.

See *PeopleSoft Enterprise CRM 8.9 Mobile Applications PeopleBook*.

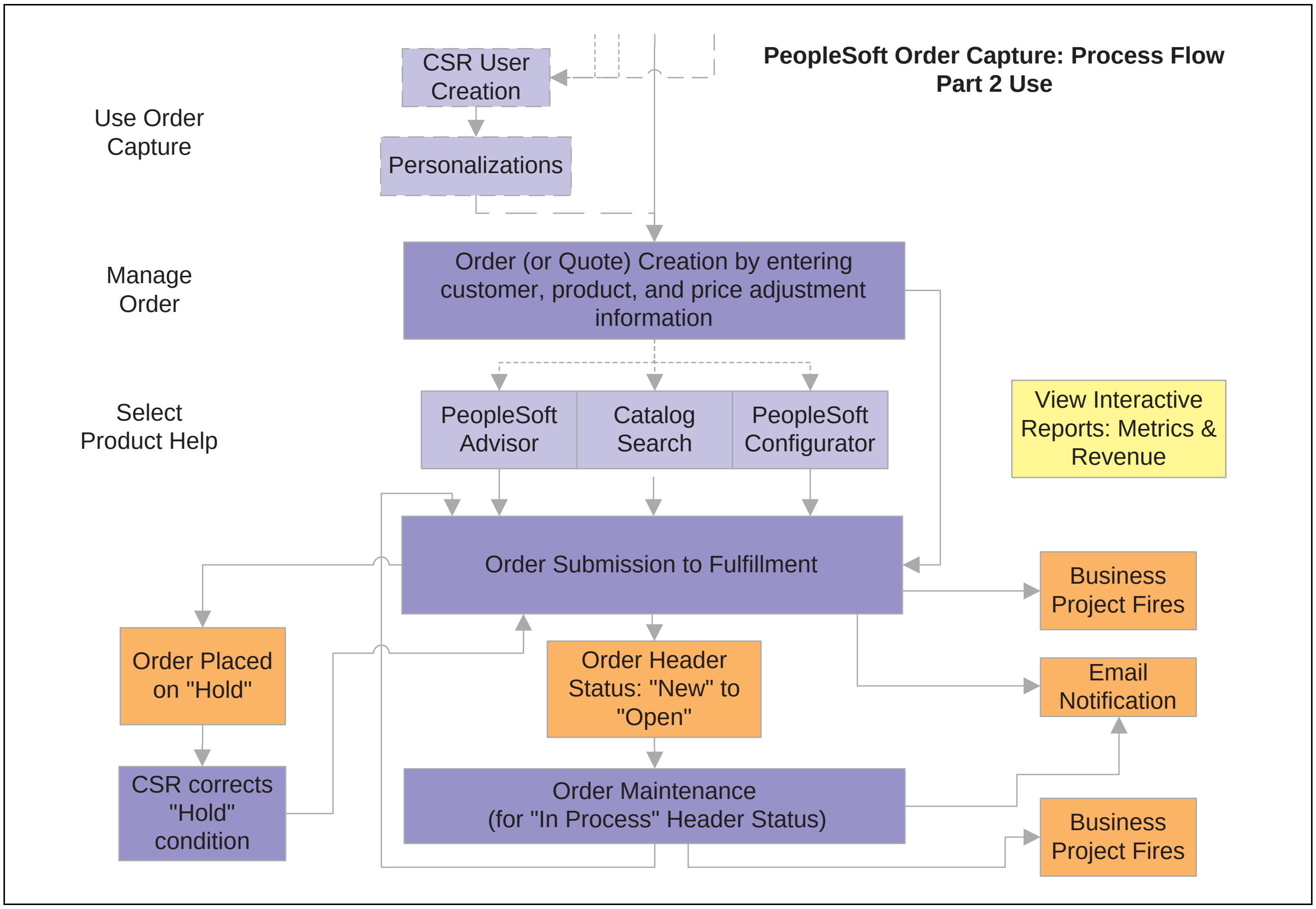
PeopleSoft Order Capture Process Flow

These diagrams illustrate the primary PeopleSoft Order Capture business processes. The diagrams identifies:

1. High-level implementation and setup tasks for which a PeopleSoft Order Capture implementer is responsible.
2. Main business processes available for use by a PeopleSoft Order Capture CSR:



PeopleSoft Order Capture process flow (setup)



PeopleSoft Order Capture process flow (use)

See Also

Chapter 3, "Setting Up PeopleSoft Order Capture," page 25

Chapter 8, "Managing Orders and Quotes," page 113

PeopleSoft Order Capture Integrations

PeopleSoft Order Capture integrates with most PeopleSoft CRM applications. Generally, this occurs in the form of other CRM applications channeling CSRs, call center agents, marketing managers, or sales representatives to the entry form where they can create an order or quote.

PeopleSoft CRM Applications

PeopleSoft Order Capture integrates directly with these PeopleSoft CRM features or applications:

- 360-Degree View.
- PeopleSoft Advanced Configurator.

  This integration enables complex configuration of products directly from the order line.
- PeopleSoft FieldService.

PeopleSoft Order Capture provides support for both service order generation and installed products.

- PeopleSoft Marketing.

  PeopleSoft Order Capture displays campaigns that are targeted to your customers.

- PeopleSoft Real-Time Advisor.

  This integration enables CSRs to launch a PeopleSoft Advisor dialog and, using a question and answer session, match a buyer with a recommendation for a product, service, or solution.

- PeopleSoft Sales.

  This integration supports the creation of a quote or order from a sales lead or opportunity.

- PeopleSoft Support.

  This integration enables call center agents to generate a sale from a case.

- PeopleSoft Telemarketing.

  This integration enables telemarketers to quickly convert a phone call opportunity into a sale.

External Applications

PeopleSoft Order Capture and Order Capture Self Service use EIPs to connect to fulfillment systems and other third-party applications. PeopleSoft CRM EIPs connect you to:

- PeopleSoft SCM or similar systems.

  This integration enables order fulfillment.

- Credit Card EIP.

  This enables integration with third-party credit card authorization and payment vendors directly from PeopleSoft Order Capture and Order Capture Self Service.

- Carriers and tax calculation systems.

  Integration with ConnectShip (for freight) and Taxware or Vertex (for taxes) enables order capture applications to calculate freight, sales tax, and VAT directly from an order.

  This table lists cross-references to third-party information:

Third-Party Application	System Type	Company URL
ConnectShip	Shipping cost calculation	http://connectship.com
Taxware	Sales and use tax calculation	http://www.taxware.com
Taxware	WorldTax	http://www.taxware.com/products/worldtax.html
Vertex	Sales and use tax calculation	http://www.vertexinc.com

Note. Supplemental information about how to set up third-party application integrations is located on the PeopleSoft Customer Connection website.

PeopleSoft Order Capture Applications Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks for your organization based on the features that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, and links to the corresponding PeopleBook documentation.

PeopleSoft Order Capture applications also provide component interfaces to help you load data from your existing system into order capture tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

This table lists all of the order capture components that have component interfaces:

Component	Component Interface	Reference
Order Capture component interfaces:		
CARRIER	CARRIER_SCI_SCI	See Chapter 3, “Setting Up PeopleSoft Order Capture,” Setting Up Freight Integration, page 62.
RO_BUS_UNIT	RO_BUS_UNIT_SCI	
RO_CATALOG	RO_CATALOG_SCI	
RO_DEFN	RO_DEFN_SCI	See Chapter 3, “Setting Up PeopleSoft Order Capture,” Setting Up PeopleSoft Order Capture Tables, page 27.
RO_DEFN_INTEGRATE	RO_DEFN_INTEGRATE_SCI	
RO_DISPLAY_TEMPL	RO_DISPLAY_TEMPL_SCI	
RO_TYPE	RO_TYPE_SCI	See Chapter 3, “Setting Up PeopleSoft Order Capture,” Defining Order and Quote Processing, page 46.
Order Capture Self-Service component interfaces:		
RB_SRTY_PRIV	RB_SRTY_PRIV_SCI	
RB_SRTY_PRIV_DELTA	RB_SRTY_PRIV_DELTA_SCI	
RB_SRTY_PRIV_DFLT	RB_SRTY_PRIV_DFLT_SCI	See <Xref to the component documentation>.
RX_GUEST_REG_TMPLT	RX_GUEST_REG_TMPLT_SCI	
RX_REP_REG_TABLE	RX_REP_REG_TABLE_SCI	
Mobile Order Capture component interface:		
MOC_OC_OPTIONS_CMP	MOC_OC_OPTIONS_CMP_SCI	

Other Sources of Information

In the planning phase of your implementation, take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, with information about where to find the most current version of each.

See Also

PeopleSoft Enterprise Setup Manager for Customer Relationship Management 8.9

Part 2

PeopleSoft Order Capture

Chapter 10
Working with Interactive Reports for PeopleSoft Order Capture

CHAPTER 2

Defining PeopleSoft Order Capture Business Units

This chapter provides overviews of PeopleSoft business units and PeopleSoft Order Capture business units and discusses how to define PeopleSoft Order Capture business units.

Understanding PeopleSoft Business Units

A business unit is an operational subset of your organization. Each business unit has its own way of storing information and has its own processing guidelines. You can use one business unit for all cases, or you can divide operations based on whatever criteria makes the most sense. For example, you can create business units for different product lines or regions. PeopleSoft Order Capture transactions use business units as key identifiers. Once you determine how many business units you need and how to organize them, define them in the PeopleSoft Order Capture system.

Note. PeopleSoft implementation personnel can help you to define your appropriate business unit structure.

Define PeopleSoft business units in this basic order:

1. Define global PeopleSoft business units, if you run multiple PeopleSoft applications.
2. Define PeopleSoft Customer Relationship Management (PeopleSoft CRM) business units.
3. Link PeopleSoft business units and PeopleSoft CRM business units to PeopleSoft Order Capture.

   Note. For example, you can create a business unit here, and connect that business unit to PeopleSoft Sales later.

Before you create multiple order capture business units, ensure that you understand tableset controls, which you use to determine values for fields on transactional pages.

Understanding PeopleSoft Order Capture Business Units

This section describes some of the essential traits of business units as applied to PeopleSoft Order Capture. This information can help you determine the best way to define business units for your implementation.

In PeopleSoft Order Capture, use order capture business units to drive the business process of creating and tracking orders that customer service representatives (CSRs), sales representatives, and self-service customers create. To implement PeopleSoft Order Capture, you must create order capture business units. These business units define processing rules to capture orders and enable the integration with other PeopleSoft applications, such as Order Management.

Note. For integration purposes, business unit definition records must be synchronized across all systems. Business unit definitions that you create in PeopleSoft CRM are available in PeopleSoft Supply Chain Management. You must make PeopleSoft Order Management and Inventory business unit definitions available to PeopleSoft CRM. To synchronize business unit records across your business enterprise, use the business unit enterprise integration point.

Defining PeopleSoft Order Capture Business Units

This section discusses how to create PeopleSoft Order Capture business units.

Note. In PeopleSoft Order Capture Self Service, you must define business unit settings on the Order Capture Definition and Self Service Options pages.

See Also

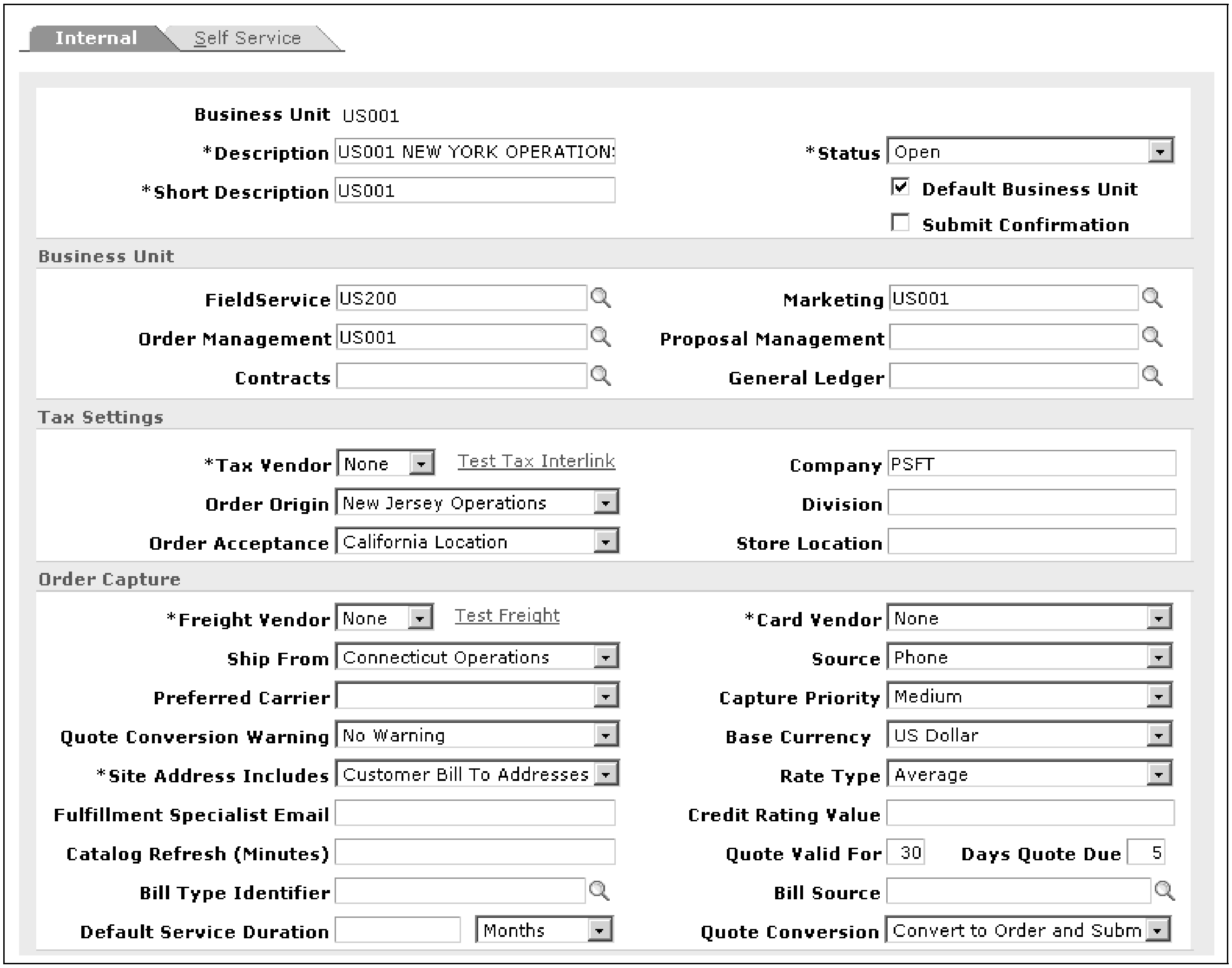
Chapter 11, “Defining PeopleSoft Order Capture Self Service Business Units,” page 173

Page Used to Define PeopleSoft Order Capture Business Units

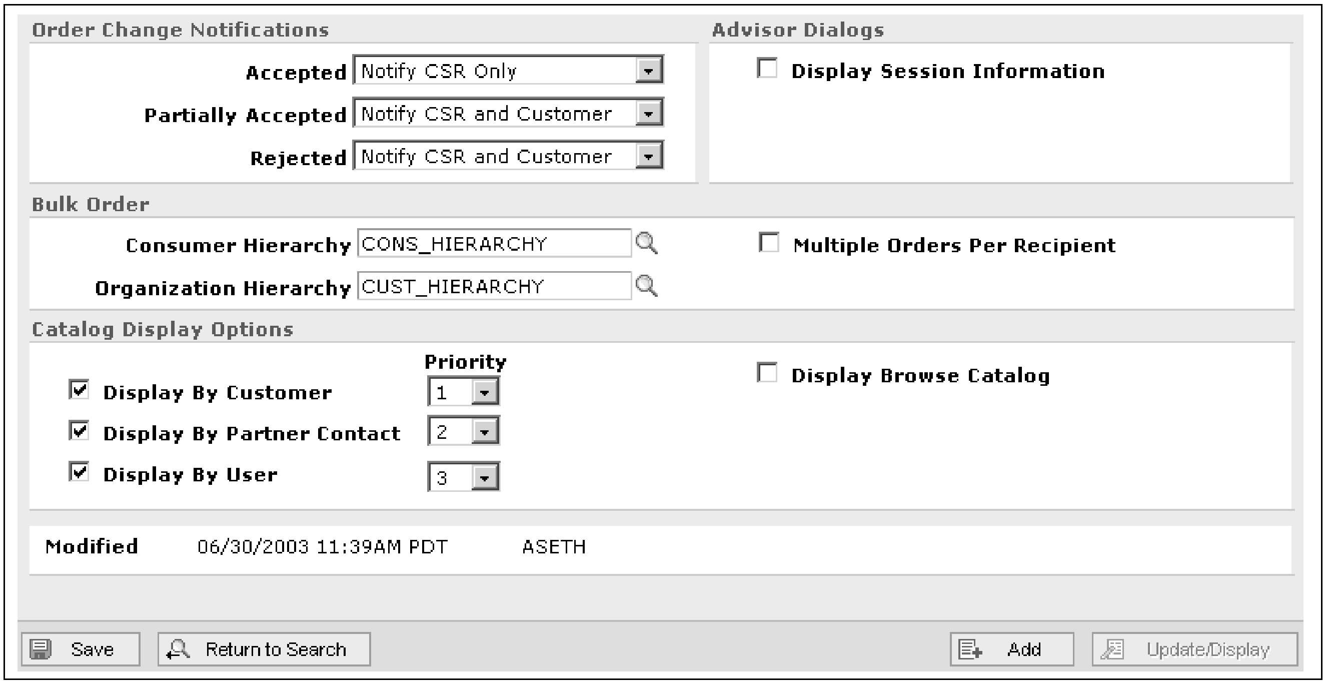
Page Name	Object Name	Navigation	Usage
Order Capture Definition	BUS_UNIT_RO1	Set Up CRM, Business Unit Related, Order Capture Definition, Business Unit, Order Capture Definition	Create PeopleSoft Order Capture business units, update existing business units, and establish default business units.

Creating PeopleSoft Order Capture Business Units

Access the Order Capture Definition page.



Order Capture Definition page: Internal tab (1 of 2)



Order Capture Definition page: Internal tab (2 of 2)

Business Unit

Displays the business unit that you entered to access the page.

Note. If your company uses more than one PeopleSoft application and defines the same business units across applications, use the same name for business units that are designed to share the same setID.

Description

Enter a description of the business unit. This description appears on the Order Capture Entry Form page and in other places where the business unit appears.

Status

Select an *Open* or *Closed* status. You cannot process transactions for a closed business unit.

Short Description

Enter a brief description of the business unit. This description appears on the Order Capture Entry Form page and in other places where the business unit appears.

Default Business Unit

Select to define this business unit as the default business unit. If no business unit is defined in User Preferences, the system uses the default business unit that you identify here.

Note. The system displays this check box only after you create a business unit.

Note. The product search and catalog search features also use the default business unit.

Default Set ID

Enter the setID that determines your preliminary tableset sharing setup. This setID determines the setIDs that the system assigns to each record group for the new business unit, and the setID that is assigned to a record group determines the tableset that provides values for the business unit. If you enter an existing setID, the system copies the set control definition of that business unit to the new business unit.

Note. The system displays this field only when you open the page in Add a New Business Unit mode. This field disappears when you create the business unit.

Submit Confirmation

Select to view a confirmation page once an order or quote has been submitted. If the submission was successful, the CSR can either return to the order or quote just submitted, or begin to create a new order or quote. If the submission was placed on hold, the CSR is able to link directly to the Holds page.

If you clear this option, the system populates the header statuses automatically, and the Submit Confirmation page does not appear.

Create BU (create business unit)

Click to establish the setID controls for the order capture business unit based on the default setID that you specify.

Note. The system displays this button only when you open the page in Add a New Business Unit mode. This field disappears when you create the business unit.

Business Unit

Field Service

Enter the PeopleSoft FieldService business unit that will map to this order capture business unit.

Note. When ordering a product that requires installation, a service order is created in this PeopleSoft FieldService business unit.

Marketing

Enter the PeopleSoft Marketing business unit that will map to this order capture business unit. PeopleSoft Order Capture displays campaign offers that are associated with this Marketing business unit.

Order Management

Enter the PeopleSoft Order Management business unit that will map to this Order Capture business unit. PeopleSoft Order Capture maps to this Order Management business unit for order fulfillment.

Proposal Management

Select the PeopleSoft Proposal Management business unit with which PeopleSoft Order Capture integrates.

Note. PeopleSoft Proposal Management is part of a suite of Enterprise Service Automation (ESA) applications, within PeopleSoft Financial Management Solutions’ product line. PeopleSoft CRM has added the ability to send PeopleSoft Proposal Management information when an engagement service product is included in a quote. This enhancement also includes the ability to receive pricing information when an engagement is fulfilled in PeopleSoft Proposal Management.

Contracts

Enter the PeopleSoft Contracts business unit that will map to this Order Capture business unit. This only applies if you wish to take advantage of the intregration from PeopleSoft Order Capture to PeopleSoft’s billing system.

General Ledger Enter the PeopleSoft General Ledger business unit that will map to this Order Capture business unit. This will allow the PeopleSoft General Ledger application to record billing information.

Note. This only applies if you wish to take advantage of the intregration between PeopleSoft Order Capture and PeopleSoft's billing system.

Tax Settings

Tax Vendor Select a tax vendor. If you select *Taxware, Vertex*, or *WorldTax*, PeopleSoft Order Capture integrates with the relevant third-party system for tax calculations. If you want value-added tax to be part of your pricing calculations during order entry, select *WorldTax.* If you select *None*, the system does not calculate taxes when creating orders or quotes.

Note. You cannot show tax on an order or quote unless you select a vendor.

Test Tax Interlink Click to verify that the tax integration is functioning correctly.

Note. Your business interlink must be properly configured prior to a test of the integration.

Company and **Division** Enter codes that Taxware and Vertex use for reporting and tax calculation purposes. Check your vendor's documentation for further information.

Order Origin Enter the business unit where sales orders originate. Taxware references this location to calculate sales taxes for local jurisdictions that use this information in their taxing practices. Check the Taxware documentation for further information.

Order Acceptance Enter the business unit where orders are accepted. Both Taxware and Vertex reference this location to calculate sales taxes. Check the Taxware or Vertex documentation for further information.

Store Location (Optional) Enter the Store Location parameter used by third party tax vendors. This is a 10–character maximum field.

Order Capture

Freight Vendor Select a freight vendor type. Values are:

None: No freight is calculated on the order.

External: Order information is passed to an external vendor such as ConnectShip, and the calculated freight amount appears on the order.

Test Freight Click this link to verify that the freight integration is functioning correctly.

Card Vendor Select a card vendor. If you select *3rd party*, the system submits credit card information to a third-party system for credit card authorization processing.

Ship From Enter a ship-from location, assuming that all products ship from this location. This information is used when calculating taxes and freight costs.

Source Enter an informational code that identifies the source of the order. For example, you could specify *Phone* if you receive most orders for this business unit by telephone.

Note. The CSR can change this field's default value.

Preferred Carrier Select the default carrier that you want to use when creating orders or quotes.

Capture Priority Select a capture priority of *Urgent*, *High*, *Medium*, or *Low* to specify the default priority for all orders that are created in the business unit. You can change the priority during order creation.

Quote Conversion Warning Unless specified on the business unit definition, a quote that is converted to an order will automatically be submitted. When a quote that contains an engagement service product is converted, the engagement service is updated in the PeopleSoft Proposal Management system. If you want to display a warning for the CSR which indicates that the quote that is about to be converted to an order contains at least one Engagement Service product, then select *Display Warning*. If you want to bypass the warning, select *No Warning*.

Base Currency Enter the default currency. A base currency is required for the business unit, even if you are not transacting in foreign currencies.

Site Address Includes Select an order capture site address. The selection here includes all existing site addresses for a customer. You can increase the number of addresses available during order entry. Values are:

- *site addresses only:* Displays site addresses only.

  Note. This is the default selection.

- *all customer addresses:* Displays the existing site addresses plus all other customer addresses.
- *customer Bill To addresses:* Displays the existing site addresses plus any billing addresses.
- *customer Ship To addresses:* Displays the existing site addresses plus any shipping addresses.

Rate Type Select the method that the system uses to set the exchange rate between currencies for PeopleSoft Order Capture transactions.

Fulfillment Specialist Email Enter an email address to which an email is sent if you create an order that contains a literature-type product.

Credit Rating Value Enter a minimum credit rating value. If the customer's credit rating is less than this amount, the order that is associated with that customer is automatically placed on hold.

Catalog Refresh (minutes) Enter the wanted catalog refresh interval amount in minutes. When you view the product catalog, the system automatically checks when the last refresh occurred. If the interval since the last refresh is greater then the time that you enter here, the system forces a refresh.

Quote Valid For

Enter the default number of days for which a quote is valid after the creation date. The system adds this number to the quote creation date to calculate the expiration date. Once the expiration date passes, the status changes to *Expired*.

Note. You cannot convert expired quotes to orders.

Days Quote Due

Enter the number of days that the system automatically adds to the quote creation date to indicate a final date by which a quote should be converted to an order. A quote's due date is then set to the resulting date. For example, if you want quotes to elapse 30 days after creation, enter *30* here.

Note. The number that you define here does not appear on the quote itself.

Bill Type Identifier

Select the bill type that you want associated with the setID. The bill type prompts on all bill type identifier codes that are synchronized from PeopleSoft Billing. The bill type identifier is a user-defined value in PeopleSoft Billing. PeopleSoft Order Capture delivers CRM _ORDER as sample data.

Note. On the Billing and Pricing Options page, the Bill Type field is optional. If it is not defined in PeopleSoft CRM, the billing plan in PeopleSoft Contracts sets the field based on the PeopleSoft Contracts business unit.

Bill Source

Select the bill source that you want associated with the setID.The bill source prompts on all bill source identifier codes that are synchronized from PeopleSoft Billing. The bill source code is a user-defined value in PeopleSoft Billing. PeopleSoft Order Capture delivers CRM _ORDER as sample data.

Note. On the Billing and Pricing Options page, the Bill Source field is optional. If it is not defined in PeopleSoft CRM, the billing plan in PeopleSoft Contracts sets the field based on the PeopleSoft Contracts business unit.

Default Service Duration

For a service, we specify a start date and an end date on an order. The end date is calculated by adding the duration to the start date. If you have not specified a duration on the product definition, the order will pick up the duration from this field. Duration is the numeric value plus the quantifier, which is either *days, months, quarters, weeks,* or *years.*

Quote Conversion

Select *Convert to Order Only* if you want to give the CSR the chance to modify an order prior to submission. Select *Convert to Order and Submit* if you want quotes that are converted to orders to automatically be submitted. This is the default selection.

Note. Your selection here will apply to all orders placed from this business unit.

Order Change Notifications

The system can send order change notifications to specified parties when order maintenance occurs, and PeopleSoft Order Capture receives a message from the fulfillment system.

Accepted, Partially Accepted, and **Rejected**

Select the recipients that you want PeopleSoft Order Capture to notify when the fulfillment system informs PeopleSoft CRM that order changes have been fully accepted, partially accepted, or rejected. Values are:

- *Notify CSR Only.*
- *Notify CSR and Customer.*
- *Notify Customer Only.*
- *Notify Nobody.*

Advisor Dialogs

Display Session Information Select to display the Advisor Dialog Session information when a dialog is accessed from Internal Order Capture. If not selected, the Advisor Dialog Session information will not appear when a dialog is accessed.

Bulk Order

On the Order Capture Definition page you will plug in relationship views for both consumers and organizations. Your master order/recipient order relationships are determined by the relationships you have established in the Relationship Viewer. Therefore, you must first define your relationship views in Set Up CRM, Common Definitions, Customer, Configure Relationship Views.

Consumer Hierarchy Select a relationship view for a single consumer, or contact. This will determine all of the possible bulk order recipients at runtime by automatically populating all of the child relationships for the parent chosen here.

Multiple Orders Per Recipient Select this check box if you want to allow single recipients to receive more than one order. An Order field appears on the runtime page, allowing you to enter the number of orders you want to specify per recipient.

Organization Hierarchy Select a relationship view for the company, or organization. When the end user enters a company name, it will prompt against the table you select here to determine the child relationships available.

Catalog Display Options

The system can send order change notifications to specified parties when order maintenance occurs, and PeopleSoft Order Capture receives a message from the fulfillment system.

Display Browse Catalog Select this check box to display the browse catalog along with the search tree hierarchy while searching in PeopleSoft Order Capture.

Display Catalogs By User, Display Catalogs By Customer, and **Display Catalogs By Partner** Select the checkbox to indicate if catalogs should be displayed by User, by Customer or by Partner

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Note. When catalogs are displayed from the order, the list of authorized catalogs can vary depending on the selected partner, customer, and user logged in.

When a partner or customer is not selected on the order, the list of authorized catalogs will depend strictly on the user logged in. In that case, only catalogs that the user is specifically authorized for will be available.

Priority Select the priority to determine which catalog is displayed. The priority indicates which catalog takes precedince if more than one mode qualifies.

CHAPTER 3

Setting Up PeopleSoft Order Capture

This chapter provides overviews of PeopleSoft Order Capture setup, toolbar configuration, and application class set creation; lists common elements; and discusses how to:

- Set up PeopleSoft Order Capture tables.
- Define order and quote processing.
- Define integrations and mappings.
- Set up credit card integration.
- Set up freight integration.
- Define tax installation options.

Understanding PeopleSoft Order Capture Setup

PeopleSoft Order Capture is configurable and supports industry solutions without a need to modify application logic. This is achieved through configuration of the order capture entry forms and order capture business processing logic. Order maintenance functionality, in particular, requires configuration capabilities to enable you to determine the states at which an order capture is eligible for maintenance (change or cancelation).

Consequently, the majority of PeopleSoft Order Capture setup is consolidated into three individual workbenches:

- Setup
- Capture Type
- Integration

After you define toolbar preferences, create application class sets, and set up third-party integrations, you can perform all of your remaining setup tasks here as well.

The three workbenches bring together most setup elements. Together, they allow for robust configuration of the capture forms and the business logic. You can configure workbenches by capture type, such as order, quote, service management, and so forth. For example, capture types can take on different forms and different business processing logic.

You can configure and control order maintenance activities by capture status, at both the header and the line levels. Aesthetics are also controlled here, as you configure presentation and labeling of capture forms by type, as well.

Note. Although these workbenches essentially combine both mandatory and optional steps, it is not *required* that you perform any setup steps if you apply the delivered system data. This system data prepopulates all of the workbench pages, and the values comprise all of the workbench settings that are necessary to get your PeopleSoft Order Capture system up and running.

Understanding Toolbar Configuration

You can configure the toolbar that you use for order and quote processing as well as the subtabs and page labels that appear on the order entry forms. The toolbar feature offers users a simple way to navigate from the component page that they are currently on to different page sections within the same component. You can set up the toolbar so that, in an order form, users can jump from one area to another—such as from Billing on the Order Entry form to Interaction History on the History page—simply by selecting the relevant name.

This table summarizes toolbar configuration features:

Feature	Description
Toolbar buttons	Toolbar buttons include PeopleTools actions and PeopleSoft Order Capture specific actions. Buttons such as Save, Refresh, Add, Next in List, Previous in List, Return to Search, and Update/Display map to corresponding buttons in PeopleTools. PeopleSoft Order Capture buttons perform application-specific actions, such as cloning an order.
Page subtabs	Page subtabs are links that appear on a component page above the toolbar. Each subtab links to sections of a page that are defined based on a page's group boxes. In PeopleSoft Order Capture, you can use page subtabs to provide users with quick access to different page sections and to control the availability of information on a page.
Toolbar configuration	You can choose which toolbar elements to display and arrange them in any sequence. You can also modify the definitions of the delivered toolbar buttons or use application classes to create new buttons.
Personalization by end user	PeopleSoft Order Capture users, such as customer service representatives (CSRs), can personalize the toolbar by selecting which buttons appear on it. Personalized configurations are associated with user IDs and do not affect the base toolbar definition. As an administrator, during setup, you decide whether users can personalize toolbars and specify the buttons in the toolbar that these users can hide in the personalization process.

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, "Configuring Toolbars"

Understanding Application Class Set Creation

PeopleSoft Order Capture uses the application class registry to store references to processing logic for PeopleSoft Order Capture. Existing PeopleSoft Order Capture application classes handle processing for the main order and quote classes, as well as industry-specific extensions.

To register, or create, classes, you must enter the full class path into the application class registry. Once the system stores this information, you can dynamically instantiate the class through PeopleCode. The registry enables you to create subclasses of the main class and substitute your classes for the main class. PeopleSoft Order Capture uses this registry to dynamically invoke the logic that is required for each capture type. PeopleSoft Customer Relationship Management (PeopleSoft CRM) industry-specific applications invoke different logic from PeopleSoft Order Capture. You can create and register your own classes without modifying the delivered extensions.

Common Elements Used in This Chapter

Click to clone a workbench page to a different setID.

Click to proceed to the next item in the list.

Click to return to the previous item in the list.

Click to return to the main page.

Setting Up PeopleSoft Order Capture Tables

The Setup Workbench enables users to view a summary of all of the setup tables that are required for PeopleSoft Order Capture.

This section provides an overview of multichannel framework (MCF) types, lists common elements, and discusses how to:

- Access PeopleSoft Order Capture setup tables.
- Define charge frequencies.
- Define charge types.
- Create data event handlers.
- Define hold codes.
- Define hold denial codes.
- Create dynamic events.
- Define header statuses.

- Create line actions.
- Create line status types.
- Create line statuses.
- Create line statuses dropdowns.
- Define MCF types.
- Define note origins.
- Define note types.
- Create note visibility.
- Define priorities.
- Define source codes.
- Define mapping frequencies.

Understanding MCF Types

PeopleSoft Order Capture enables you to send communication to customers from within the application. Order Capture can also send communications automatically when an order or quote is submitted or maintained. To do this, you must define correspondence templates and packages in advance. PeopleSoft delivers sample Order Confirmation, Quote Confirmation, and Order Maintenance templates and packages out of the box.

Specific PeopleSoft Order Capture MCF templates are marked for use with print correspondence, email correspondence, or both. Use these templates to generate email or print notifications from key transactions, such as an order or quote.

Note. PeopleSoft Order Capture templates comprise both static text and tokens. Tokens represent key data (product ID, price, order ID, and so on) from the PeopleSoft Order Capture system.

PeopleSoft Order Capture delivers these sample MCF templates for major transactions:

- Order Confirmation.
- Quote Confirmation.
- Order Maintenance.
- Order Status.

  Note. This correspondence package is used only when automatically responding to a structured email that was sent from an external source.

- Order Status Failed.

  Note. This correspondence package is used only when responding to an invalid structured email request.

You can define additional MCF types for PeopleSoft Order Capture on the MCF Types (multichannel framework types) page.

Common Elements Used in This Section

Application Class ID Enter the PeopleTools application class ID that is stored in the PSAPPCLASSDEFN table.

Package Tree Viewer Click to access the Application Packages Lookup page and select an application class. The system populates the Application Class ID and Application Class Path fields according to the class that you select.

Note. This is the highest-level package that contains this class. You can retrieve values through the Application Package Designer.

Pages Used to Set Up PeopleSoft Order Capture Tables

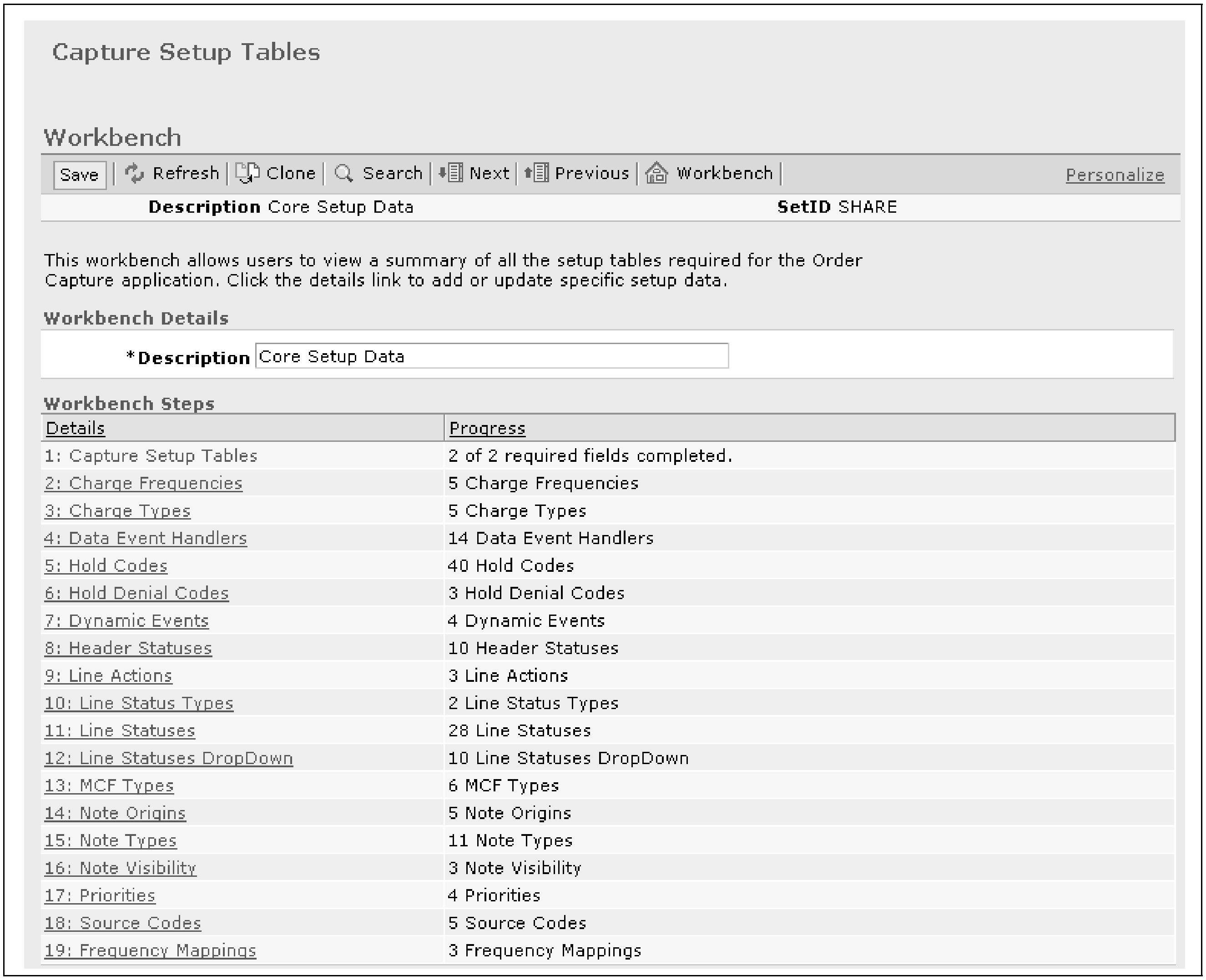
Page Name	Object Name	Navigation	Usage
Capture Setup Tables	RO_DEFN	Set Up CRM, Product Related, Order Capture, Setup Workbench, Capture Setup Tables	Access PeopleSoft Order Capture setup tables.
Charge Frequencies	RO_DEFN_CHGFREQ	Click the Charge Frequencies link on the Capture Setup Tables page.	Define charge frequencies.
Charge Types	RO_DEFN_CHGTYPE	Click the Charge Types link on the Capture Setup Tables page.	Define charge types.
Data Event Handlers	RO_DEFN_DATAELM	Click the Data Event Handlers link on the Capture Setup Tables page.	Create data event handlers. Here you define application class references that are dynamically called for the purpose of auditing system and user actions. These references also control the processing for order maintenance.
Hold Codes	RO_DEFN_HOLD	Click the Hold Codes link on the Capture Setup Tables page.	Define hold codes.
Hold Denial Codes	RO_DEFN_HLD_DEN	Click the Hold Denial Codes link on the Capture Setup Tables page.	Define hold denial codes.
Dynamic Events	RO_DEFN_DYEVENT	Click the Dynamic Events link on the Capture Setup Tables page.	Create dynamic events. Define application class references that are dynamically called for the purpose of providing plug-and-play processing during component processing.

Page Name	Object Name	Navigation	Usage
Header Statuses	RO_DEFN_HDSTAT	Click the Header Statuses link on the Capture Setup Tables page.	Define header statuses that correspond with your business process.
Line Actions	RO_DEFN_LNACTN	Click the Line Actions link on the Capture Setup Tables page.	Create line actions such as Add, Remove, and Suspend. Capture type lines use these actions.
Line Status Types	RO_DEFN_LS_TYPE	Set Up CRM, Product Related, Order Capture, Setup Workbench, Capture Setup Tables Click the Line Status Types link on the Capture Setup Tables page.	View or edit engagement service line status types.
Line Statuses	RO_DEFN_LNSTAT	Click the Line Statuses link on the Capture Setup Tables page.	Create line statuses that correspond with your business processes.
Line Status DropDowns	RO_DEFN_LNPRMPT	Set Up CRM, Product Related, Order Capture, Setup Workbench, Capture Setup Tables Click the Line Status DropDowns link on the Capture Setup Tables page.	Control or view the dropdowns available for your engagement service products.
MCF Types	RO_DEFN_MCFTYPE	Click the MCF Types link on the Capture Setup Tables page.	Define MCF types, such as print or email.
Note Origins	RO_DEFN_NOTORIG	Click the Note Origins link on the Capture Setup Tables page.	Define note origins.
Note Types	RO_DEFN_NOTTYPE	Click the Note Types link on the Capture Setup Tables page.	Define note types.
Note Visibility	RO_DEFN_NOTVSBL	Click the Note Visibility link on the Capture Setup Tables page.	Create note visibility.
Priorities	RO_DEFN_PRIORTY	Click the Priorities link on the Capture Setup Tables page.	Define priorities for orders.
Source Codes	RO_DEFN_SOURCE	Click the Source Codes link on the Capture Setup Tables page.	Define source codes—such as phone, web, and fax—for inbound capture requests.
Frequency Mappings	RO_DEFN_SCHDMAP	Click the Frequency Mappings link on the Capture Setup Tables page.	Map recurring price frequency in PeopleSoft CRM to a schedule in PeopleSoft Contracts.

Accessing PeopleSoft Order Capture Setup Tables

To define access PeopleSoft Order Capture setup tables, use the Capture Setup Tables (RO_DEFN_GBL) component.

Access the Capture Setup Tables page.



Capture Setup Tables page

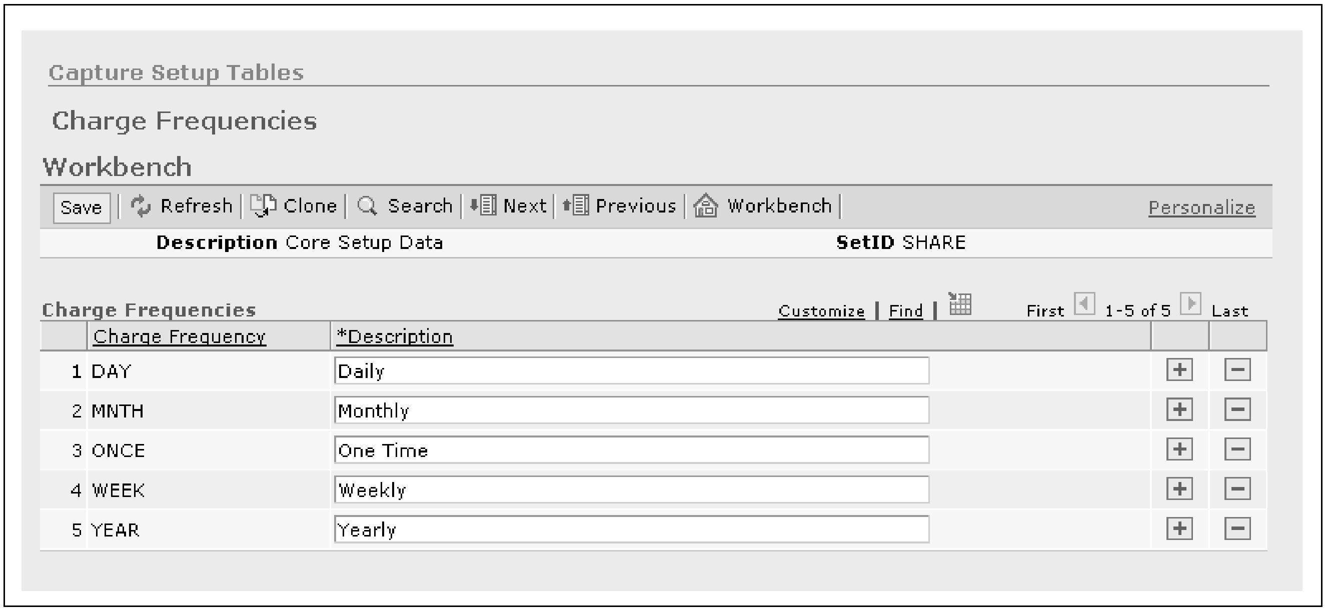
Note. A user must enter a setID in order to view this page in Add mode.

Details Click the link in the Details column to view, create, or modify values for each PeopleSoft Order Capture setup table.

Progress In the Progress column, the system displays the number of rows of data defined for each of the steps listed in the details column.

Defining Charge Frequencies

Access the Charge Frequencies page.



Charge Frequencies page

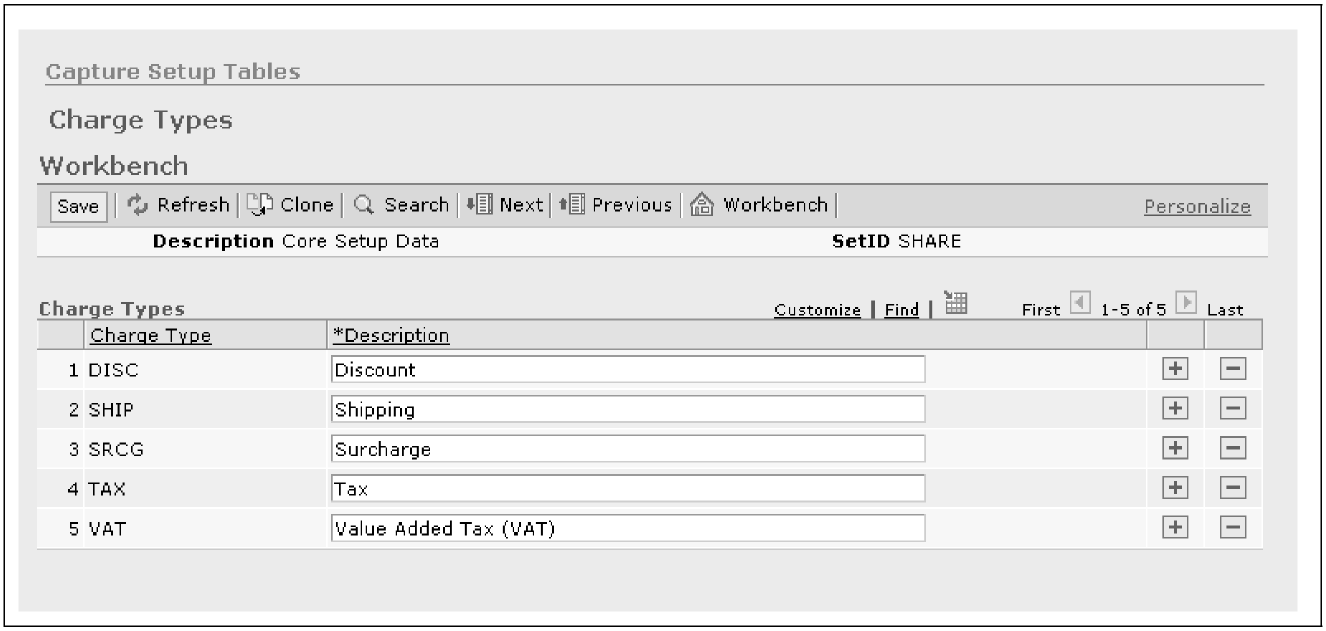
Charge frequencies are defined per product, and they represent the frequency of a recurring charge. In PeopleSoft Order Capture, these frequencies appear on the order entry form in the Totals section.

Note. If you define a recurring price and charge frequency for a product in a price list or in the product model, then that frequency and recurring price also appear in the Totals section of the order entry form.

Charge Frequency	Displays the code for the frequency of the recurring charge.
Description	Displays the description of the recurring charge’s frequency. This field is visible to the end user.

Defining Charge Types

Access the Charge Types page.



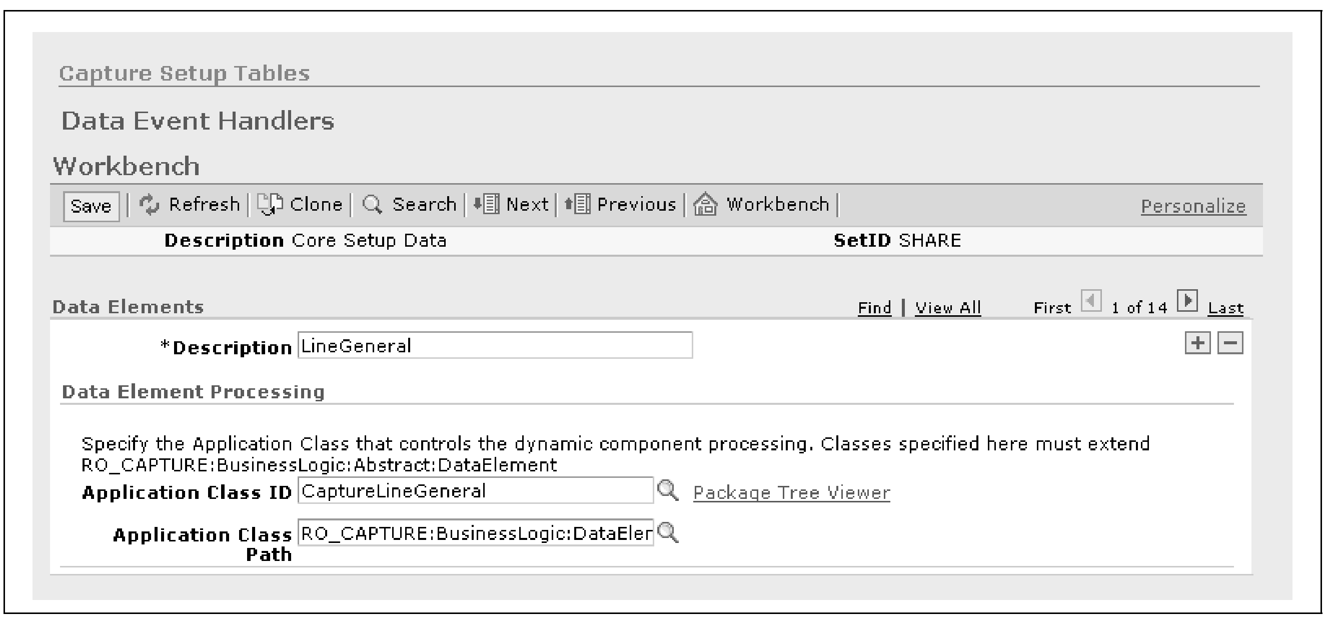
Charge Types page

In PeopleSoft Order Capture, charge types appear in the Totals section of the order entry form. Charge types are additional charges or discounts (such as shipping and taxes) that are applied to the order.

Charge Type	Displays the system code for the charge type.
Description	Displays the description of the charge type. This field is visible to the user.

Creating Data Event Handlers

Access the Data Event Handlers page.



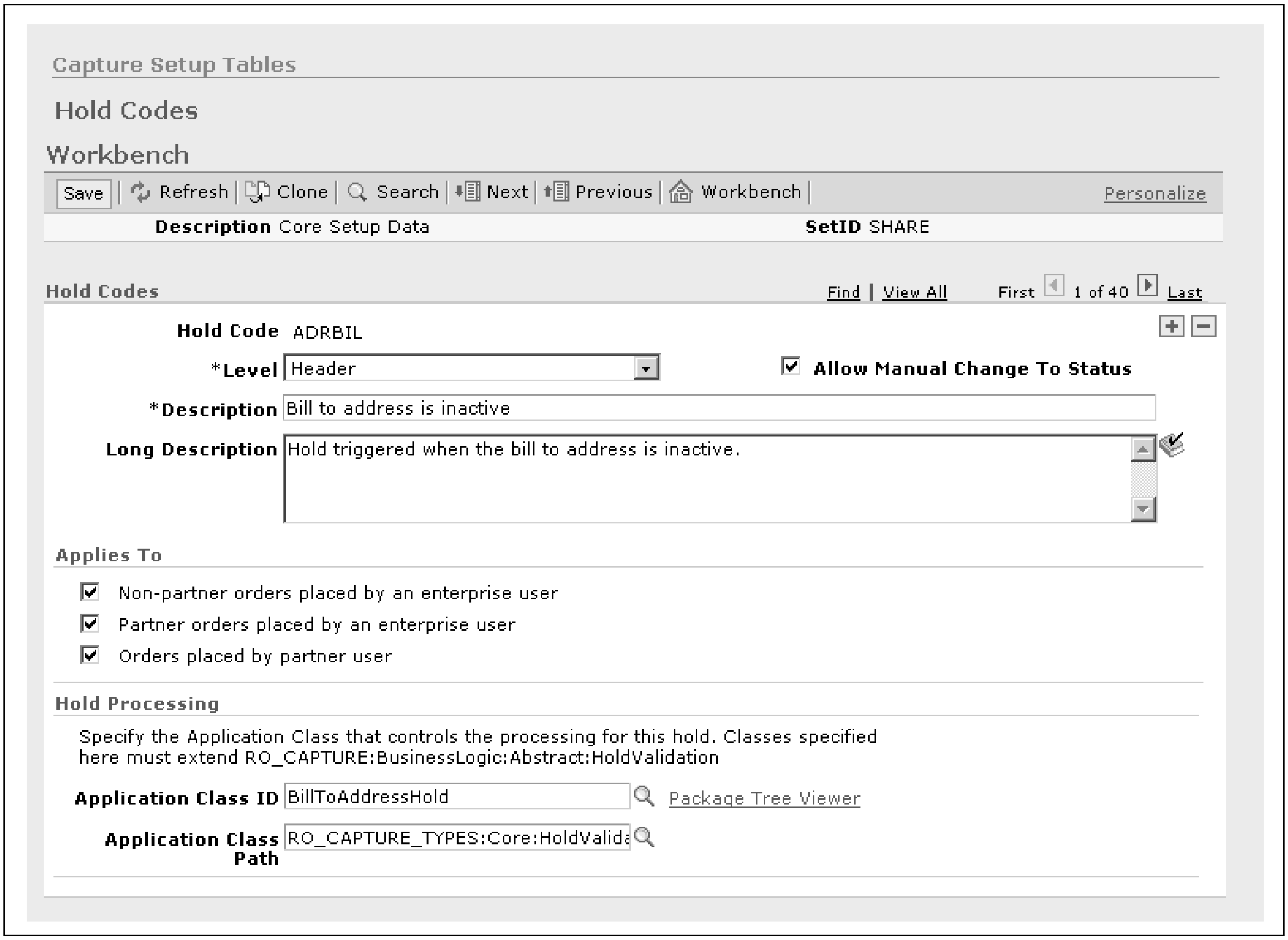
Data Event Handlers page

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Using Application Classes”

Defining Hold Codes

Access the Hold Codes page.



Hold Codes page

Set up hold codes to create hold logic that fires when you submit a specific capture type for processing. These codes are created as extensions of a base hold validation class so that they are dynamically created and carried out. You can add configurable hold logic here without additional system configuration.

Add a new class in the RO_CAPTURE_TYPES application package for each hold code that you add. The new class performs the hold validation.

Hold Codes

Hold Code	Displays a unique code identifier.
Level	Select the level of the capture data for which this hold will be triggered. This determines the type of data that is passed to the hold check. If you select *Header,* the system evaluates header-level holds once per capture. If you select *Line,* the system evaluates line-level holds once per capture line.

Allow Manual Change To Status

Select to enable a user to manually change the status of (or remove) this hold when it is triggered. If the hold is absolutely required in this condition, clear this check box. For example, if a billing customer is not specified on an order, a CSR should not be permitted to simply remove this hold; the CSR should perform a corrective action to remove the hold. In this example, the CSR must return to the order and specify a bill-to customer.

Applies To

Holds can be defined differently for the enterprise user (usually CSR), and the partner user. Holds can also be different where the order is placed on behalf of a partner. You can select any combination of the three offereings.

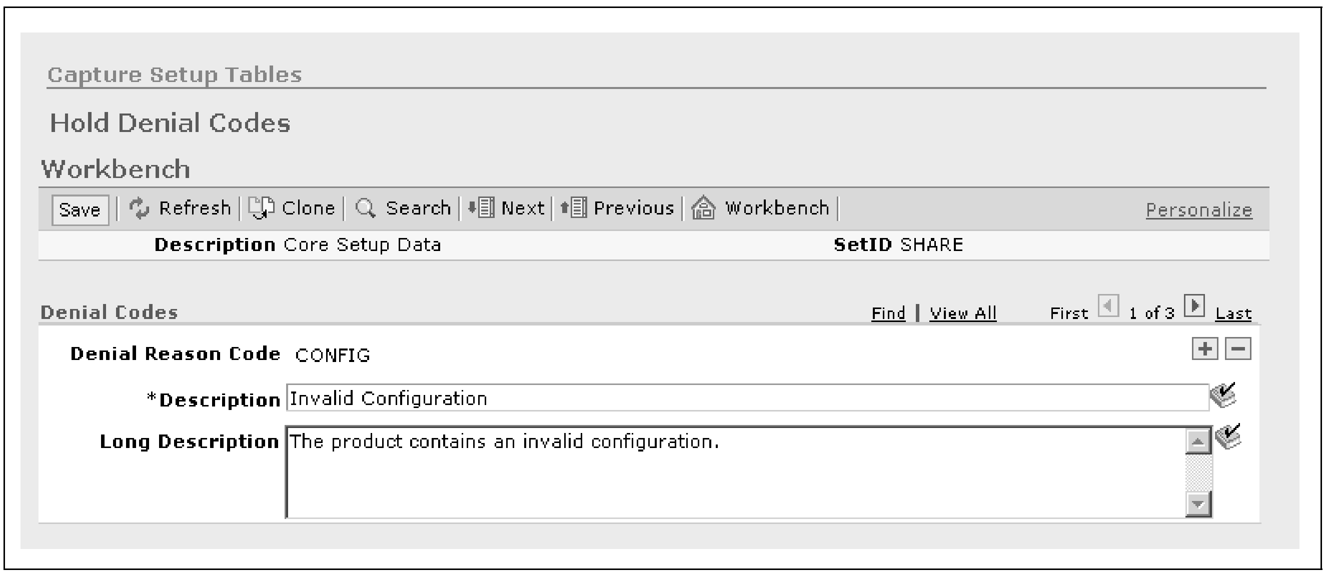
Select *Non-partner orders placed by an enterprise user* if you want to apply thedefined holds to regular orders placed by a CSR or non-partner orders. Select *Partner orders placed by an enterprise user* if you want to apply the holds to orders entered on behalf of a partner. Select *Orders placed by partner user* to apply the holds to orders submitted by partners.

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Using Application Classes”

Defining Hold Denial Codes

Access the Hold Denial Codes page.



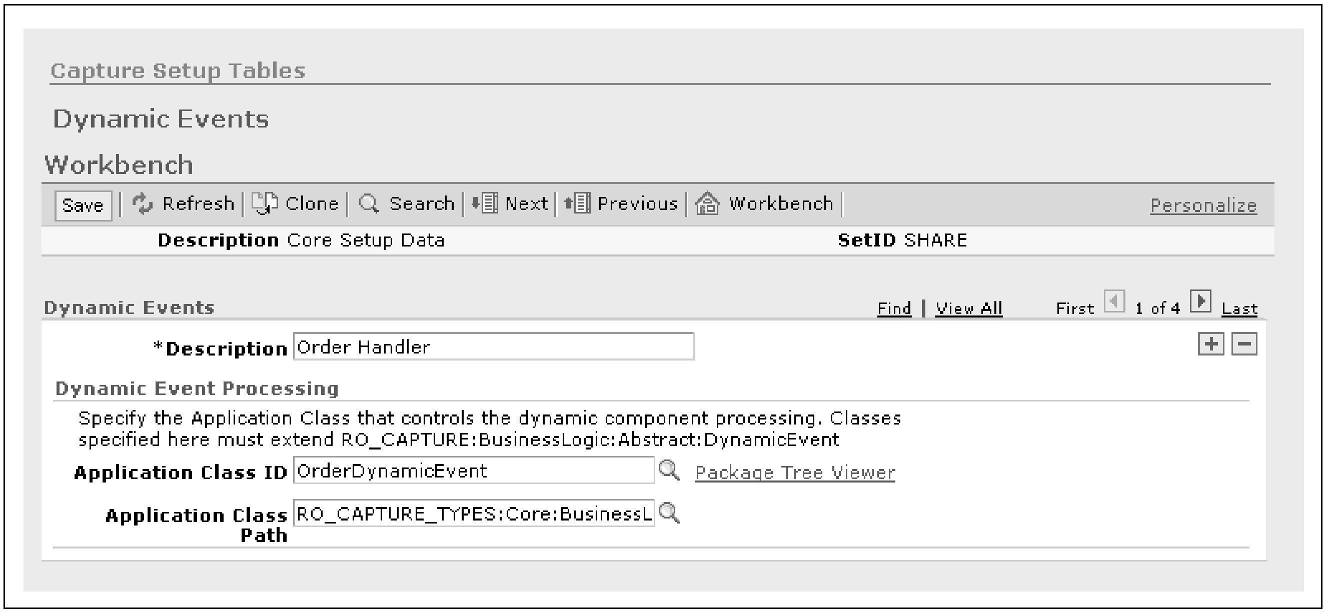
Hold Denial Codes page

An enterprise may want to reject holds on orders placed by or for a partner. Define those hold denial codes on this page, and they will be available during order entry.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Setting Up PeopleSoft Customer Relationship Management Security and User Preferences”.

Creating Dynamic Events

Access the Dynamic Events page.



Dynamic Events page

Dynamic events are application classes that are loaded during the component lifecycle. When you load the component, enter data, and save, the system loads these events and, based upon methods in these classes, carries out certain logic.

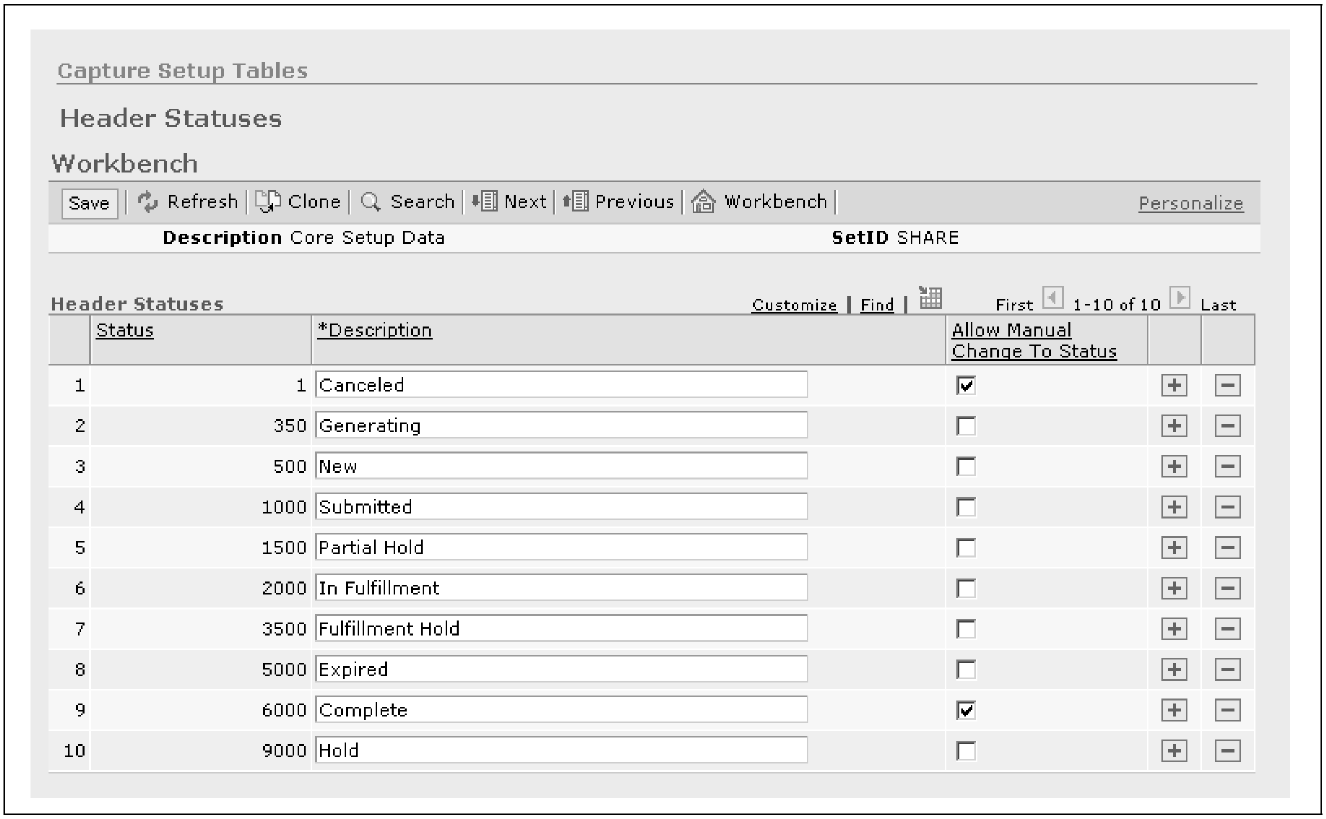
Note. You can use these classes to plug in new logic without configuring the existing application.

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Using Application Classes”

Defining Header Statuses

Access the Header Statuses page.



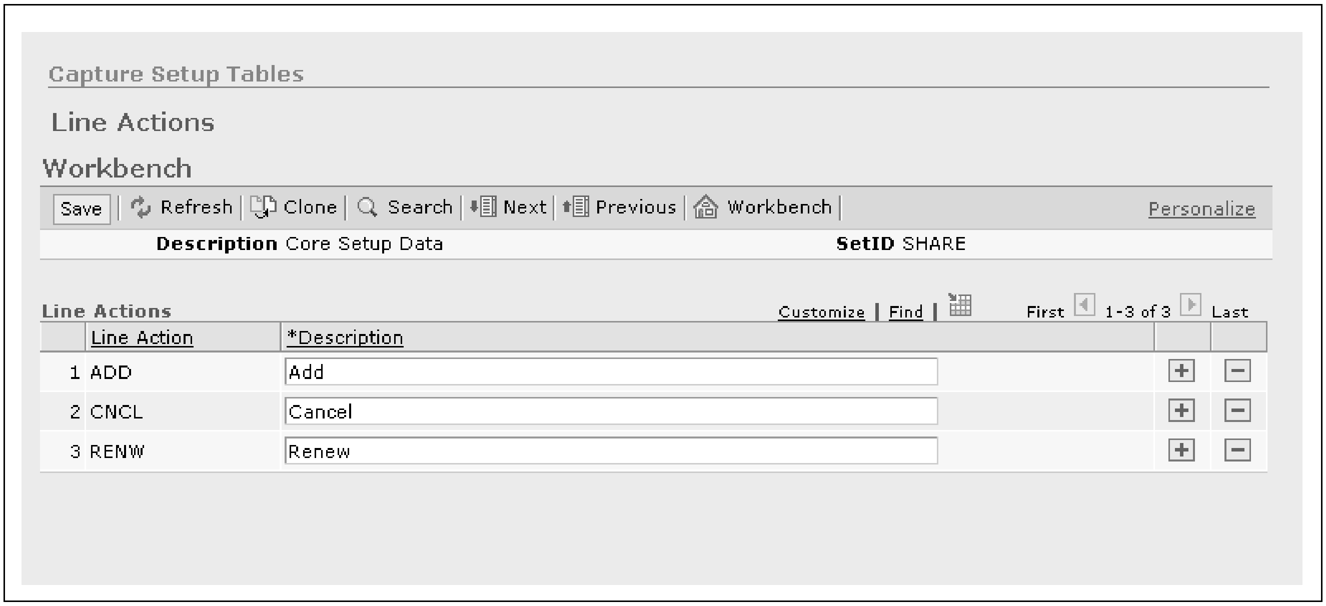
Header Statuses page

Status	Displays the status code identifier for the header status.
Description	Displays the description of the header status. This description is visible to CSRs and self-service users.
Allow Manual Change To Status	Select to enable the CSR to make a manual change to this status during order entry.

Note. Since a quote has an expiration date, a batch job examines the quote expiration dates and assigns any expired quotes a new header status of *Expired*, or whatever you choose to call it here. This action also triggers an EIP to update any associated proposals in the PeopleSoft Proposal Management system to *Canceled.* The exception to this rule is, that if any other quote that is not expired has a reference to the same proposal ID, it will not be cancelled in PeopleSoft Proposal Management. If an *Expired* quote is revised, the line status for the engagement status will be reset to *Draft*and an EIP is automatically sent to PeopleSoft Proposal Management.

Creating Line Actions

Access the Line Actions page.



Line Actions page

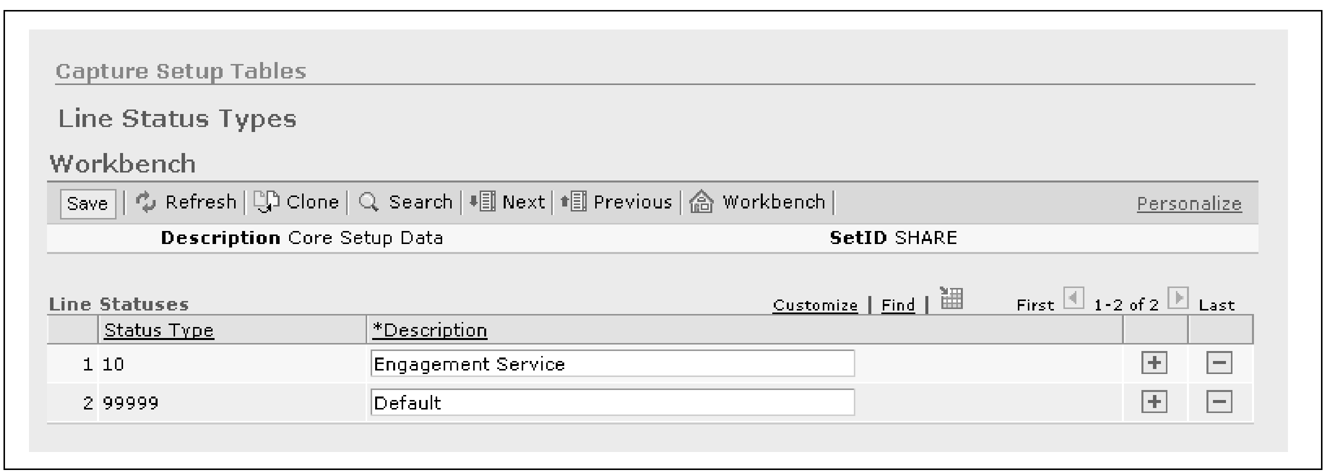
Primarily, use line actions to help manage service management transactions.

Line Action Displays the system code identifier for the line action.

Description Displays the description for the line action. This description is visible to the CSR.

Creating Line Status Types

Access the Line Status Types page.



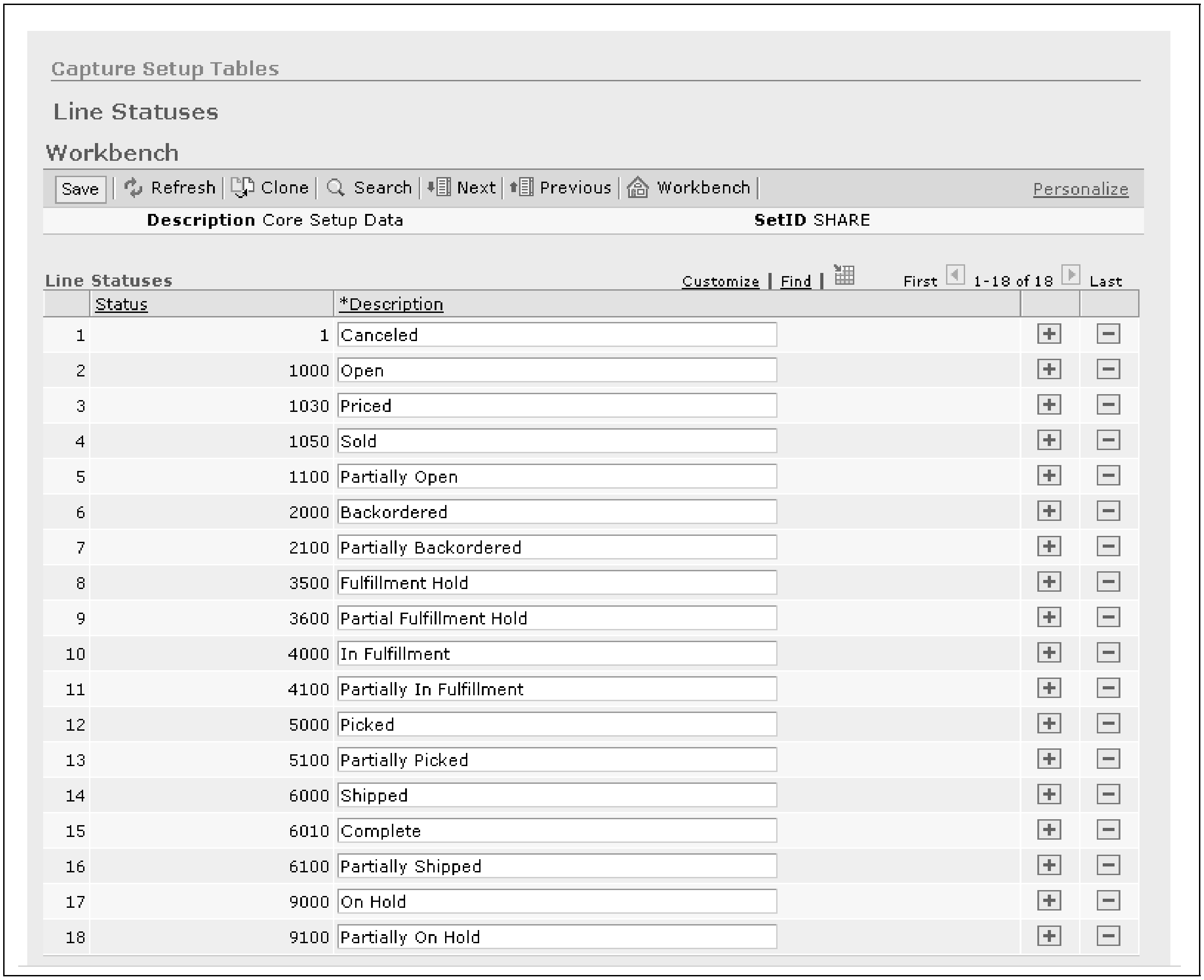
Line Status Types page

Line Statuses

The values displayed in the dropdown for the quote lines will depend on the line status. This page defines those status types. The *Engagement Service* line status type is used for engagement services products, whereas the *Default* line status type is used for any product that is not flagged as an engagement service product.

Creating Line Statuses

Access the Line Statuses page.



Line Statuses page

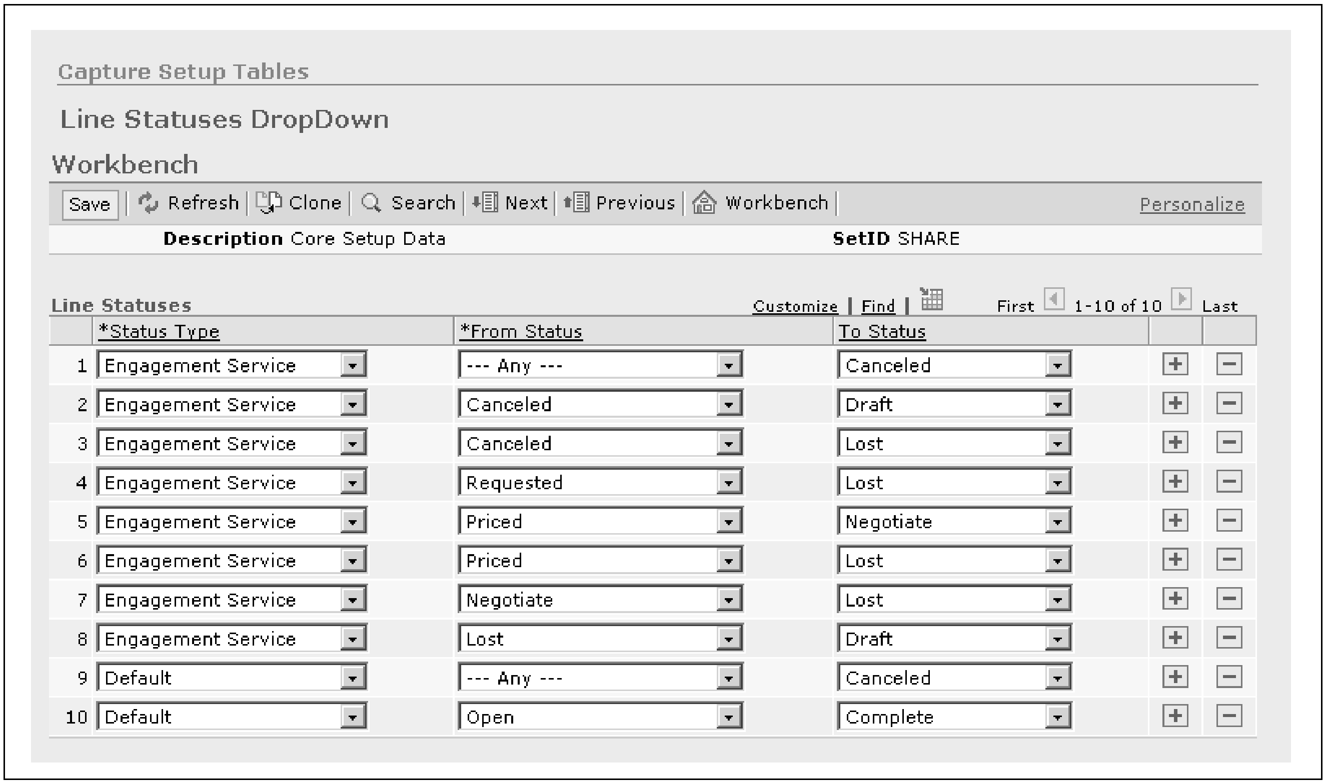
Line Statuses

Status	Displays the unique numeric code identifier for the line status.
Description	Displays the description for the line status. This description is visible to the CSR.

Note. There are six new line statuses specifically designed for engagement services. These line statuses appear on the Entry Form page, and they map to corresponding statuses in PeopleSoft Proposal Management. You can edit the names of these statuses on this page.

Defining Line Statuses Drop Downs

Access the Line Statuses DropDown page.



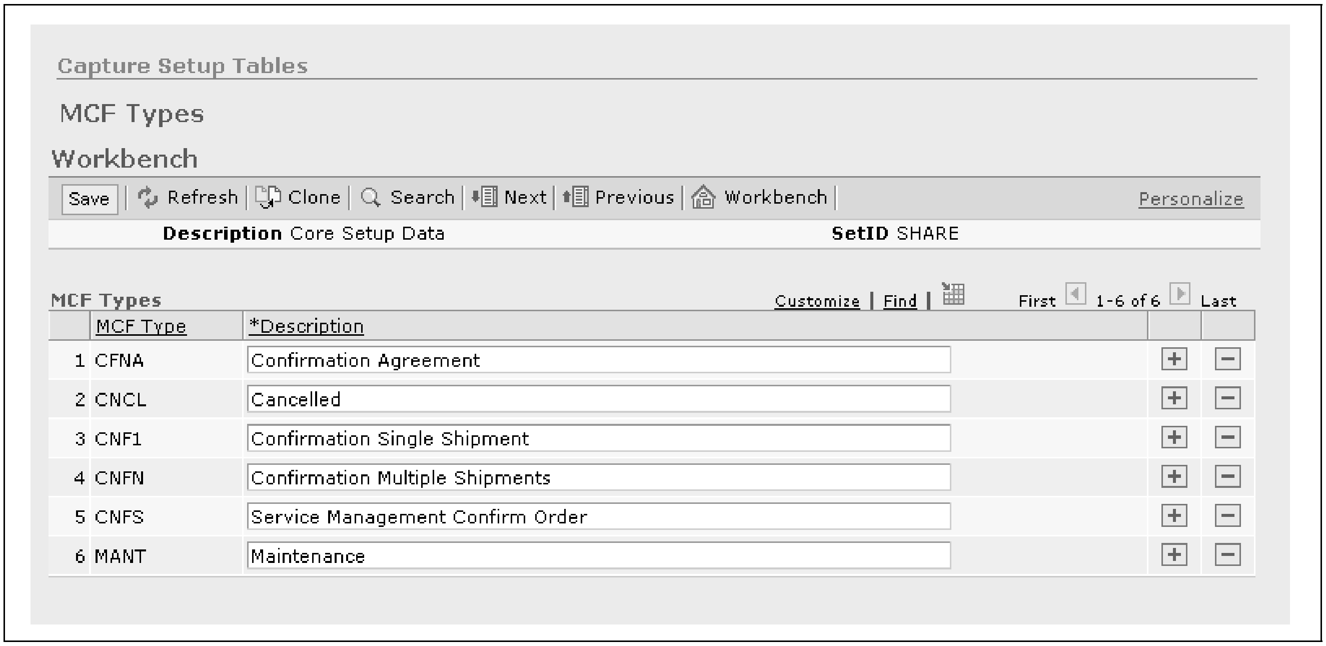
Line Statuses DropDowns page

What you define as your available status types on the Line Statuses page determines what you see on this page. Since we deliver *Engagement Service* and *Default*, you can specify alternative status dropdowns for each of these two types.

PeopleSoft Order Capture uses data defined on this page to create the line status drop downs on orders and uses the current line status to determine which statuses should be available in the drop downs.

Defining MCF Types

Access the MCF Types page.

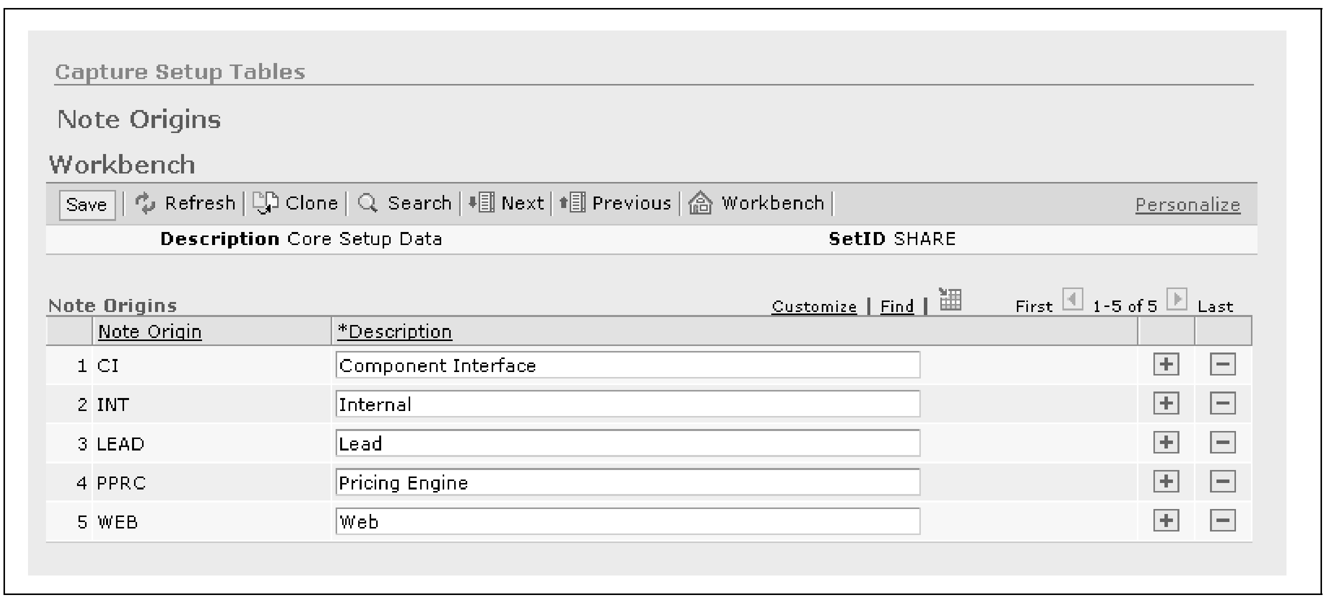


MCF Types page

MCF Type Displays a unique identifier for the MCF type of correspondence.

Defining Note Origins

Access the Note Origins page.



Note Origins page

Note origins (descriptions) appear on the Notes tab of the order entry form. This note origin (description) is display-only and indicates the source of the note, such as *Internal* or *Web.*

Note Origin Displays the system code identifier for the note origin.

Description Displays the description for the note origin. This description is visible to the CSR.

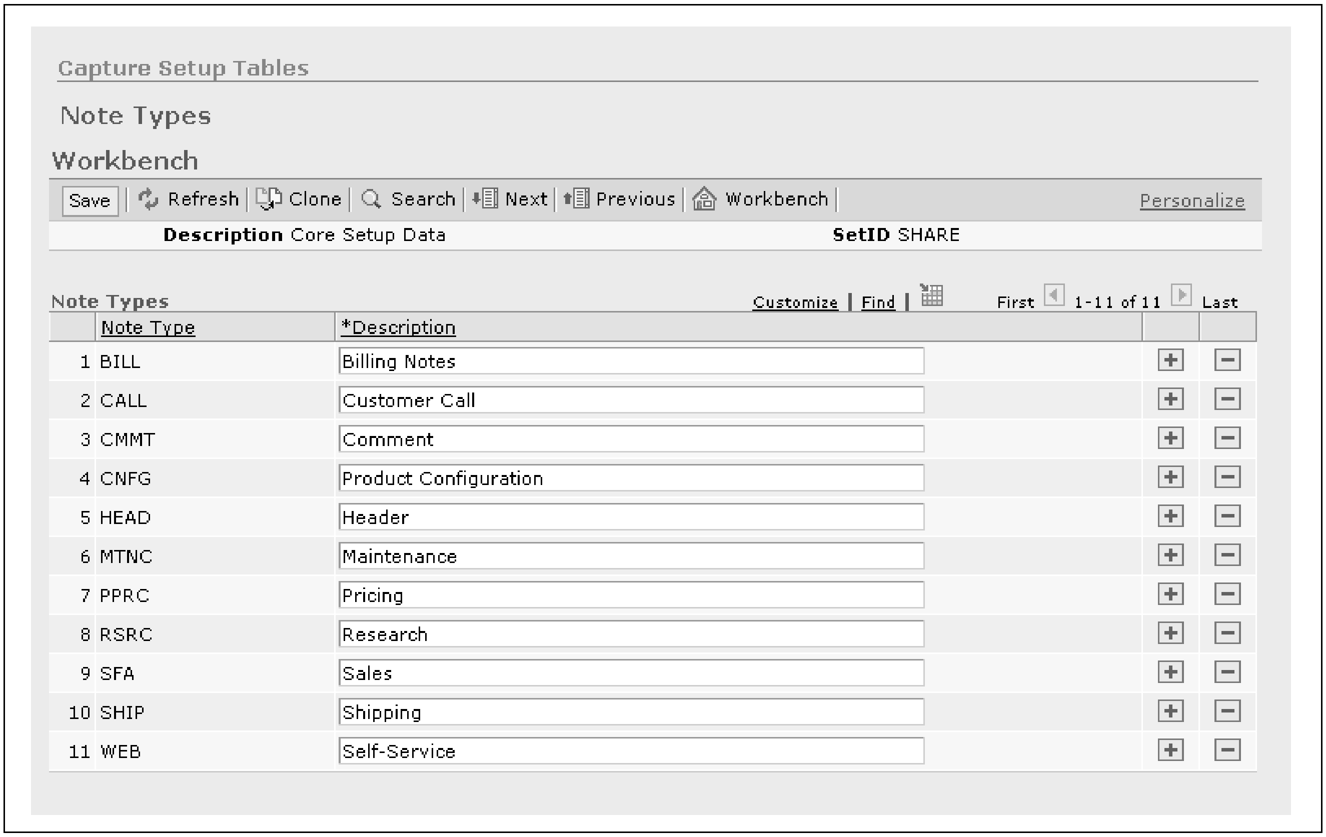
See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Working with Notes and Attachments”

Chapter 8, “Managing Orders and Quotes,” Adding and Viewing Notes and Attachments, page 146

Defining Note Types

Access the Note Types page.



Capture Setup Tables

Note Types

Workbench

Save | Refresh | Clone | Search | Next | Previous | Workbench | Personalize

Description Core Setup Data **SetID** SHARE

Note Types Customize | Find | First 1-11 of 11 Last

	Note Type	*Description
1	BILL	Billing Notes
2	CALL	Customer Call
3	CMMT	Comment
4	CNFG	Product Configuration
5	HEAD	Header
6	MTNC	Maintenance
7	PPRC	Pricing
8	RSRC	Research
9	SFA	Sales
10	SHIP	Shipping
11	WEB	Self-Service

Note Types page

Note types appear in the Note Types drop-down list box on the Notes tab of the order entry form.

Note Type Displays the system code identifier for the note type.

Description Displays the description for the note type. This description is visible to the CSR.

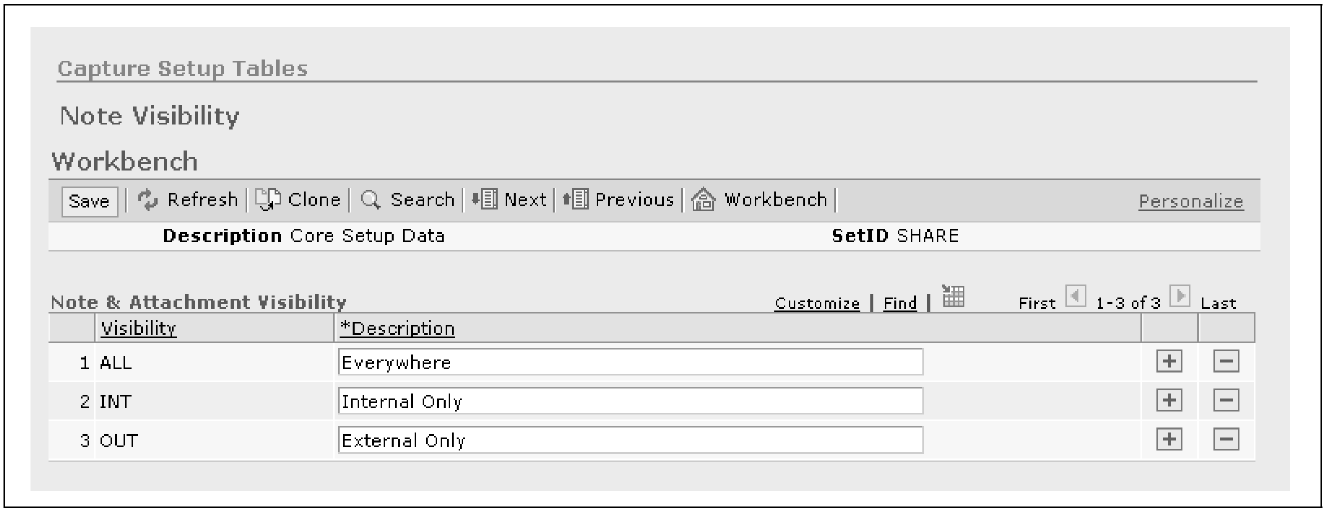
See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Working with Notes and Attachments”

Chapter 8, “Managing Orders and Quotes,” Adding and Viewing Notes and Attachments, page 146

Creating Note Visibility

Access the Note Visibility page.



Note Visibility page

Note visibility appears in the Visibility field of the Notes tab of the order entry form. It controls who may see the note, and it applies equally to notes and attachments. A note can be visible internally to CSRs or externally to PeopleSoft Order Capture Self Service users. For example, if the CSR sets the visibility of a note to *Internal Only*, the self-service user cannot see the note. For attachments, a separate drop-down list box appears when an attachment is added to the order. This field contains the same visibility descriptions.

Visibility Displays the system code identifier for note and attachment visibility.

Description Displays the description for note and attachment visibility. This description is visible to the CSR.

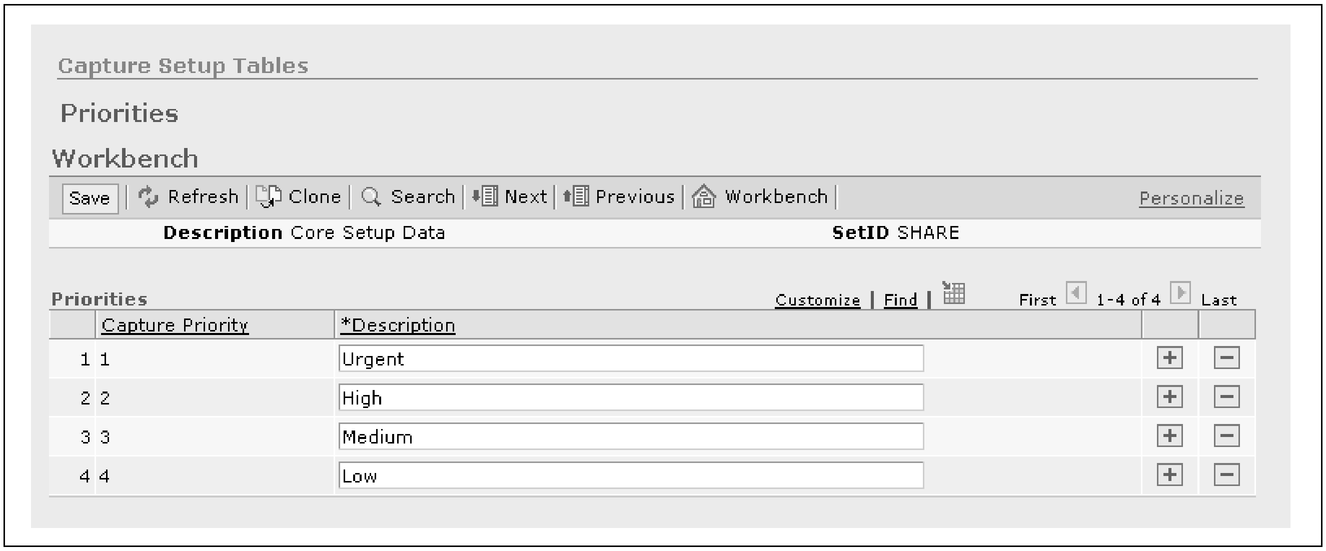
See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Working with Notes and Attachments”

Chapter 8, “Managing Orders and Quotes,” Adding and Viewing Notes and Attachments, page 146

Defining Priorities

Access the Priorities page.



Priorities page

Priority descriptions appear in the header details of the entry form for PeopleSoft Order Capture. They contain no processing logic; they are for informational purposes only.

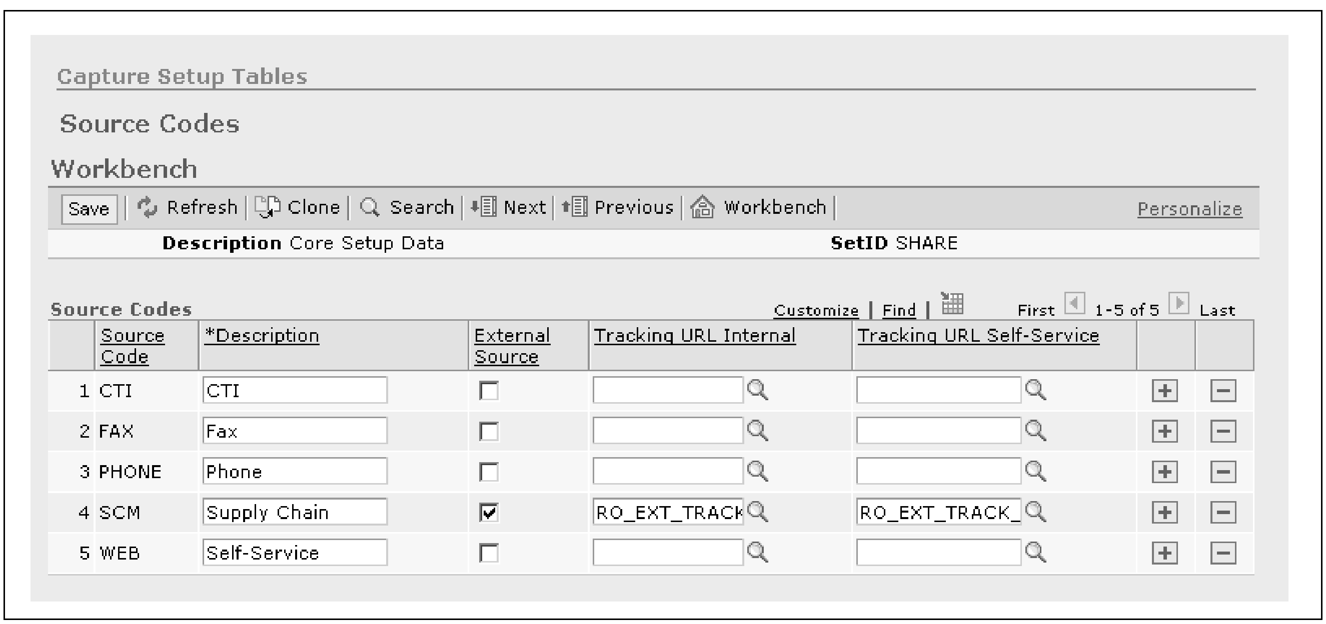
Third-party fulfillment systems can use priorities to determine processing order.

Capture Priority Displays the system code identifier for the capture priority.

Description Displays the description of the capture priority. This description is visible to the CSR.

Defining Source Codes

Access the Source Codes page.



Source Codes page

Source codes indicate the origin of an order or quote, and their descriptions appear in a drop-down list box in the header details of the entry form.

External Source

Select if the order originated from an external system source. For example, you may have another system that generates orders. This option enables you to migrate these orders into PeopleSoft Order Capture so that you can view all of the orders for a particular customer through a single application.

Tracking URL Internal (tracking uniform resource locator internal)

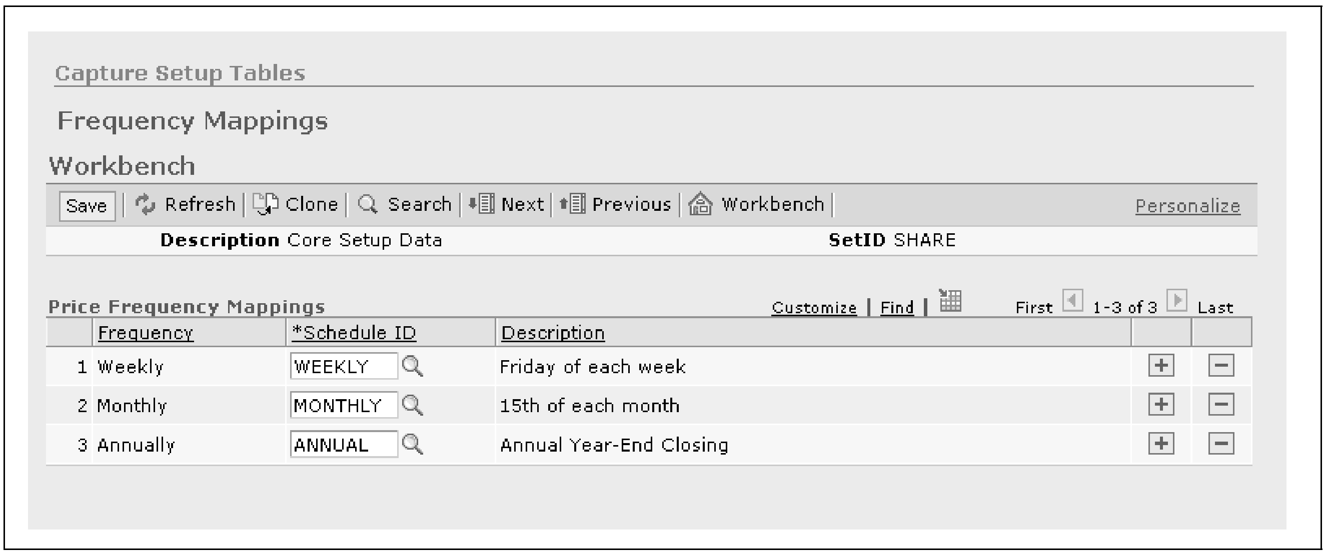
Enter a uniform resource locator (URL) for PeopleSoft Order Capture to view a summary of the externally created orders. When CSRs search for orders or quotes and click one of these externally sourced orders, they are transferred to this URL to view the orders.

Tracking URL Self-Service (tracking uniform resource locator self-service)

Enter a URL for PeopleSoft Order Capture Self Service to view a summary of the externally created orders. When users search for orders or quotes in PeopleSoft Order Capture Self Service, they are transferred to this URL to view the orders.

Defining Frequency Mappings

Access the Frequency Mappings page.



Frequency Mappings page

Price Frequency Mappings

Frequency

Select the relevant PeopleSoft CRM pricing frequency for the schedule that you defined in PeopleSoft Contracts.

Schedule ID

Enter the Schedule ID for purposes of the integration with PeopleSoft Contracts. Schedule ID determines how many billing transactions will be created. PeopleSoft Contracts only supports weekly, monthly, or annual schedule types.

Note. Schedule ID is synchronized from PeopleSoft Financials Management to CRM. It determines the number of billing transactions that are created in PeopleSoft Billing. For example, if a service was $10 per month and was valid for one year, we would want twelve $10 charges to be applied to that customer. This does not mean that the customer is billed twelve times but only that there will be twelve bill lines for that customer. If you bill monthly, then each bill will have one line. If you bill yearly, then each bill will have twelve lines.

See Also

PeopleSoft Transaction Billing Processor 8.8 PeopleBook.

PeopleSoft Financials, Enterprise Service Automation and Supply Chain Management Application Fundamentals 8.8 PeopleBook, "Defining Financials and Supply Chain Management Common Definitions," Defining Common Journal Definitions.

PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook, "Transaction Billing Processor Integration"

Defining Order and Quote Processing

The Capture Type Workbench enables you to configure specific processing for specific capture types.

Note. In this workbench, you apply data from the Setup Workbench to a specific capture type.

This section discusses how to:

- Create type definitions.
- Define hold processing.
- Define business project conditions.
- Define audit events.
- Define maintenance setup.
- Define dynamic events.
- Define MCF types.
- Define process types.

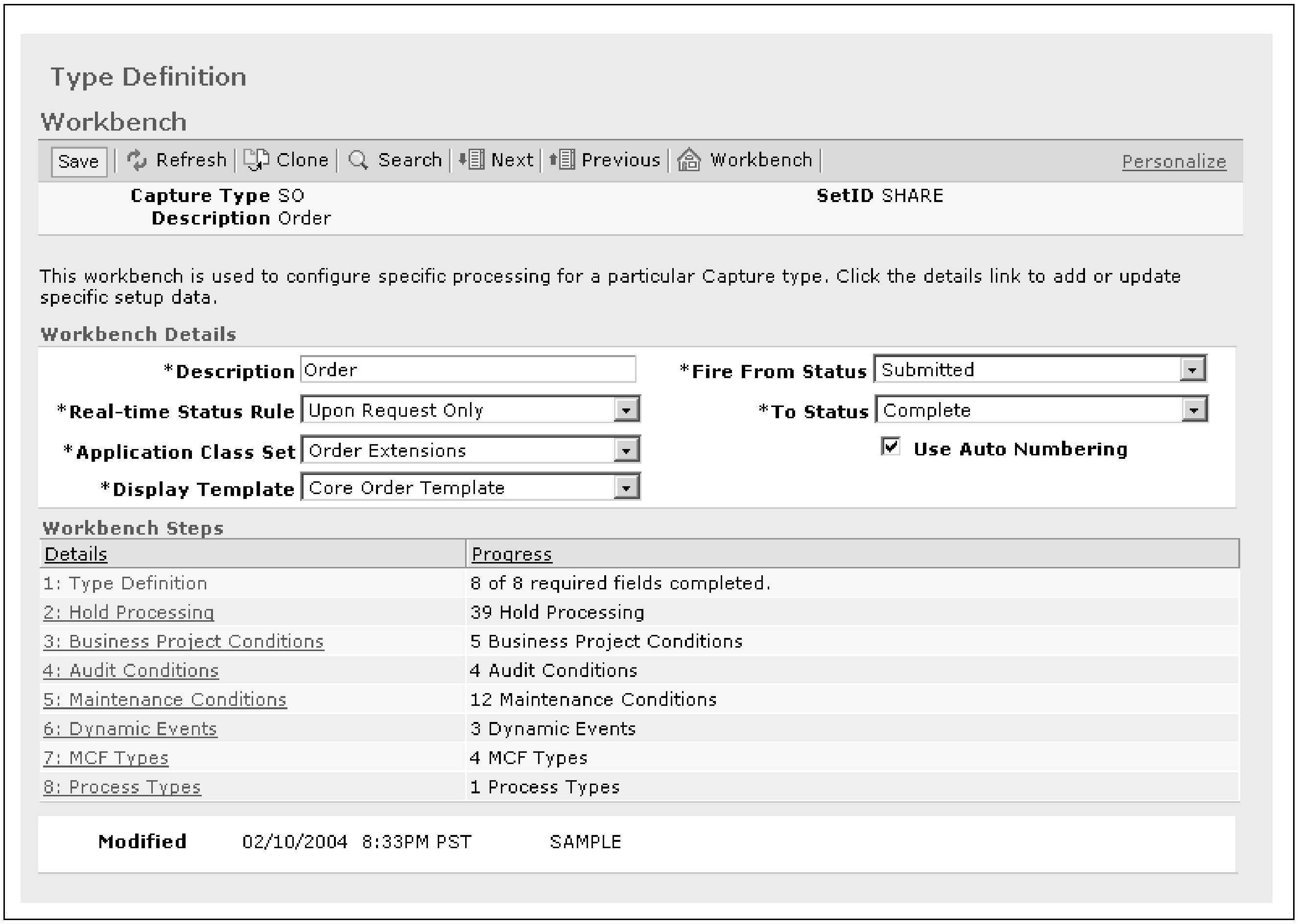
Pages Used to Define Order and Quote Processing

Page Name	Object Name	Navigation	Usage
Type Definition	RO_TYPE	Set Up CRM, Product Related, Order Capture, Capture Type Workbench, Type Definition	Create type definitions for the Order, Quote, and Order Copy capture types.
Hold Processing	RO_TYPE_HOLD	Click the Hold Processing link on the Type Definition page.	Define hold processing for the capture type.
Business Project Conditions	RO_TYPE_BPEVENT	Click the Business Project Conditions link on the Type Definition page.	Define business project conditions that fire for the capture type.
AuditConditions	RO_TYPE_ADEVENT	Click the Audit Conditions link on the Type Definition page.	Define audit events for the capture type.
Maintenance Conditions	RO_TYPE_DEEVENT	Click the Maintenance Conditions link on the Type Definition page.	Define maintenance conditions by defining the data element events for the capture type. Data elements and their associated classes drive the maintenance and audit processing for the capture type.
Dynamic Events	RO_TYPE_DYEVENT	Click the Dynamic Events link on the Type Definition page.	Define dynamic events for this capture type. Dynamic events allow for dynamic, pluggable processing for a capture type, using dynamic event classes.
MCF Types	RO_TYPE_MCFTYPE	Click the MCF Types link on the Type Definition page.	Define MCF types that this capture type uses.
Process Types	RO_TYPE_PROCTYP	Click the Process Types link on the Type Definition page.	Define process types for a capture type.

Creating Type Definitions

To create type definitions, use the Type Definition (RO_TYPE_GBL) component.

Access the Type Definition page.



Type Definition page

Type Definition is the main workbench page for creating type definitions for the Order, Quote, and Order Copy capture types.

Workbench Details

Description

Displays the description of the capture type. This appears during capture entry.

Real-Time Status Rule

Select when to invoke the real-time status enterprise integration point (EIP). Values are:

Upon Request Only: Invokes the EIP when the CSR clicks Refresh on the toolbar.

Prior to Capture Status Only: Invokes the EIP when the user searches and selects a capture.

Capture Status and On Request: Invokes the EIP when the user clicks Refresh and when the user searches and selects a capture.

Do Not Fire.

Fire From Status

Select the status at which the processing occurs, such as *Open* or *In Process.*

Statuses are identified by numeric status codes in the system. The selection here should represent the lowest numeric status code, which is the point at which the real-time status EIP fires.

Application Class Set Select application class set extensions that the system created during the application class registry setup step. *Order Extensions* is the default class set for orders; *Quote Extensions* is the default class set for quotes.

To Status Select the status at which the processing occurs, such as *Open* or *In Process*.

Statuses are identified by numeric status codes in the system. The selection here should represent the highest numeric status code, which is the point at which the real-time status EIP fires.

Use Auto Numbering Select to enable autonumbering schemas, which the system chooses based on capture type and setID. If the system does not use these schemas, then the CAPTURE_ID is generated using the PeopleTools `UIDGen()` built-in function.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Setting Up General Options,” Setting Up Automatic Numbering.

Display Template Control the user interface of the runtime component (RO_CAPTURE) by selecting a display template. Before you can make a selection here, you must create a display template or modify an existing template. You can define a new display template for PeopleSoft Order Capture by navigating to Set Up CRM, Common Definitions, Component Configuration, Display Template Definition. You can modify an existing template by navigating to Set Up CRM, Common Definitions, Component Configuration, Display Template Details.

Note. Display templates allow for extensive configurability. For example, you can choose to divide the order entry form into sections and you can control the visibility of these sections (as well as the fields within the sections) from the display template. We deliver two display templates for PeopleSoft Order Capture. These are CORE_ORDER (Order Template) and CORE_QUOTE (Display template for Quote). Since several industry-specific applications rely upon PeopleSoft Order Capture, other display templates are also made available and those templates contain fields most relevant to that particular sector.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Setting Up SmartViews,” Use of Templates.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Setting Up SmartViews,” Defining SmartView Templates.

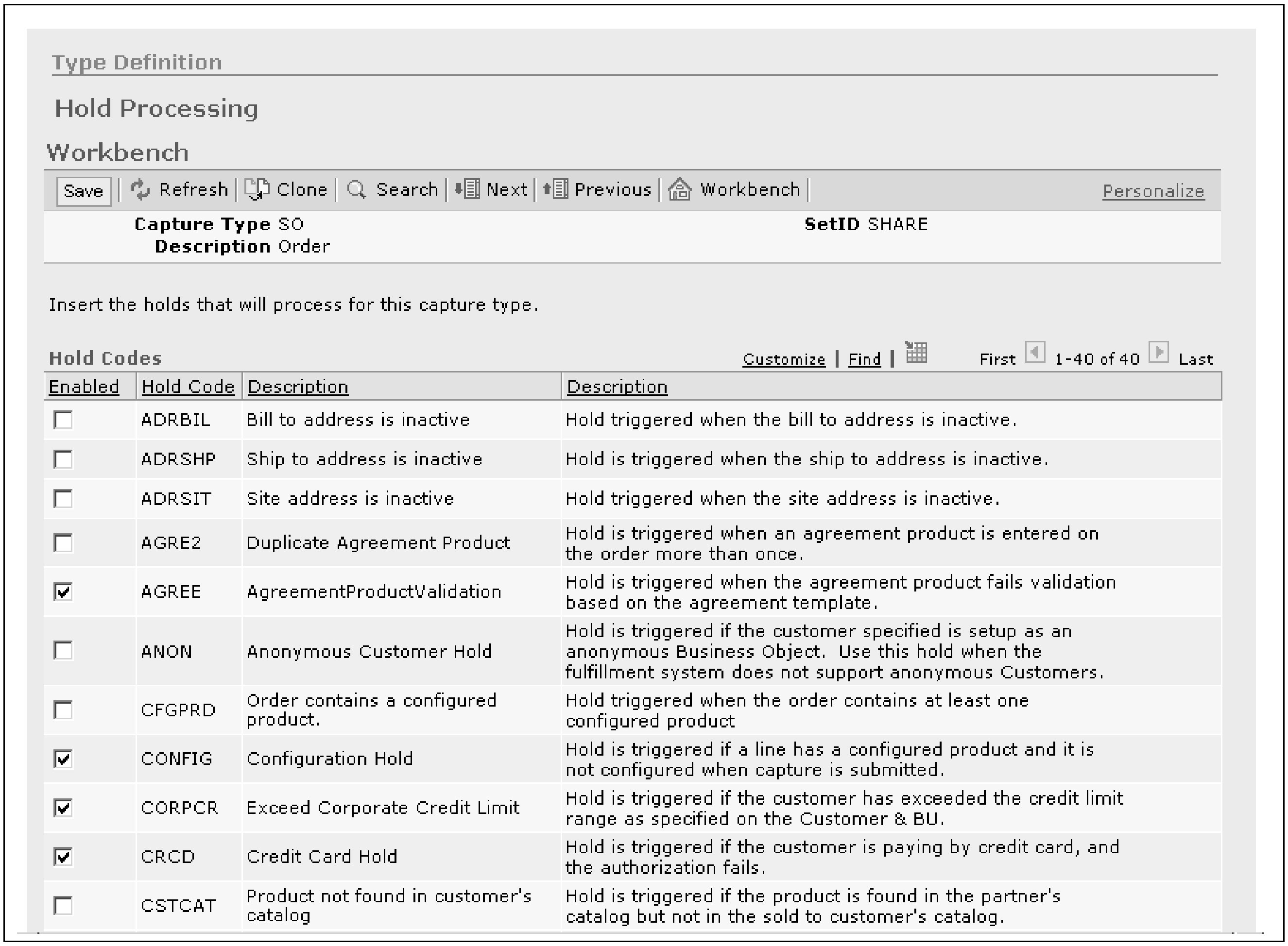
Workbench Steps

Details Click a link in this column to view, create, or modify specific configurations for business processing logic.

Progress Displays the number of steps completed from those that are available.

Defining Hold Processing

Access the Hold Processing page.



Enabled	Hold Code	Description	Description
☐	ADRBIL	Bill to address is inactive	Hold triggered when the bill to address is inactive.
☐	ADRSHP	Ship to address is inactive	Hold is triggered when the ship to address is inactive.
☐	ADRSIT	Site address is inactive	Hold triggered when the site address is inactive.
☐	AGRE2	Duplicate Agreement Product	Hold is triggered when an agreement product is entered on the order more than once.
☑	AGREE	AgreementProductValidation	Hold is triggered when the agreement product fails validation based on the agreement template.
☐	ANON	Anonymous Customer Hold	Hold is triggered if the customer specified is setup as an anonymous Business Object. Use this hold when the fulfillment system does not support anonymous Customers.
☐	CFGPRD	Order contains a configured product.	Hold triggered when the order contains at least one configured product
☑	CONFIG	Configuration Hold	Hold is triggered if a line has a configured product and it is not configured when capture is submitted.
☑	CORPCR	Exceed Corporate Credit Limit	Hold is triggered if the customer has exceeded the credit limit range as specified on the Customer & BU.
☑	CRCD	Credit Card Hold	Hold is triggered if the customer is paying by credit card, and the authorization fails.
☐	CSTCAT	Product not found in customer's catalog	Hold is triggered if the product is found in the partner's catalog but not in the sold to customer's catalog.

Hold Processing page (1 of 3)

☑	CURC	Currency Conversion Not Possible	Hold is triggered if there is no currency conversion available for the pricing engine.
☑	DATECK	Invalid Start / End Dates	Hold is triggered when the start date or end date is missing or invalid for service products.
☑	DISCNT	Discount percent over limit.	Hold is triggered if the total discount on a product is more than what the customer can apply.
☑	FREIGT	Freight Calculation Hold	Hold is triggered when the third party freight calculation fails.
☑	MAXQTY	Exceeds Maximum Order Qty	Hold is triggered if the quantity on the line exceeds the maximum order quantity.
☑	MINMGN	Minimum margin reached	Hold is triggered when the margin for a product is less the the minimum margin allowed.
☑	MINQTY	Under Minimum Quantity	Hold is triggered if the quantity on the line falls below the minimum order quantity.
☑	MINSP	Below Minimum Selling Price	Hold is triggered if the quantity on the line falls below the minimum selling price.
☑	NOBILC	No Bill To Contact	Hold is triggered if the bill to contact is missing.
☑	NOBILL	No Bill To Customer	Hold is triggered if the bill to customer is missing.
☑	NOCC	Credit Card Required Hold	Hold is triggered if Payment Method is Credit Card on File but no credit card is selected.
☑	NOCOMP	No Product Package Components	Hold is triggered if the line has a product that is a package, and no package components have been chosen.
☑	NOLN	No Capture Lines	Validates that the capture has lines.
☑	NOSHIP	No Ship To Customer	Hold is triggered if the ship to customer is missing.
☑	NOSHPC	No Ship To Contact	Hold is triggered if the ship to contact is missing.
☑	NOSITC	No Site Contact Specified	Hold is triggered if the site contact is missing.
☐	NOSITE	No Site Specified	Hold is triggered if the site is missing.
☑	NOSLDC	No Sold To Contact	Hold is triggered if the sold to contact is missing.
☑	NOSOLD	No Sold To Customer	Hold is triggered if the sold to customer is missing.

Hold Processing page (2 of 3)

☐	NRACCT	No Recipient Accounts selected for Bulk Order	Hold triggered when no Recipient Accounts selected for Bulk Order
☑	NRECI	No recipients selected on Bulk Order	Hold triggered when no recipients selected on Bulk Order
☑	PCATLG	Product Catalog Violation	Hold is triggered if the product on the line is not in the customer's catalog.
☑	PINCR	Product Increment Violation	Hold is triggered if the line quantity is not a multiple of the increment defined on the product definition.
☑	PPRE	Product Prerequisite Violation	Hold is triggered if the product on the line has prerequisites that are not installed, or not on the current capture.
☑	PRLS	Price List Not Found	Hold is triggered if there is no price list found by the pricing engine.
☑	PSITC	Line Site Contact Required	Hold is triggered if a product requires a site, and a Site Contact is not one specified.
☑	PSITE	Line Site Required	Hold is triggered if a product requires a site, and there is not one specified.
☑	PTNCAT	Product not found in partner's catalog	Hold is triggered if the product is in the sold to customer's catalog but not in the partner's catalog.
☑	PTNCNT	Partner contact is missing	Hold is triggered when the partner field is populated on the order but there is no partner contact specified.
☑	SRCHRG	Price Surcharge Limit Reached	Hold is triggered when the surcharge percent is more than what the user is allowed to charge.
☑	TOTPRC	Total price limit reached	Hold is triggered when the total order price is higher than the limit allowed for the current user.

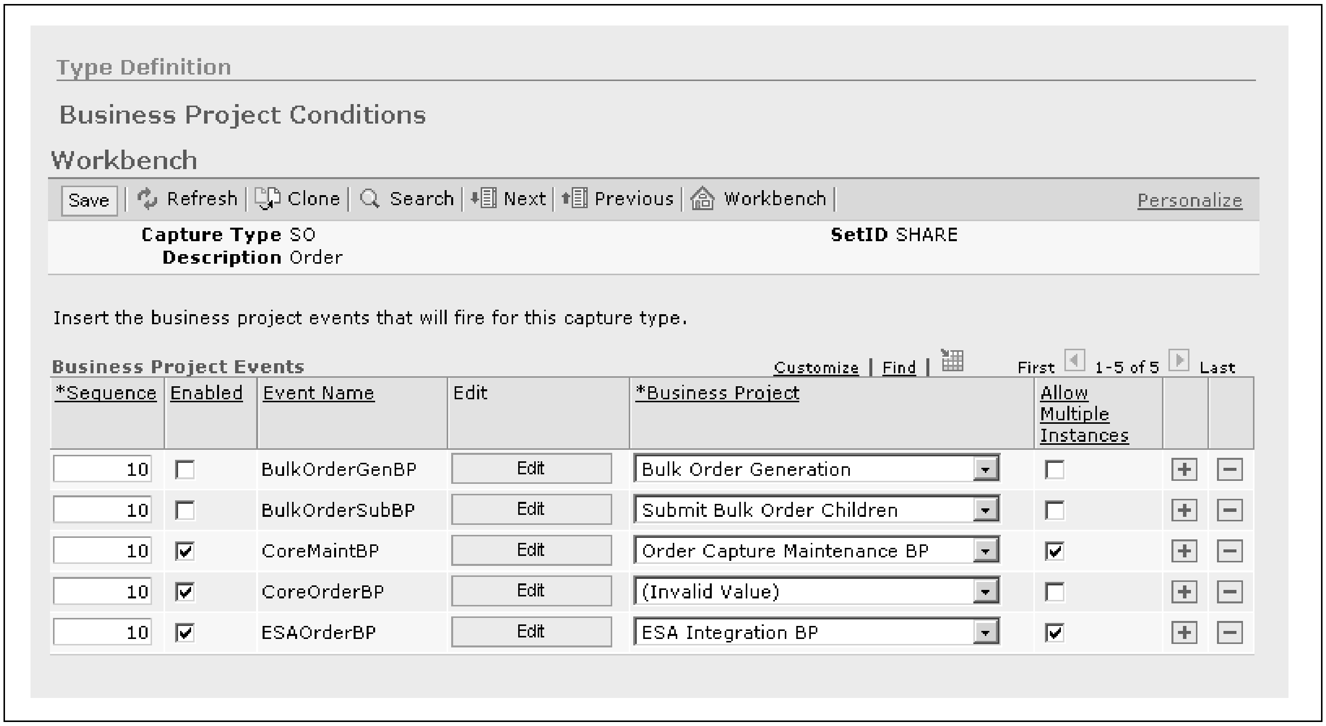
Hold Processing page (3 of 3)

After you define holds in the Setup Workbench, you must enable or disable them for every capture type. Hold conditions appear on the Holds tab of the entry form after submission.

Enabled Select to make the corresponding hold code active or inactive for the current capture type.

Defining Business Project Conditions

Access the Business Project Conditions page.



Business Project Conditionss page

When you submit an order or quote, business projects fire. You can view the type of business project condition that is being used on the Related actions tab of the order entry form . Define business project conditions for each capture type here, and include events for order submission as well as order maintenance activity. You can view or edit the PeopleSoft Proposal Management business project, *Engagement Service BP*

Business Project Conditions

Sequence Enter the order in which the Order Capture business project condition fires when more than one event fires for a single capture.

Enabled Select to fire the corresponding event.

Event Name Displays the descriptive event name for the business project from the Component Event Model setup.

Business Project Select the order capture business project.

PeopleSoft Order Capture delivers three business projects representing the order, the quote, and order change/maintenance.

Allow Multiple Instances Select to enable multiple instances of this business project to start and run against the same capture.

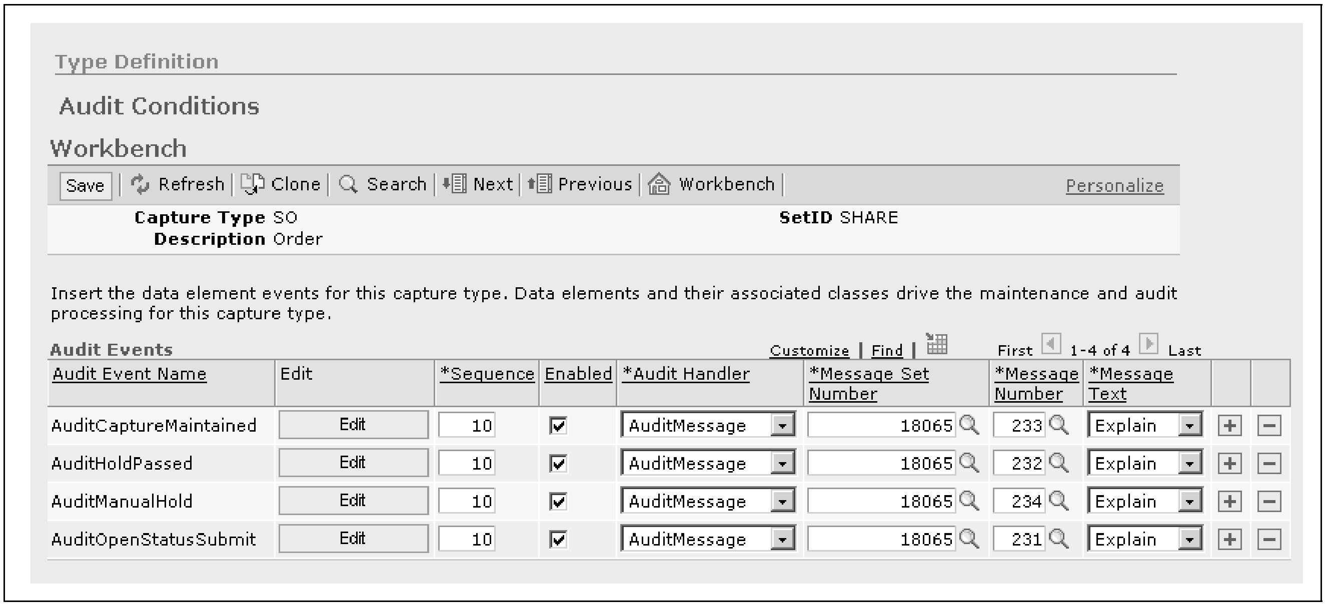
See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Automation Tools”

Chapter 5, “Working with PeopleSoft Order Capture Business Projects,” page 73

Defining Audit Conditions

Access the Audit Conditions page.



Audit Conditions page

Audit events appear in Change History on the History tab of the order entry form. Audits help identify the specific events that took place relative to this specific order or quote.

Audit Events

Audit Event Name Displays the event reference from the Component Event Model setup.

Sequence Enter the sequence in which the audit events fire. Events can fire simultaneously.

Enabled Select to enable the corresponding audit event.

Audit Handler Select the data element from the Setup Workbench extended application class that writes the audit message. A generic audit-message handler writes the message text to the Related History page when the audit event results in *True*. Create other audit handlers if you need configured logic.

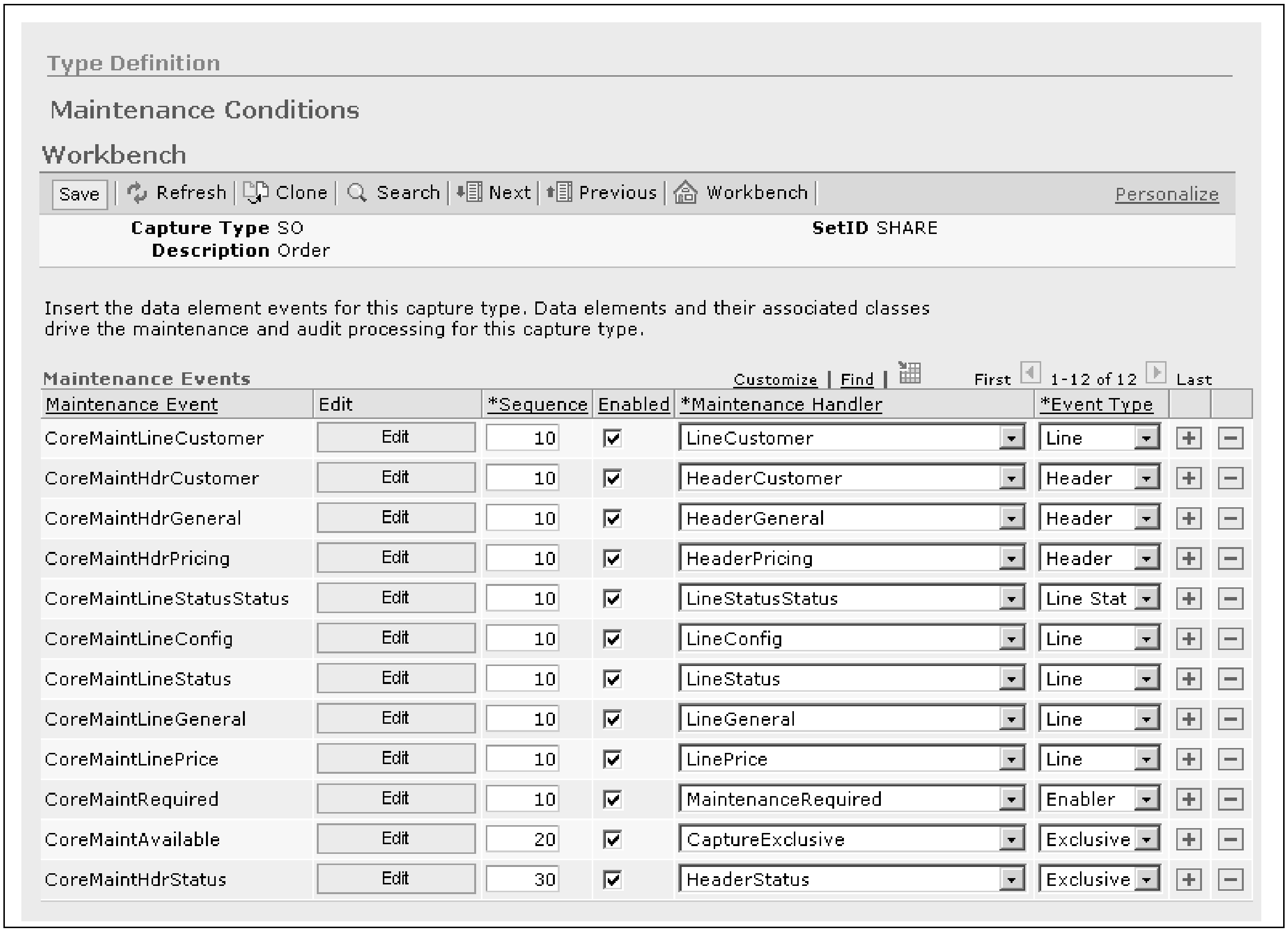
Message Set Number Enter the message set reference of the audit message that the event handler writes to the Related History page.

Message Number Enter the message set number reference of the audit message that is to be written to the Related History page.

Message Text Select whether the audit message’s “explain” text or “short” text is written to the Related History page.

Defining Maintenance Conditions

Access the Maintenance Conditions page.



Type Definition

Maintenance Conditions

Workbench

Save | Refresh | Clone | Search | Next | Previous | Workbench | Personalize

Capture Type SO **SetID** SHARE
Description Order

Insert the data element events for this capture type. Data elements and their associated classes drive the maintenance and audit processing for this capture type.

Maintenance Events — Customize | Find | First 1-12 of 12 Last

Maintenance Event	Edit	*Sequence	Enabled	*Maintenance Handler	*Event Type		
CoreMaintLineCustomer	Edit	10	☑	LineCustomer	Line	+	−
CoreMaintHdrCustomer	Edit	10	☑	HeaderCustomer	Header	+	−
CoreMaintHdrGeneral	Edit	10	☑	HeaderGeneral	Header	+	−
CoreMaintHdrPricing	Edit	10	☑	HeaderPricing	Header	+	−
CoreMaintLineStatusStatus	Edit	10	☑	LineStatusStatus	Line Stat	+	−
CoreMaintLineConfig	Edit	10	☑	LineConfig	Line	+	−
CoreMaintLineStatus	Edit	10	☑	LineStatus	Line	+	−
CoreMaintLineGeneral	Edit	10	☑	LineGeneral	Line	+	−
CoreMaintLinePrice	Edit	10	☑	LinePrice	Line	+	−
CoreMaintRequired	Edit	10	☑	MaintenanceRequired	Enabler	+	−
CoreMaintAvailable	Edit	20	☑	CaptureExclusive	Exclusive	+	−
CoreMaintHdrStatus	Edit	30	☑	HeaderStatus	Exclusive	+	−

Maintenance Conditions page

You can enable or disable maintenance events that you created when you defined maintenance handlers in the Setup Workbench. In maintenance setup, you connect maintenance events, maintenance handlers, and event types.

Maintenance Events Displays a reference to the component event.

Sequence Enter the order in which the audit events fire when more than one audit fires.

Enabled Select to enable the corresponding audit event.

Maintenance Handler Select the data event handler (that you created in the Setup Workbench) that handles processing when the maintenance event evaluates to *True* or *False.* Based on the result of the event, logic is fired to make data elements of the capture editable or uneditable during a maintenance request.

Note. Certain handlers also determine if a capture needs maintenance processing and whether it is allowed based on the evaluation of associated events.

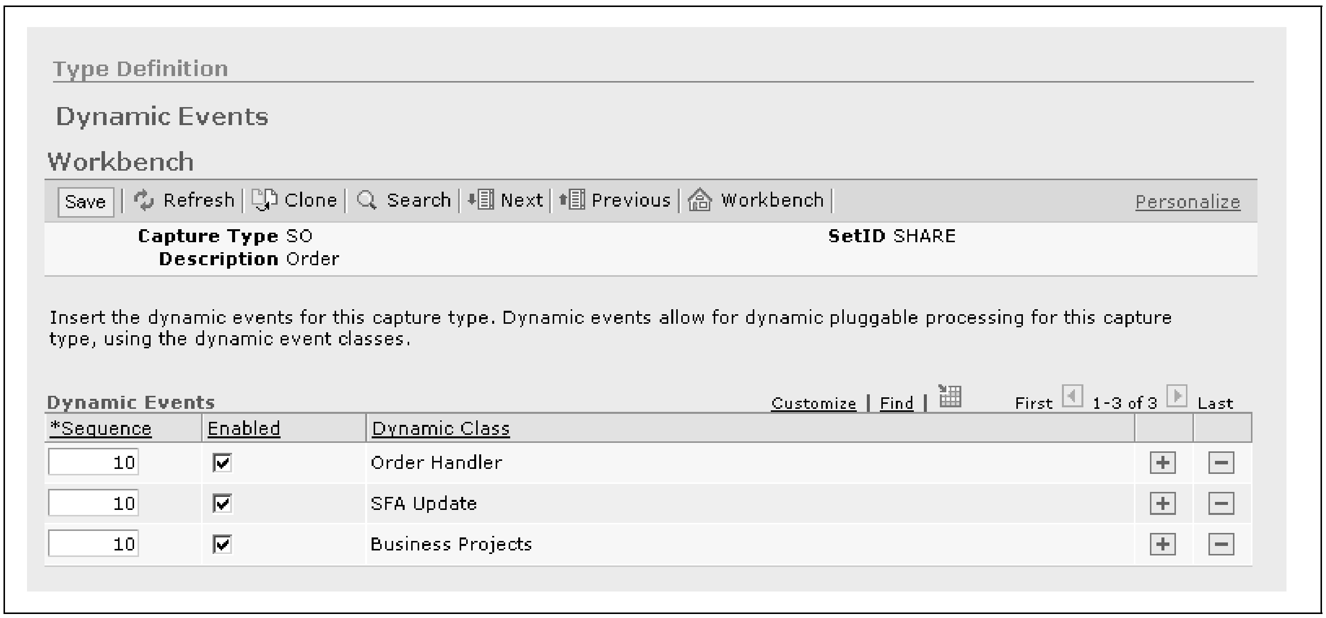
Event Type

Select an event type that determines when the event is run, as well as the level of data that is passed to the maintenance handler. Enabler events are fired when a capture is first loaded. These events determine if maintenance processing is required based on the event definition. If they are required, the handler is invoked, and the system sets the capture internal logic set to *MaintenanceRequired.* Then, the system evaluates exclusive events to determine if the capture can be maintained. The capture is determined as a consequence of the result of these events.

When you request capture maintenance by clicking the Maintain button in the PeopleSoft Order Capture toolbar, the system evaluates remaining events by header, line, and line status, based on the defined sequence. These events determine maintenance eligibility of data. After all events are run, the system presents the capture, with the appropriate editable and maintainable data, to the CSR.

Defining Dynamic Events

Access the Dynamic Events page.



Dynamic Events page

Sequence

Enter the sequence in which the dynamic events fire. Events can fire simultaneously.

Enabled

Clear this check box to disable loading for this application class.

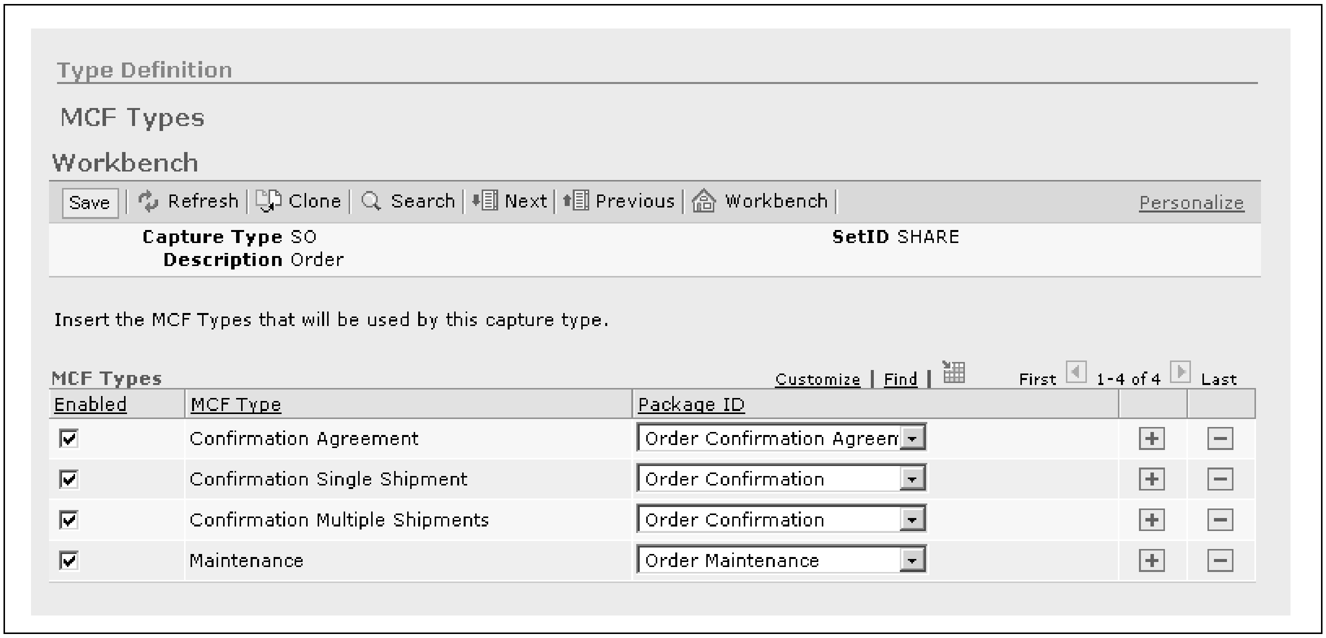
Dynamic Class

Displays a reference class, which you create in the Setup Workbench. These classes dynamically fire during capture processing.

Note. PeopleSoft CRM delivers events for component defaulting and component saving.

Defining MCF Types

Access the MCF Types page.



MCF Types page

To define new correspondences, connect the MCF type and package ID. Once you complete this setup step, you can generate correspondence for PeopleSoft Order Capture.

Enabled Select to enable the MCF type for the corresponding package ID.

MCF Type Displays the event that you defined as an MCF type in the Setup Workbench.

Package ID Select a package ID for PeopleSoft Order Capture. PeopleSoft Order Capture uses predefined templates that facilitate the creation of standardized communication between the user and the CSR. You make templates available to end users by grouping them in *template packages.* These packages can contain one or more *templates definitions*, which in turn reference *template files.* They also have package IDs, which are available for selection here.

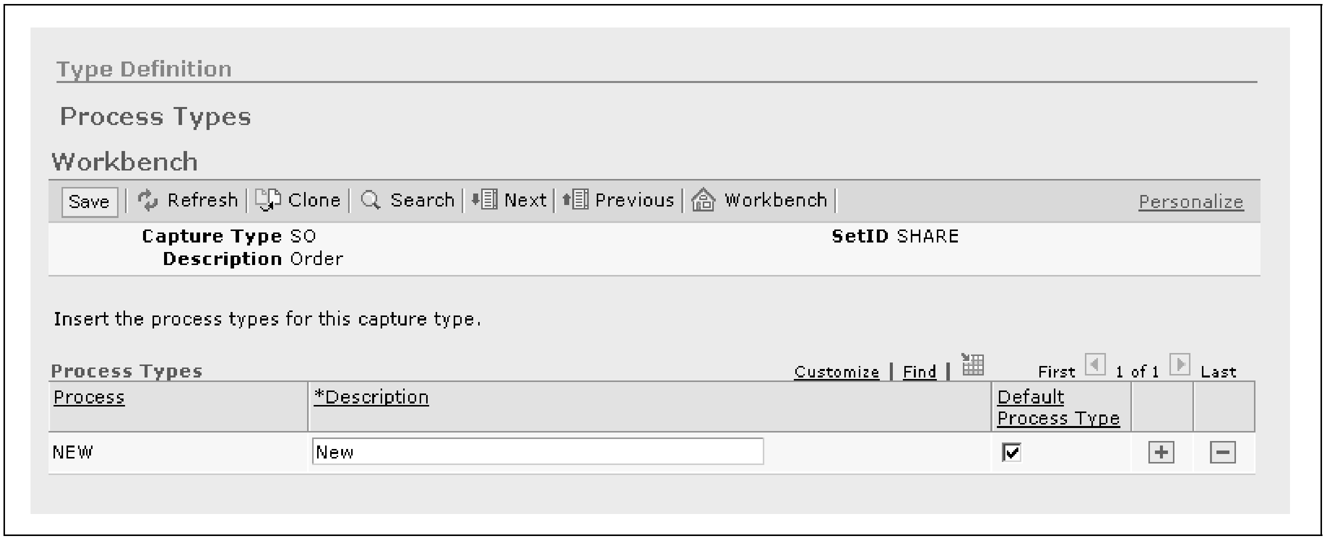
Note. This field contains a list of package IDs that are defined in the correspondence package definition with a usage of *Order Capture* and a language of *English.*

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Correspondence Management”

Defining Process Types

Access the Process Types page.



Process Types page

Note. The PeopleSoft system does not use this capture type definition. However, certain industry-specific applications may create process types here.

Defining Integrations and Mappings

The Integration Workbench enables users to view and edit the integration settings that are required for PeopleSoft Order Capture.

This section discusses how to:

- Define integrations.
- Define header status mappings.
- Define line status mappings.
- Define source mappings.

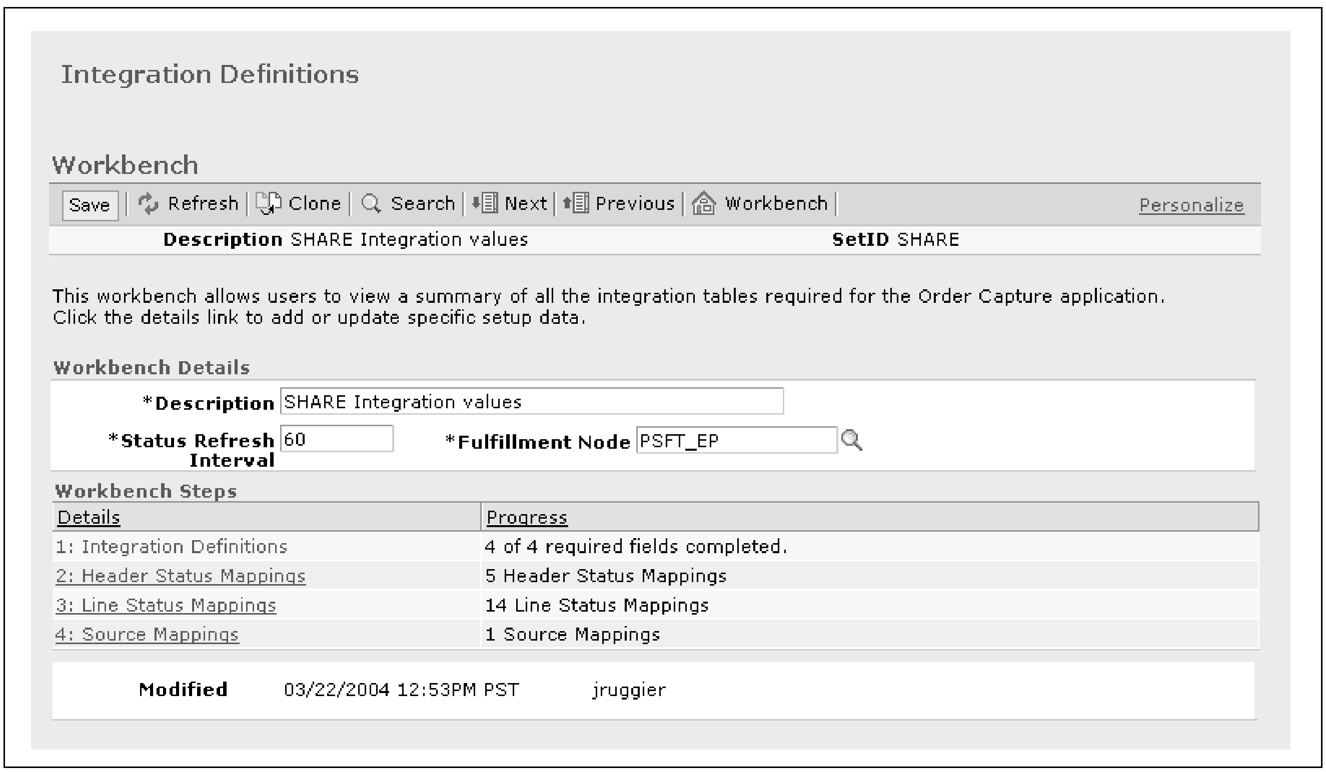
Pages Used to Define Integrations and Mappings

Page Name	Object Name	Navigation	Usage
Integration Definitions	RO_DEFN_INTEGRT	Set Up CRM, Product Related, Order Capture, Integration Workbench, Integration Definitions	Define integrations (such as mapping to fulfillment systems).
Header Status Mappings	RO_DEFN_HDSTMAP	Click the Map Header Status link on the Integration Definitions page.	Define status mappings at the header level to (and from) external systems.
Line Status Mappings	RO_DEFN_LNSTMAP	Click the Line Status Mappings link on the Integration Definitions page.	Define status mappings at the line level to (and from) external systems.
Source Mappings	RO_DEFN_INTSRC	Click the Source Mappings link on the Integration Definitions page.	Define source mappings to message nodes.

Defining Integrations

To define integrations, use the Integration Definitions (RO_DEFN_INTEGRT_GBL) component.

Access the Integration Definitions page.



Integration Definitions page

Workbench Details

Description Displays the description of the integration definition.

Status Refresh Interval Enter the number of seconds that must elapse before the system carries out an additional status call. For example, if the interval is set to 60 (seconds), then the system makes only one status call per minute, regardless of how many times the user clicks the Refresh toolbar button.

Fulfillment Node Enter the Integration Broker node name that the system uses to perform order fulfillment for this setID. Each of the defined header, line, and source mappings refer to this fulfillment node.

Workbench Steps

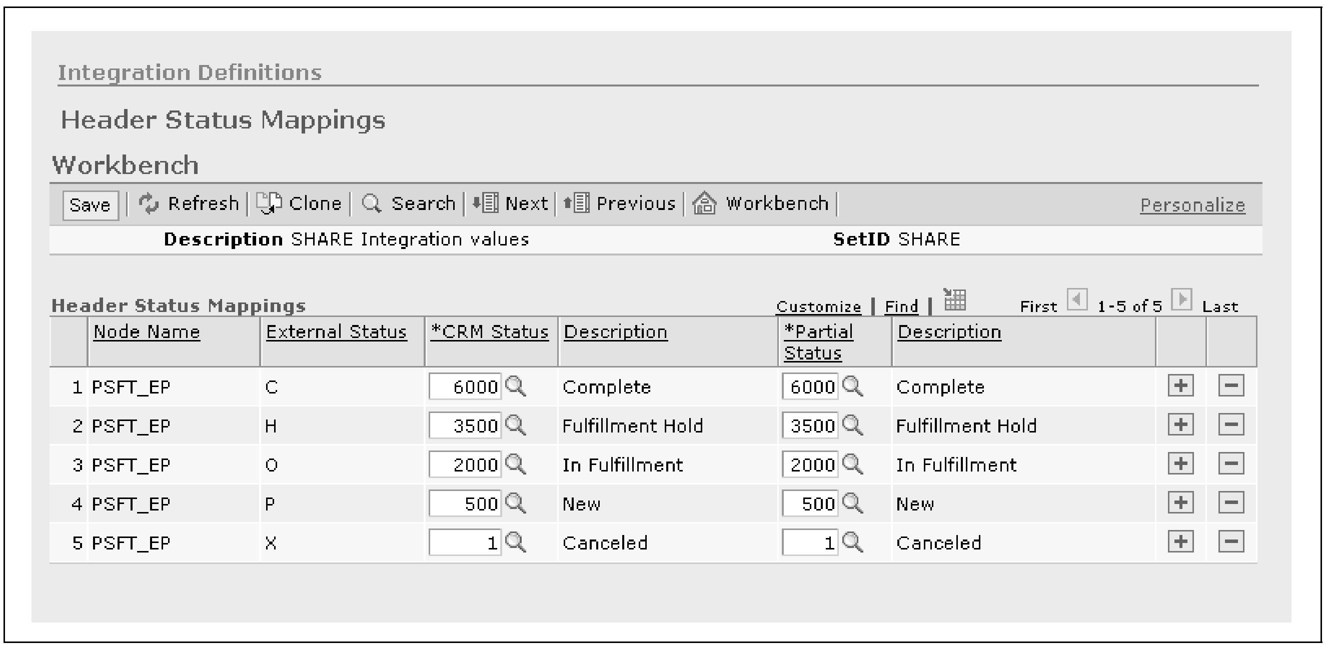
Header Status Mappings Click to access the Header Status Mappings page and define mappings between external-system statuses and internal PeopleSoft CRM statuses at the header level.

Line Status Mappings Click to access the Line Status Mappings page and define mappings between external-system statuses and internal PeopleSoft CRM statuses at the line level.

Source Mappings Click to access the Line Status Mappings page and define mappings between a message node and the corresponding source in PeopleSoft CRM.

Defining Header Status Mappings

Access the Header Status Mappings page.



	Node Name	External Status	*CRM Status	Description	*Partial Status	Description
1	PSFT_EP	C	6000	Complete	6000	Complete
2	PSFT_EP	H	3500	Fulfillment Hold	3500	Fulfillment Hold
3	PSFT_EP	O	2000	In Fulfillment	2000	In Fulfillment
4	PSFT_EP	P	500	New	500	New
5	PSFT_EP	X	1	Canceled	1	Canceled

Header Status Mappings page

For integrations, map PeopleSoft CRM header statuses and partial header statuses to their counterparts in the external fulfillment system.

Node Name Displays the message node that points to an external fulfillment system, which uses the statuses that appear in the External Status column.

External Status Displays the equivalent of the PeopleSoft CRM status for an external system. (Typically, external systems use status values that are different from the status values that PeopleSoft CRM uses.) For example, a PeopleSoft CRM status of *6000* (complete) maps to a status of *C* in PeopleSoft Order Management.

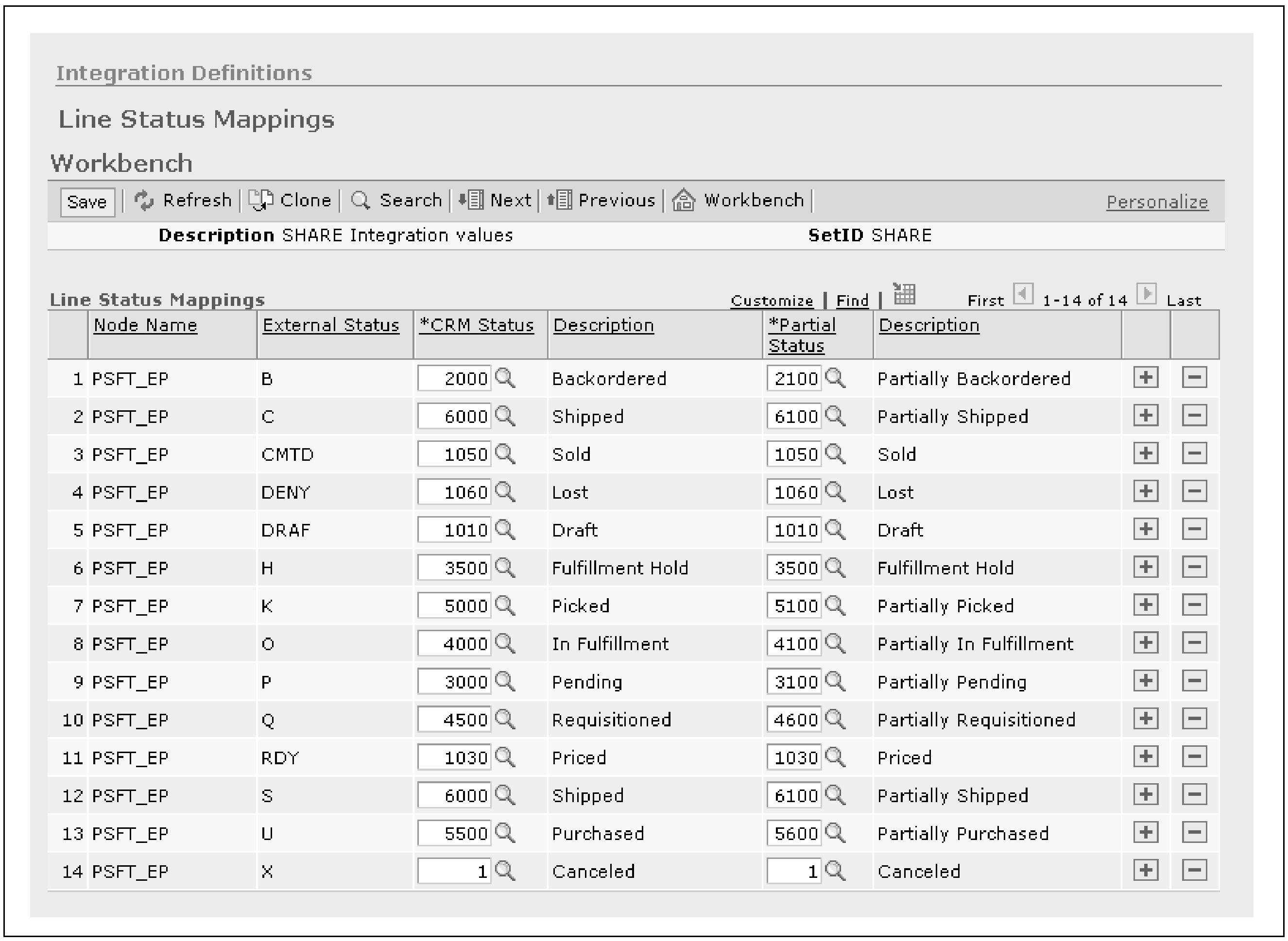
CRM Status Enter the PeopleSoft Order Capture status.

Description Displays the text equivalent value of the numeric status value that you enter. Define the description text for partial statuses in the Setup Workbench Header Statuses step.

Partial Status Enter a partial status code for the header status mapping. Partial status codes are identified in the status header for an order that has order lines in different stages of the fulfillment cycle.

Defining Line Status Mappings

Access the Line Status Mappings page.


Integration Definitions

Line Status Mappings

Workbench

Save | Refresh | Clone | Search | Next | Previous | Workbench | Personalize

Description SHARE Integration values **SetID** SHARE

Line Status Mappings Customize | Find | First 1-14 of 14 Last

	Node Name	External Status	*CRM Status	Description	*Partial Status	Description
1	PSFT_EP	B	2000	Backordered	2100	Partially Backordered
2	PSFT_EP	C	6000	Shipped	6100	Partially Shipped
3	PSFT_EP	CMTD	1050	Sold	1050	Sold
4	PSFT_EP	DENY	1060	Lost	1060	Lost
5	PSFT_EP	DRAF	1010	Draft	1010	Draft
6	PSFT_EP	H	3500	Fulfillment Hold	3500	Fulfillment Hold
7	PSFT_EP	K	5000	Picked	5100	Partially Picked
8	PSFT_EP	O	4000	In Fulfillment	4100	Partially In Fulfillment
9	PSFT_EP	P	3000	Pending	3100	Partially Pending
10	PSFT_EP	Q	4500	Requisitioned	4600	Partially Requisitioned
11	PSFT_EP	RDY	1030	Priced	1030	Priced
12	PSFT_EP	S	6000	Shipped	6100	Partially Shipped
13	PSFT_EP	U	5500	Purchased	5600	Partially Purchased
14	PSFT_EP	X	1	Canceled	1	Canceled

Line Status Mappings page

For integrations, map PeopleSoft CRM line statuses and partial line statuses to their counterparts in the external fulfillment system.

Node Name Displays the message node that is associated with the data.

External Status Displays the equivalent of the PeopleSoft Order Capture order line status for the external system. (Typically, external systems use status values that are different from the status values that PeopleSoft CRM uses.) For example, a PeopleSoft CRM status of *4000* (in fulfillment) maps to a status of *O* (open) in PeopleSoft Order Management.

CRM Status Enter the PeopleSoft Order Capture line status code.

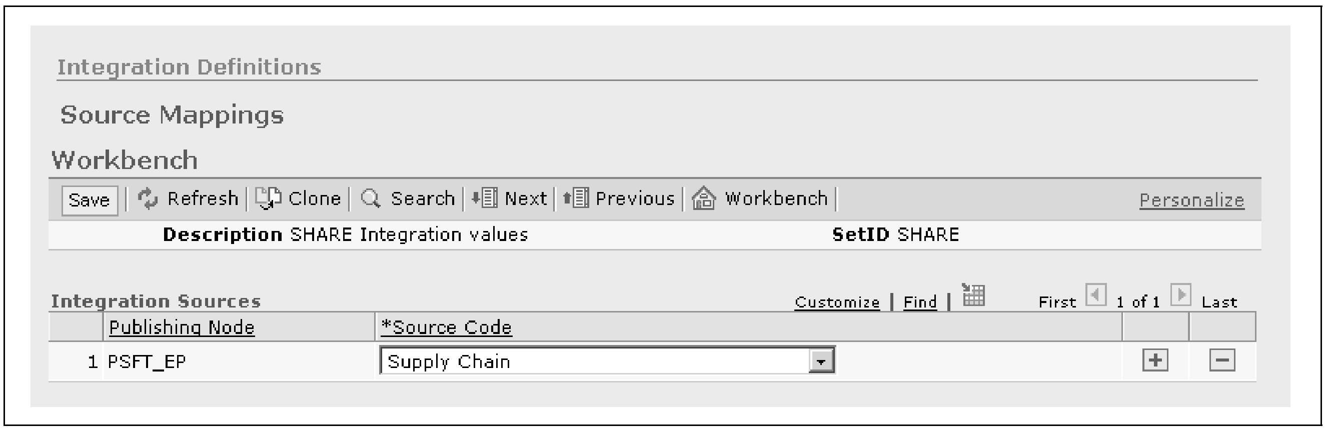
Description Displays the text equivalent value of the numeric status value that you enter. The description of the partial status is visible to the CSR.

Partial Status Enter a partial status code for the line status mapping. Partial status codes identify the status of an order that has order lines in different stages of the fulfillment cycle.

Example: If one schedule on the line is back-ordered (2000) and another schedule is shipped (6000), then the partial status is the partial version of the bigger number—in this case, 6000.

Defining Source Mappings

Access the Source Mappings page.



Source Mappings page

Publishing Node Displays the message node to which PeopleSoft Order Capture sends data. The publishing node provides a mapping between the external node and the source code, which you define on the Source Codes page in the Setup Workbench.

When you are using an external system to display an order, this mapping tells the system to which node to transfer the user and to display the order.

Source Code Select the source code to which this data should map in PeopleSoft Order Capture.

Setting Up Credit Card Integration

This section provides an overview of credit card integration and discusses how to set up credit card processing.

Understanding Credit Card Integration

PeopleSoft Order Capture uses a third-party payment service for acceptance of credit cards as a payment type. Order Capture retrieves credit card information from either the customer profile or when the CSR (or user) enters it during the order submission and checkout process. During this process, the user can save credit card information so that the next time this user signs in, credit card information appears in the appropriate order entry form.

Setting Up Credit Card Processing

To set up credit card processing for PeopleSoft Order Capture and Order Capture Self Service:

- Define the types of credit cards that you accept.
- Establish your merchant account with a third-party credit card provider, such as CyberSource.
- Set up the connection parameters for credit card processing calls.

See *PeopleSoft 8.8 Enterprise Components PeopleBook.*

Setting Up Freight Integration

This section provides an overview of freight integration setup and discusses how to:

- Set up the freight calculation integration.
- Test the freight calculation integration.
- Define carriers.
- Construct tracking numbers.

Understanding Freight Integration Setup

After you correctly install your third-party freight (carrier) application, to set up freight integration, perform these steps from within the PeopleSoft CRM application:

1. Follow the instructions that are provided in the PeopleSoft CRM Installation Guide to properly configure your system.
2. Set up the freight calculation integration.
3. Add a freight calculation *vendor* to the business unit definition.
4. Test the freight calculation integration.
5. Define your carriers.

Page Used to Set Up Freight Integration

Page Name	Object Name	Navigation	Usage
Carriers	CARRIER	Set Up CRM, Product Related, Order Capture, Carrier Definition, Carriers	Define carriers for integration with PeopleSoft Order Capture.

Setting Up the Freight Calculation Integration

PeopleSoft CRM integrates with ConnectShip to calculate freight charges. The freight calculation integration transfers the to address, carrier, and combined product weights data to ConnectShip.

To set up the freight calculation integration:

1. Activate the following application messages: *RATE_REQUEST*, *RATE_REQUEST_XFRM*, and *RATE_RESPONSE*.
2. Confirm that the *ALLPAGES* permission list has full permission to the *FREIGHT* channel.

   Select PeopleTools, Security, Permissions & Roles, Permission Lists, and open the *ALLPAGES* permission list. Select the Message Monitor tab and look for an entry for *FREIGHT.* If not found, add a new entry for the *FREIGHT* channel, and grant it full access.
3. Activate the *FREIGHT* channel through the Message Monitor, on the Channels tab.
4. Activate the *OutSync* node transaction on the node, *PSFT_XOUTBND*, for the *RATE_REQUEST* transaction.

   Select Peopletools, Integration Broker, Node Definitions.
5. Activate the *OutSync* node transaction on the node, *PSFT_XOUTBND*, for the *RATE_REQUEST_XFRM* transaction.

   Note. This transaction uses an *HTTPTARGET* override connector and allows you to specify the URL to connect to Progistics.

   Replace the URL on the *RATE_REQUEST_XFRM* node transaction with your ConnectShip Progistics server URL, which uses the following format: *http://<machine>/Progistics /XML_Processor/Server/XMLProcDLL.asp.*

   If you are not using port 80 on the ConnectShip Progistics server, indicate the port in this URL: *<machine>:8080*
6. Select PeopleTools, Integration Broker, Relationships, and activate the *RATE_REQUEST* relationship.

   On the Trans Modifier tab, select *Edit* and activate the *RATE_REQUEST* modifier.

Testing the Freight Calculation Integration

When you test the integration, use UPS Ground as the carrier.

Note. To carry out the freight calculation test, you must have configured UPS Ground for your business unit on your ConnectShip Progistics server.

To test the freight calculation integration:

1. Open the PeopleSoft Order Capture Business Unit definition in PeopleSoft CRM for the business unit that you set up.

   Select Set Up CRM, Business Unit Related, Order Capture Definition.
2. Click the Test Freight Calculation button.

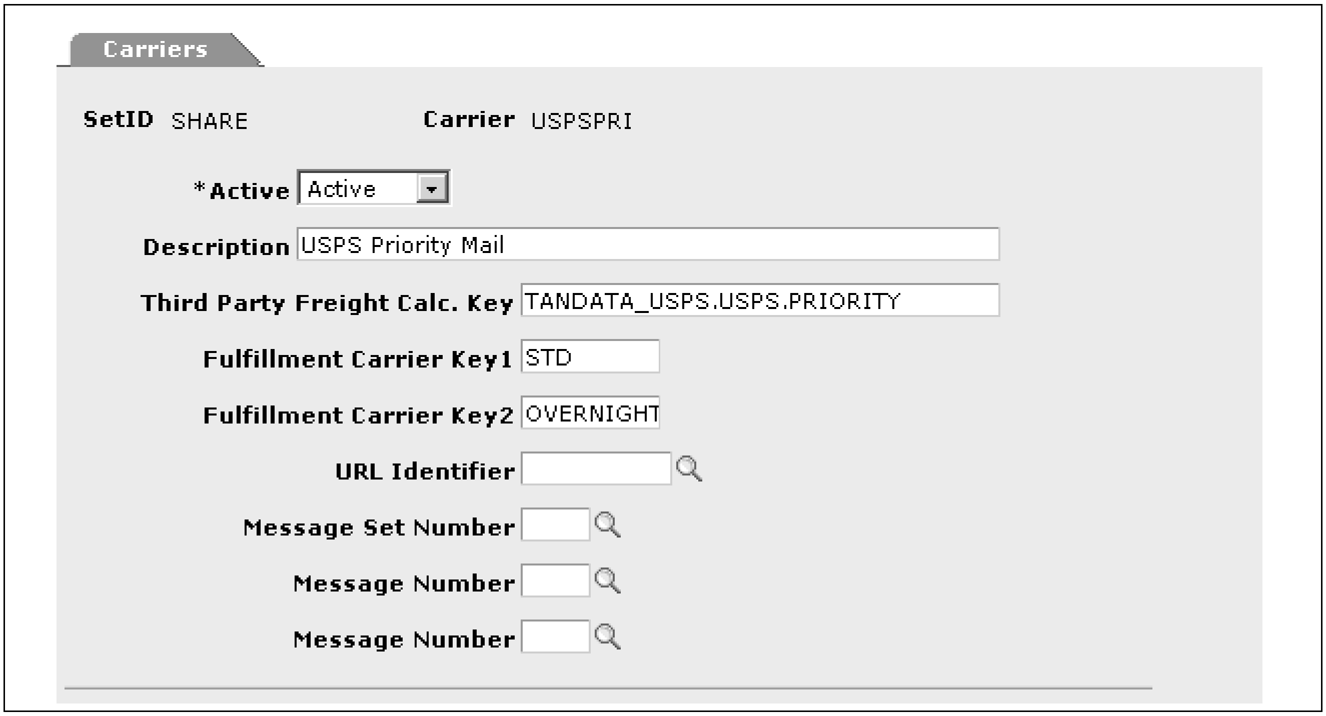
   If an amount other than zero appears, you are set up correctly. If zero appears, check the display message to determine what is not correctly set up.

See Chapter 2, “Defining PeopleSoft Order Capture Business Units,” Creating PeopleSoft Order Capture Business Units, page 16.

Defining Carriers

To define carriers, use the Carriers (CARRIER_GBL) component.

Access the Carriers page.



Carriers page

Active

Select *Active* or *Inactive.* If you select *Inactive,* the carrier does not appear:

- As a valid carrier in the order capture business unit definition for PeopleSoft CRM Order Capture Self Service.
- On the order entry form for PeopleSoft CRM Order Capture.

Description

Enter a description that appears in several order capture locations where shipping information is defined.

Third Party Freight Calc. Key (third-party freight calculation key)

Enter the key that the third-party freight calculation system (for example, the ConnectShip Symbol) uses to identify this carrier.

Fulfillment Carrier Key1 and **Fulfillment Carrier Key2**

Enter keys that map the PeopleSoft CRM carriers to the equivalent carriers in the fulfillment system. For example, if you use PeopleSoft Order Management as your fulfillment system, key 1 would map to Carrier ID, while key 2 would map to Ship Via Method.

URL Identifier

Use this URL to construct a link to the carrier’s shipment tracking page.

Message Set Number

Displays two message numbers.

Message Number

Enter the message numbers that the system uses to construct the package tracking link.

Constructing Tracking Numbers

An order may consist of multiple shipments and, consequently, of multiple tracking numbers. PeopleSoft Order Capture and Order Capture Self Service support the construction of a single tracking link, which displays all shipments at once.

To construct a tracking link:

1. Point the URL identifier to a URL definition.

   This is the static (unchanging) portion of the carrier's tracking URL.

2. If there is more than one shipment to track, ensure that the first message catalog entry message number is appended to the URL.

   Parameter %1 within the message is replaced by the package number (for example, *1* for the first package, *2* for the second package). The shipment's tracking number replaces Parameter %2. If only one shipment is being tracked, this message is not used in constructing the URL.

3. For the last package, append the second message catalog entry to the URL using the same parameter replacement rules as the first message number.

Note. You use the second message catalog entry only if a tracking link is constructed for one package. If the second message catalog entry is not present, then you use the first message catalog entry.

UPS Example

If two United Parcel Service (UPS) packages are tracked at once, this link would work:

http://wwwapps.ups.com/etracking/tracking.cgi?sort_by=status&track=Track&TypeOfInquiryNumber=T&InquiryNumber1=444&InquiryNumber2=555

Note. PeopleSoft CRM ships with the URL definition UPS_TRACK, which is defined as http://wwwapps.ups.com/etracking/tracking.cgi?sort_by=status&track=Track&TypeOfInquiryNumber=T. PeopleSoft CRM also ships with a single message catalog entry: 18065, 80. This contains &InquiryNumber%1=%2.

When you construct this link, the URL definition is initially appended with this message catalog entry. Replace %1 with the first shipment number (1) and %2 with the tracking number for the first shipment (444), which yields this string: http://wwwapps.ups.com/etracking/tracking.cgi?sort_by=status&track=Track&TypeOfInquiryNumber=T&InquiryNumber1=444. The next shipment is the final shipment, but because there is no defined second message catalog entry, the first entry is appended once more. This becomes the final link: http://wwwapps.ups.com/etracking/tracking.cgi?sort_by=status&track=Track&TypeOfInquiryNumber=T&InquiryNumber1=444&InquiryNumber2=555.

FedEx Example

This link tracks two Federal Express (FedEx) shipments (tracking numbers 444 and 555):

http://www.fedex.com/cgi-bin/tracking?action=track&tracknumbers=444,555.

The URL definition, FEDEX_TRACK, contains http://www.fedex.com/cgi-bin/tracking?action=track&tracknumbers=. The message catalog entry 18065, 81 is %2, (note the comma). The message catalog entry 18065,82 is simply %2.

Note. FedEx does not use the %1 parameter (which is the shipment number).

For these two packages, the URL definition is initially appended with the first message catalog entry and becomes http://www.fedex.com/cgi-bin/tracking?action=track&tracknumbers=444.

For the final package, the second message catalog entry is used and appended to the above string, resulting in http://www.fedex.com/cgi-bin/tracking?action=track&tracknumbers=444,555.

If only one package is tracked, the second message catalog entry is appended to the URL definition, yielding http://www.fedex.com/cgi-bin/tracking?action=track&tracknumbers=555.

Note. In the last example, the first message catalog entry was not used.

Defining Tax Installation Options

This section provides an overview of tax installation options setup and discusses how to define tax provider options.

Understanding Tax Installation Options Setup

PeopleSoft Order Capture works with third-party systems such as Taxware, Vertex, and WorldTax to calculate taxes on orders.

Once the preferred tax application is installed to work with PeopleSoft CRM applications, you must define tax settings for your business units and then define advanced tax installation options for either Taxware or Vertex. Taxware uses the STEP feature, while Vertex uses its Tax Decision Maker (TDM). If you use these, you must select the appropriate check boxes on the Tax Provider page.

Note. You can also take advantage of product groups.

Tax Settings for Business Units

Business units determine tax sets, which are entered when you define your business units on the Order Capture Definition page.

See Chapter 2, “Defining PeopleSoft Order Capture Business Units,” Creating PeopleSoft Order Capture Business Units, page 16.

Tax Product Groups

You can set up product tax groups to take advantage of the Taxware Product Matrix or the Vertex Product Taxability files in Vertex TDM.

A *tax product group* is a product group with a product group type of Tax, which you define in PROD_GROUP_TBL.

Note. If you organize your data wisely, using tax product groups reduces taxing errors and product maintenance time.

Each order line has a single product ID. You can associate a tax product group with each product. PeopleSoft Order Capture sends the product ID and the tax product group through the interface, and Taxware or Vertex determines whether the product ID or product tax group takes precedence.

Note. If you use Taxware, you can simplify data entry by creating tax product groups that are equal to any of the Taxware product codes that apply to your company's business. Create or update your product IDs with the tax groups that apply.

See *PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook*, "Setting Up Products," Defining Products.

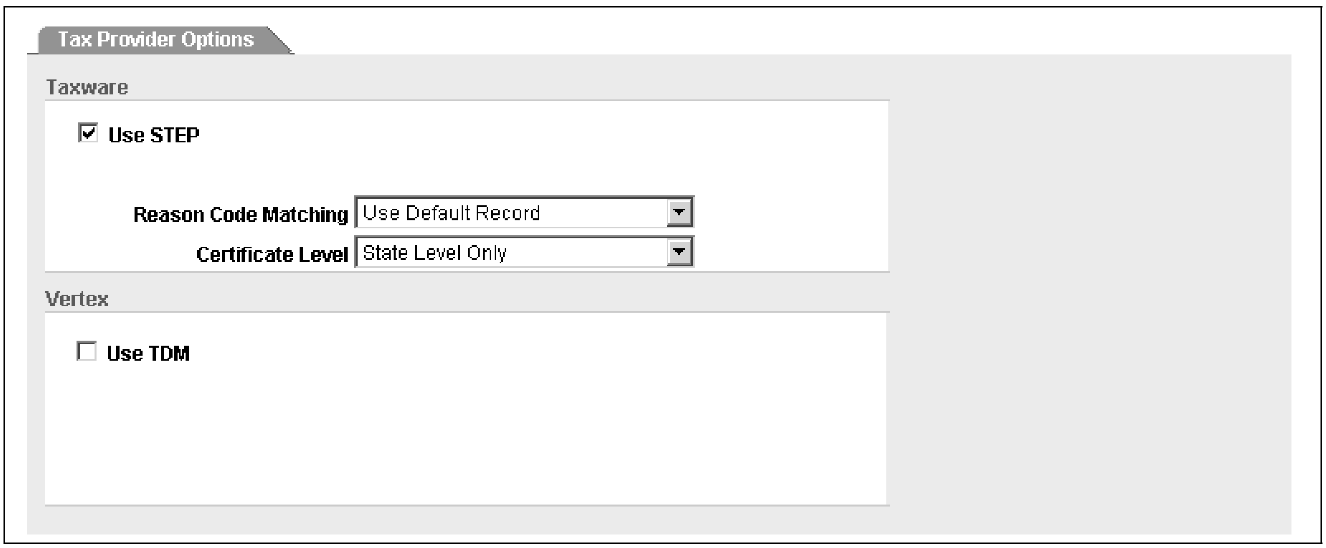
Page Used to Define Tax Installation Options

Page Name	Object Name	Navigation	Usage
Tax Provider Options	TAX_PROV_INFO	Set Up CRM, Product Related, Order Capture, Tax Provider Options, Tax Provider Options	Define tax provider (Taxware or Vertex) options.

Defining Tax Provider Options

To define tax provider options, use the Tax Provider Options (TAX_PROV_INFO_GBL) component.

Access the Tax Provider Options page.



Tax Provider Options page

Taxware

Use STEP

Select, if you are using the Taxware STEP module, to indicate that additional fields must be sent through the interface.

Reason Code Matching

Select how you want to handle tax certificate entry reason lookup in STEP. Select *Exact Reason Code Match,* the more restrictive of the two options, to have Taxware find only tax certificates that were entered with the exact reason code that you set up on the order line. If you select *Use Default Record,* Taxware looks for an exact match. If it does not find one, it uses a default tax certificate for exemption.

Certificate Level

Select which taxing jurisdiction level tax certificates apply. If you select *Individual Certificate Levels*, STEP looks for certificates at all individual levels and exempts tax only for the levels at which a certificate is found. *State Level Only* prompts STEP to look for a certificate only at the state level.

Vertex

Use TDM

Select to use the Vertex TDM application to set up exceptions to taxability rules in the states where they apply. In TDM, you can set up product classes, which are equivalent to tax product groups and product IDs. You can decide whether to use product IDs or product classes.

CHAPTER 4

Understanding Product, Pricing, and Catalog Setup

PeopleSoft Order Capture uses the following object elements: product data, a pricing engine, and a catalog.

This chapter discusses:

- Products, PeopleSoft Enterprise Pricer, and catalogs.
- Product setup.
- Pricing setup.
- Catalog setup.

See Also

PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook, “Setting Up Products”

PeopleSoft Enterprise Pricer 8.9 PeopleBook

PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook, “Creating Catalogs”

Products, PeopleSoft Enterprise Pricer, and Catalogs

This section previews the integration of products, pricing, and catalogs with PeopleSoft Order Capture.

Products

Product definitions provide the foundation for many features of PeopleSoft Customer Relationship Management (PeopleSoft CRM), including product ordering, catalogs, and catalog searches. Product records are also used by PeopleSoft Advisor to create the Advisor dialogs that are accessed from within PeopleSoft Order Capture and PeopleSoft Order Capture Self Service.

You can use many of the elements used to define products—such as product brand, product category, product group, and product attributes—to dynamically generate catalogs based on criteria that you specify. For example, you can create rules that select only certain brands for inclusion in a catalog or that include products based on their attributes.

Pricing

PeopleSoft Enterprise Pricer enables real-time, dynamic pricing on quotes and orders based on company pricing policies. PeopleSoft Order Capture users define rules that determine which discounts, surcharges, giveaways, and conditions apply. As products are added to a quote or an order, PeopleSoft Enterprise Pricer applies all of the pricing rules that match the defined conditions to determine a final price. Conditions might include number of products ordered, type of customer, or customer region. The same pricing engine also allows customer service representatives (CSRs) to manually adjust prices and view all price adjustments related to an order or a quote.

Catalogs

The PeopleSoft CRM Catalog contains a hierarchy of products that PeopleSoft Order Capture and PeopleSoft Order Capture Self Service can access. You can access catalogs from different locations within the collaborative selling suite of applications. Users can navigate directly to Catalog Search and enter search criteria in the search dialog box, or configure the PeopleSoft CRM portal homepage to display a catalog search pagelet. You can also navigate to the catalog by using the order form.

Note. To navigate to the catalog by using the order form, you must have the PeopleSoft CRM Portal Pack installed.

Using the order form, CSRs can search catalogs for product information. PeopleSoft Order Capture Self Service customers can also view catalog information.

In addition, you can restrict user access to a product by validating it against a catalog when the product is added to an order.

CSRs and customers can also access the product catalog by way of PeopleSoft Advisor dialogs, and CSRs and customers can launch PeopleSoft Advisor from the catalog to retrieve product recommendations based on dialog interactions.

Product Setup

To define products and packages in PeopleSoft CRM, you:

1. Create definitional elements to associate with product elements such as product brand, product category, and competency codes.

   These are reusable attributes that you associate with product IDs in step 2 to create unique product and package definitions.

2. Create the product and associate definitional elements (as well as other product attributes and parameters) with the product IDs.
3. Assign product units of measure on the Product Attributes by UOM page.
4. Define package components on the Package Components page (for products defined as packages).
5. Establish product prices using the Product Price page (for individual products and packages with top-level pricing) or the Product Component Pricing page (for packages using component-level pricing).
6. Define product relationships on the Product Relationships page.
7. Associate standard or custom notes with products on the Notes page.

See Also

PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook, “Setting Up Products”

Pricing Setup

Documentation on how to set up and use PeopleSoft Enterprise Pricer appears in the *PeopleSoft Enterprise Pricer 8.9PeopleBook.*

See *PeopleSoft Enterprise Pricer 8.9 PeopleBook.*

Catalog Setup

PeopleSoft CRM enables you to define the layout and content of online product catalogs for internal and external use. You define the look and feel of catalogs by creating display templates, and then define the contents that you want to organize and present according to your template definitions. You can designate products for inclusion in a catalog either by direct association (using product IDs) or by creating business rules to dynamically build product content based on the selection criteria that you define. Similarly, you can control user access to catalogs (as well as tailor catalogs to users) by directly associating user IDs with specific catalogs or by setting up business rules to establish permissions.

See Also

PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook, “Creating Catalogs”

CHAPTER 5

Working with PeopleSoft Order Capture Business Projects

This chapter provides an overview of PeopleSoft Order Capture business projects and discusses how to:

- Define PeopleSoft Order Capture business projects.
- View PeopleSoft Order Capture business projects.

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Setting Up Business Projects”

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Using Business Projects”

Understanding PeopleSoft Order Capture Business Projects

PeopleSoft Customer Relationship Management (PeopleSoft CRM) delivers business projects that automatically manage certain predefined application processes. Using a business project to manage these tasks simplifies the management of conditional logic that often varies based on industry and customer-specific needs.

PeopleSoft Order Capture delivers three prebuilt business projects, each of which is a combination of phases and tasks designed to manage the order capture business process. PeopleSoft Order Capture business projects are advantageous because they automate the processing steps for orders and quotes. To enable the configuration of key order processing events, PeopleSoft Order Capture uses business projects as the agent to initiate and verify those events. Specifically, they trigger and confirm the status of key events such as email confirmation, creation of installed product records, publishing of data to a fulfillment system, and notification of shipment completion.

Note. PeopleSoft Order Capture business projects are registered as actions related to the order and can therefore be found on the Related actions page of the Order Capture component.

This table describes the three PeopleSoft Order Capture business projects that the PeopleSoft system delivers:

Business Project	Object Name	Event Name	Internal Description	Triggering Event
Order	CORE_ORDER_ BP	CoreOrderBP	Order Capture BP	The order status changes to *Open*. The business project is instantiated when the STATUS_ CODE field on the RO_HEADER record equals a code status of 1000.
Order Maintenance	CORE_ORD_ CHG_BP	CoreMaintBP	Order Change BP	When an order is maintained and submitted, the system saves changes to the order to RO_HISTORY. When an RO_ HISTORY record is created with Open status, this triggers the CoreMaintBP event. The business project is instantiated when the RO_HISTORY_ STATUS field on the RO_HISTORY record changes to OPEN status.
Quote	CORE_QUOTE_ BP	CoreQuoteBP	Quote BP	The quote status changes to *Open*. The business project is instantiated when the STATUS_ CODE field on the RO_HEADER record equals a code status of at least 1000.

Note. PeopleSoft Order Capture also supports several industry-specific business projects. Applications such as PeopleSoft Enterprise Phone Number Administration, PeopleSoft Enterprise Client Management, PeopleSoft Enterprise Policy and Claims Presentment, PeopleSoft Enterprise Banking Transactions, PeopleSoft Enterprise Bill Presentment and Account Management, and PeopleSoft CRM for High Technology include their own business projects that are tailored to the specific needs of their respective industries. Consult the documentation for those applications to better understand how their business projects plug in to the PeopleSoft Order Capture framework.

Defining PeopleSoft Order Capture Business Projects

This section supplements the general PeopleSoft CRM documentation, which explains how to set up business projects for all PeopleSoft CRM applications. Because PeopleSoft Order Capture delivers a centralized Capture Type Workbench, the method by which you set up your business projects is slightly different from other PeopleSoft CRM applications.

This section provides an overview of business project definition and discusses how to set up and view PeopleSoft Order Capture business projects.

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, "Setting Up Business Projects"

Understanding Business Project Definition

Order, quote, and maintenance business projects, like other business projects, are broken down into phases, tasks, and transition rules. *Tasks* are the basic unit of work in a business project. *Phases* represent groups of tasks. When you create your phases, tasks, and transition rules, you define the central element of the business projects. *Transition rules* establish the conditions by which the business project moves from one phase to the next.

Phases

Phases encapsulate one or more related tasks and constitute the main steps of the business project. Phases are always performed sequentially. For each phase in a business project, you define its possible target phases and the conditions under which each target is appropriate. These conditions are called *transition rules.*

PeopleSoft Order Capture business projects contain several phases. For example, there are eight main phases in the order business project (CORE_ORDER_BP), but there are only two phases in the quote business project (CORE_QUOTE_BP). These specific phases are identified and explained below.

Tasks

When you set up a phase, you define the sequence of tasks in the phase. Tasks are single actions that directly correspond to an Application Engine program or Data Mover script. A new task begins when all preceding tasks in a phase are complete.

Tasks within a single phase can be performed either in parallel or in sequence. To define tasks in parallel, you assign each task the same sequence number. Sequence numbers for several tasks in PeopleSoft Order Capture business projects possess the same sequence number and are therefore performed simultaneously.

Note. To view sequence numbers, access the Capture Type Workbench, Business Projects page.

See Chapter 3, "Setting Up PeopleSoft Order Capture," Defining Business Project Conditions, page 52.

Transition Rules

Transition rules determine the transition from one phase to the next, based on the success or failure of tasks within that phase. The outcome of a task can be:

- *Cancelled.*
- *Complete - Success.*
- *Complete - Failed.*

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Setting Up Business Projects,” Defining Tasks

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Setting Up Business Projects,” Defining Phases

Setting Up and Viewing PeopleSoft Order Capture Business Projects

Business project setup for PeopleSoft Order Capture can be broken down into three main steps:

1. Access the Business Projects component: Set Up CRM, Common Definitions, Business Projects.

   There, you define all of the elements of the business project, including the phases, tasks, and transition rules, as well as any time delays.

   Note. PeopleSoft Order Capture delivers predefined business projects. In this step you need only verify that these predefined business projects work for your business model.

   See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Setting Up Business Projects”.

2. Access the Event Definition component: Setup CRM, Common Definitions, Event Definition.

   Here, you define the triggering action that first launches the business project. The PeopleSoft system has predefined the triggering action for each of the business projects that the PeopleSoft system delivers. If these triggering events need to change for your business, you can change them here.

   Note. The PeopleSoft system delivers a check every 120 minutes that repeats for the Order and Order Maintenance business projects. These two business projects repeatedly check the fulfillment system every two hours to see if the maintenance that has been requested has been processed. You should adjust this workflow action value to best suit your business needs, as smaller time delays cause more frequent processing activity on Process Scheduler and thus increase the load on your system.

   ---

3. Access the Business Project Events page in Capture Type Workbench: Set Up CRM, Product Related, Order Capture, Capture Type Workbench, Business Project Events.

   Here you can perform the following tasks:

   - Add business project events that fire for the Order or Quote.
   - Enable or disable delivered business projects.
   - Alter the sequence of the business project events so that they fire sequentially or in parallel.
   - Allow multiple instances of the business project.

     This is recommended for Order Maintenance, but not for Order or Quote.

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Setting Up Business Projects”

Viewing PeopleSoft Order Capture Business Projects

This section discusses how to:

- View the PeopleSoft Order Capture business project tree.
- View the order business project.
- View the order maintenance business project.
- View the quote business project.

See Also

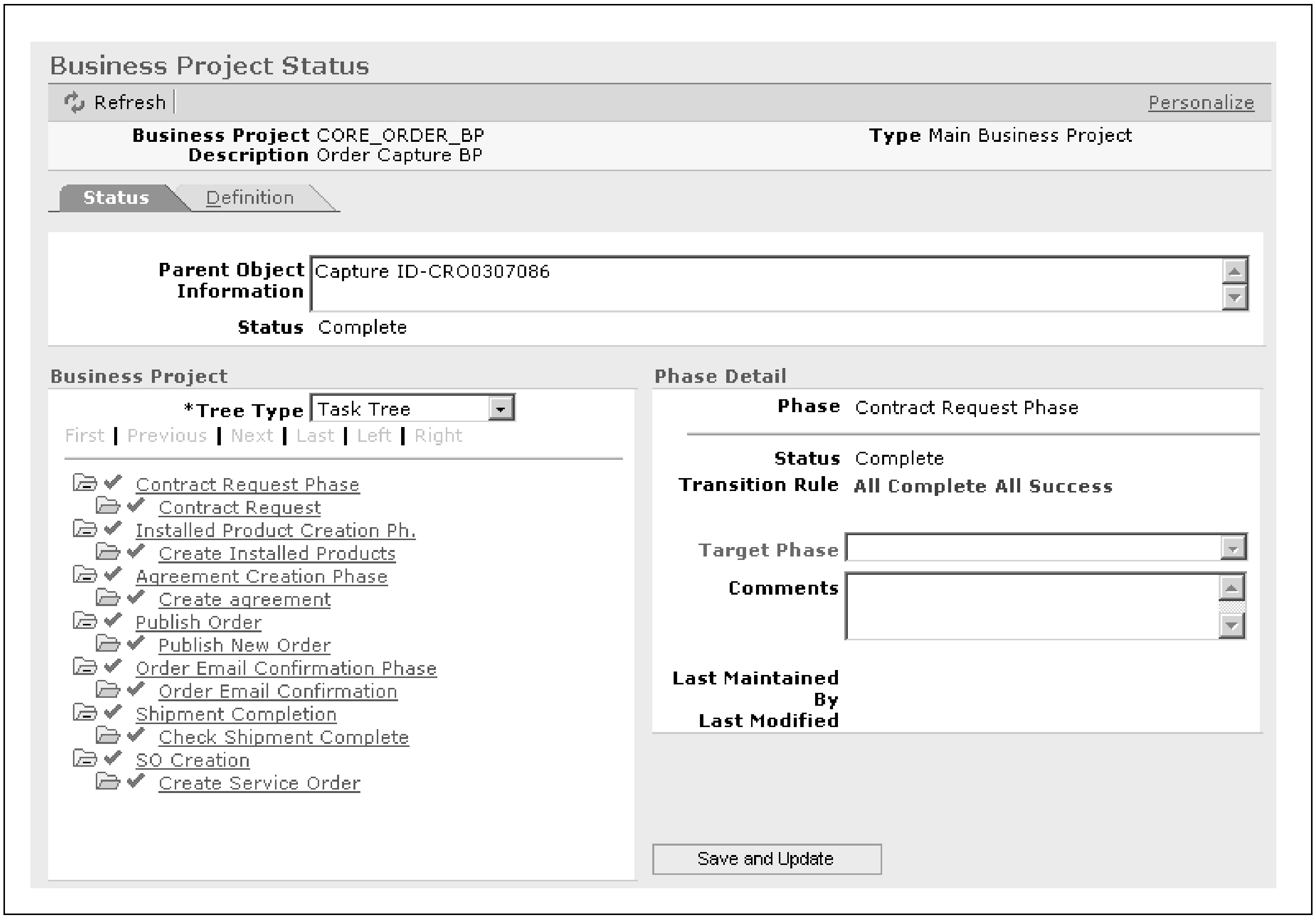
PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Using Business Projects”

Page Used to View PeopleSoft Order Capture Business Projects

Page Name	Object Name	Navigation	Usage
Business Project Status	RC_BP_STATUS	Orders and Quotes, Search Orders and Quotes, Related Actions Click the View Details button on the Related Objects page.	View the status of all three PeopleSoft Order Capture business projects.

Viewing the PeopleSoft Order Capture Business Project Tree

Access the Business Project Status page.



Business Proejc

The PeopleSoft Order Capture business project tree provides a visual representation of the business project. The left side of the page displays all phases and their possible targets. Clicking a phase causes the right side of the page to display details such as the phase's task list and the transition rules for each of its targets. The first phase appears at the top of the tree, and each time there is a transition to a different phase, that new phase is added to the tree. Because business project definitions permit any phase to transition to any other phase, a single phase can be instantiated more than once and, as a result, can appear multiple times in the tree.

Note. Only phases that have been instantiated appear in the tree. The system does not display future phases because it cannot tell which ones will be instantiated.

Status

Enter the overall status of the PeopleSoft Order Capture business project. When you first invoke a business project, the status is *In Process.* You can manually change the status to *Cancel* any time before the business project is finished. When the project is finished, the system updates the status to *Complete.*

You cannot manually set the business project status to *Complete.* The only way to complete a business project is to transition out of the last activity (either manually or automatically).

Outcome

Appears only for sub-business projects whose outcomes are set manually. Once the sub-business project is complete, set the outcome to either *Success* or *Failed.*

Description

Displays the text from the field specified on the Parent Object page of the business project definition. If the information is not descriptive enough, return to the parent object to modify it.

The description is the only information provided about the parent object from which this business project was invoked.

 and 

These icons appear at the top level of the tree hierarchy; they indicate phases that have been instantiated. They enable you to expand and collapse the tree.

Indicates the second level of the tree hierarchy.

Indicates that the task or phase is in progress.

Indicates that the task or phase is canceled.

Indicates that the task was successfully completed or that the phase is complete.

Note. Phases do not distinguish between successful and unsuccessful completion.

Indicates that the task has failed.

Note. This does not necessarily mean that the task will end. For example, the Order Maintenance business project automatically checks shipment status every 120 minutes. If there has been no shipment or if the order has not been canceled, the task displays this icon, and the business project repeats the task. The task continues to kick off every two hours (placing this icon in the Tree Viewer each time) until successful. For each instance that there has been no shipment or order cancelation, you see this icon in the tree.

Phase Detail

This region appears when you select a phase from the business project summary region.

Phase

Displays the name of the phase currently selected in the business project tree.

Status

Displays the phase status. Values are: *In Process*, *Complete*, or *Canceled*. (If you cancel a business project, the phase that was in progress is also canceled.)

Phase statuses don't distinguish between successful and unsuccessful completion.

Transition Rule

Displays how the system transitioned to the selected phase, or indicates that transition was performed manually. If the phase is not complete, no text appears.

Target Phase

To make a manual transition, select the next phase and save the page. You can do this only if the transition definition specifies a manual transition.

Manually transitioning out of a phase changes the source phase's status to *Complete*, but it does not affect the status of any of the incomplete tasks in the source phase.

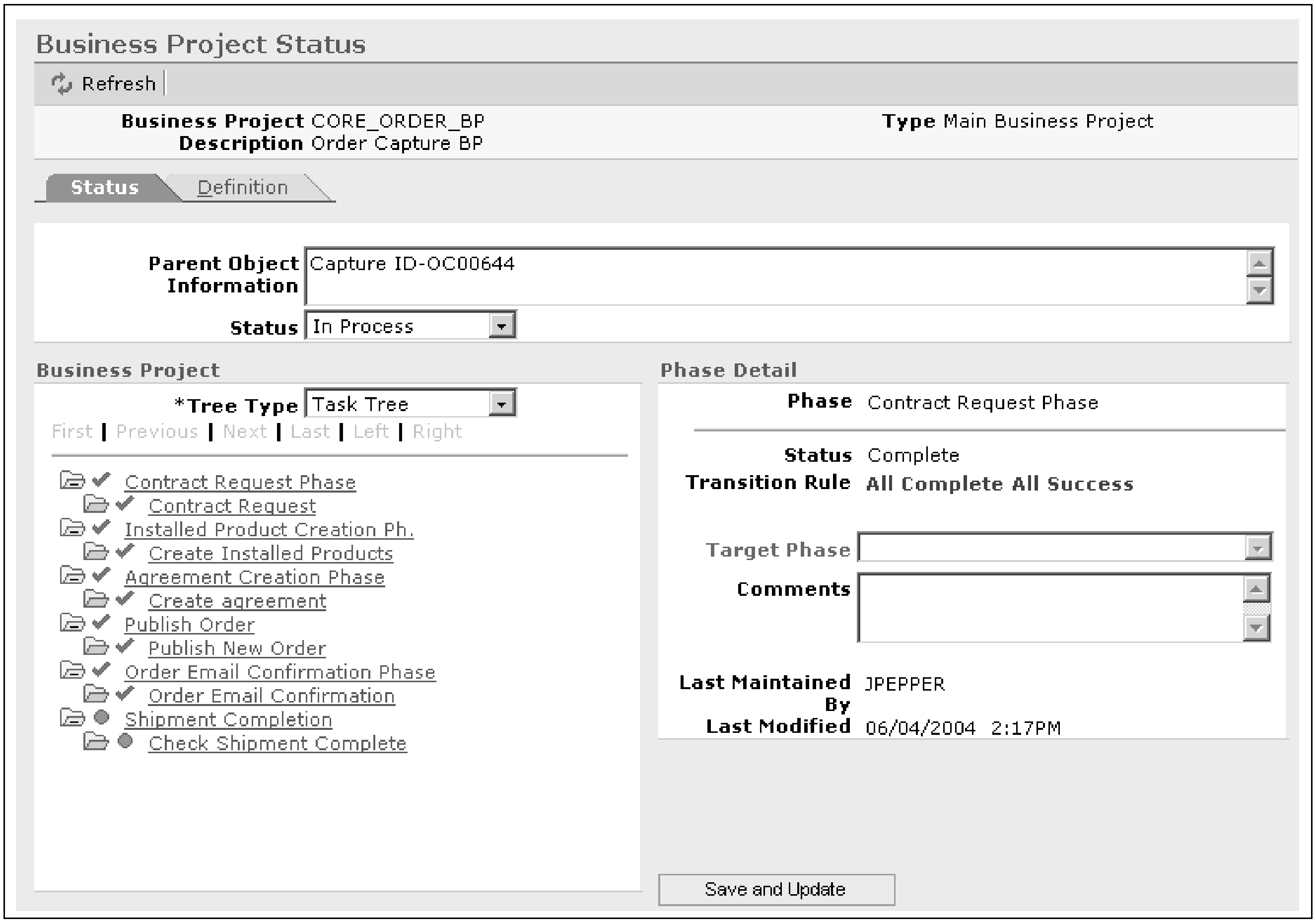
Updating the Tree

Save and Update Tree

Click to save changes to the page and to update the business project tree based on those changes. For example, click this button to complete a manual transition after you select a phase from the Target Phase drop-down list box.

Viewing the Order Business Project

Access the Business Project Status page.



Business Project Status page

Order Business Project Phases

Contract Request

When the PeopleSoft Contracts integration is in effect, this phase examines the Contract Mapping table for the Customer and Business Unit on the order to determine if there is a Contract number. If there is, this phase is marked complete. If there is no Contract number for this customer and business unit, a Contract Request message is sent to the PeopleSoft Contracts system, and the phase will wait until CRM receives a response from PeopleSoft Contracts with the contract number. Once the response is received, this phase will be marked *Complete.*

If the PeopleSoft Contracts integration is not active, this phase will immediately be marked *Complete*and the next phase of the business project executes.

Note. The Workflow Rule RO Contract Request, which is the event performed by the CONTRACT_REQ task, runs the Application Engine program RO_CONTR_EIP.

Installed Product Creation

For order lines that require installed products, this phase creates the installed products with the status as indicated in the Product Definition component. The order may contain products that require an installed product, as indicated by the Installed Product page in the Product Definition component.

In addition, when creating installed products for serialized items, the system creates one installed product for each quantity ordered. For nonserialized items, the system creates a single installed product for the entire quantity ordered on the order line.

Installed products contain values from the order, such as customer information, site, order ID, and quantity ordered.

Note. The Workflow rule, RO_Create Inst Prod, which is the event performed by the CREATE_IP task, runs the Application Engine program RO_CREATE_IP.

See *PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook*, “Setting Up Products,” Defining Products.

Agreement Creation

When the order contains an agreement product, the Agreement Creation Phase will create the new agreement, or update the selected existing agreement with the products being covered.

Note. The Workflow Rule RO_Create Agreement which is the event performed by the CREATE_AG task, runs the Application Engine program RO_CREATE_AG.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Setting Up and Managing Agreements and Warranties”.

Publish Order

When the order is fulfilled by an external system, this phase publishes the order details, provided the application message CRM_SALES_ORDER is active.

When the PeopleSoft Contracts integratin is in effect, and the order contains service or agreement products, this phase will publish the CONTRACT_TXN application message, if the message is active.

Note. The Workflow rule, RO_EIP Publish, which is the event performed by the PUB_NEW_ORDER task, runs the Application Engine program RO_EIP_PUB.

See Chapter 6, “Integrating with Fulfillment and Billing Systems,” page 87.

Order Email Confirmation

This phase uses the Multi-Channel Framework to send an email confirmation to the primary email address of the contact on the order. On completion of this phase, the system creates a “correspondence” entry on the Related Objects page of the order. The confirmation email provides a current snapshot of the order, including order number, status, order line details, order totals, and shipping details.

If no primary email address exists for the order contact, no email confirmation is sent.

Note. The Workflow rule, RO Order Email Confirmation, which is the event performed by the ORDER_EMAIL task, runs the Application Engine program RO_SND_EMAIL.

Shipment Completion

This phase examines the status of the order header for a *Completed* or *Cancelled* status. If the order is found to be complete or canceled, this phase exits with a *Successful* status.

If the order contains service or agreement products, the order line status for these products will be set to *Complete* as no fulfillment process is necessary. If it is found that this order contains *only* service or agreement products, the order header status will be set to *Completed* and this phase exits with a *Successful* status.

Should this order contain products requiring fulfillment, this phase will wait until the fulfillment process notifies the business project that all lines are fulfilled. This can happen through the Advanced Shipping Notice, Sales Order Status or Real-Time Status EIPs. Once the business project is notified that all lines are fulfilled, this phase exits with a *Successful* status.

Note. The Workflow rule RO_Check Shipment Completion, which is the event performed by the CHK_SHP_COMPLETE task, runs the Application Engine program RO_SHP_OVR.

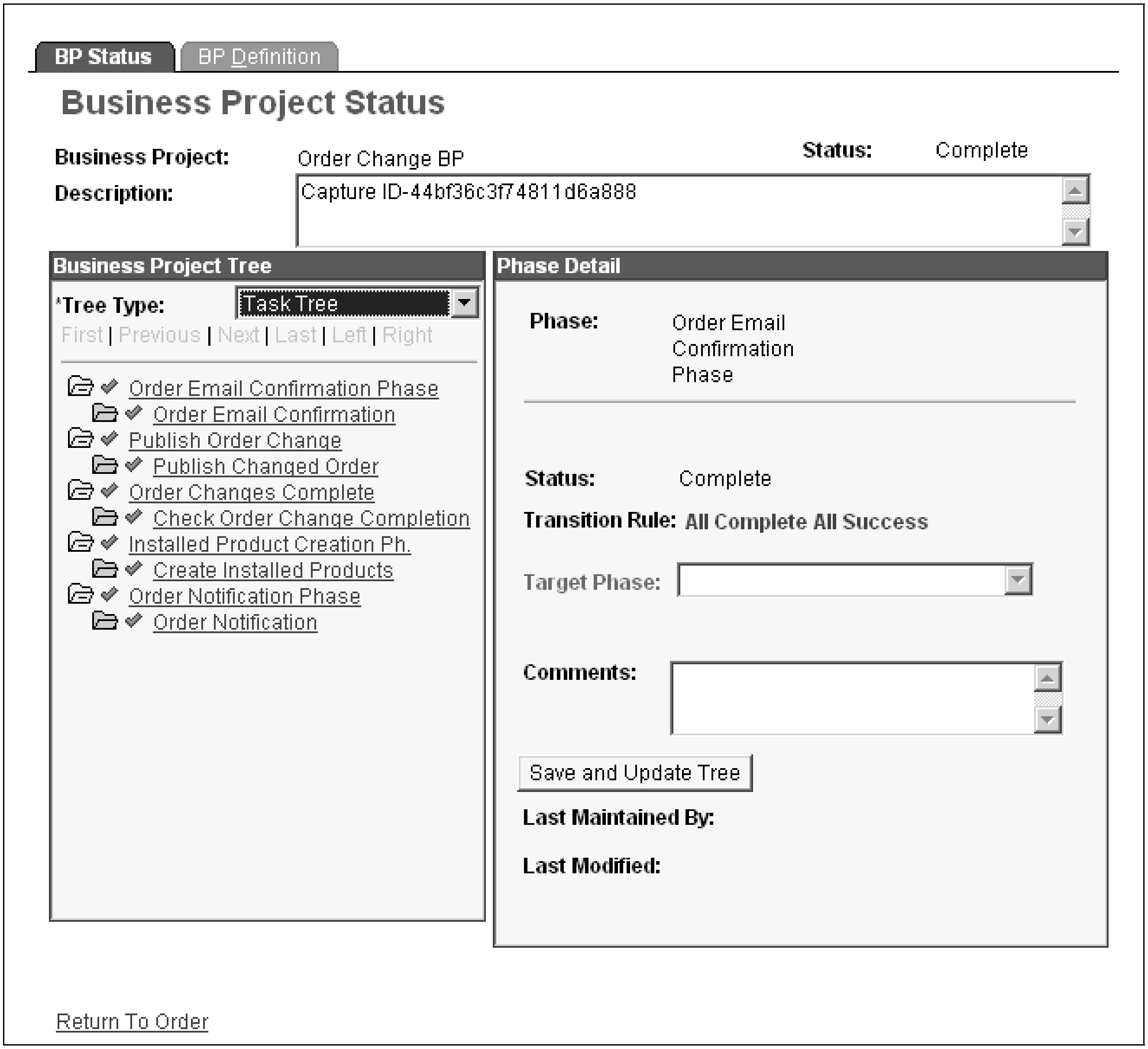
Service Order Creation

Installed products created in an earlier phase may need a service order created. This phase creates service orders for any installed products that are flagged as Service Order Required on the Product Definition page. The service listed on the Product Definition page is used to create the service orders. This phase is the final phase of the business project, and it does not run until the order is completed or canceled.

Note. The Workflow rule RO_Create Service Order, which is the event performed by the CREATE_SO task, runs the Application Engine program RO_CREATE_SO.

Viewing the Order Maintenance Business Project

Access the Business Project Status page.



Business Project Status page

Order Maintenance Business Project Phases

Order Email Confirmation This is the same phase that is used in the Order Capture business project. It provides the current snapshot of the order following order maintenance.

Publish Order Change When the order is to be fulfilled by an external system, this phase publishes the order maintenance details, if the application message CRM_SALES_ORDER_CHANGE is active.

When the PeopleSoft Contracts integratin is in effect, and the order contains service or agreement products, this phase will publish the CONTRACT_TXN application message, if the message is active.

Note. The Workflow rule RO EIP Change Pub, which is the event performed by the PUB_CHG_ORDER task, runs the Application Engine program RO_EIP_CHPUB.

See Chapter 6, "Integrating with Fulfillment and Billing Systems," page 87.

Order Changes Complete

This phase examines the status of the order history (RO_HISTORY) by looking for any change history records with *Open* status. If no open history records are found, this phase exits with a successful completion. If the open history records exist, this phase will wait until it is notified that the changes have been processed.

The Sales Order Change Notice EIP will inform the business project that the requested changes have been processed and will allow this phase to exit with a *Successful* status.

Note. The Workflow rule RO_Check Order Changes, which is the event performed by the CHK_ORDCH_COMPL task, runs the Application Engine program RO_ORDCH_OVR.

Installed Product Creation

The order may contain products that require an installed product, as indicated by the Installed Product page in the Product Definition component. For any order lines that were maintained that require installed products, this phase adds, changes, or deletes the installed products as necessary.

Maintenance actions involved in adding, creating, or deleting installed products include adding new lines to the order, changing the quantity of existing lines on the order, or canceling lines on the order.

In addition, when creating installed products for serialized items, the system creates one installed product for each quantity ordered. For nonserialized items, the system creates a single installed product for the entire quantity ordered on the order line.

Installed products inherit values from the order, such as the customer information, site, order ID, and quantity ordered.

Note. The Workflow rule RO_Create Inst Prod, which is the event performed by the CREATE_IP task, runs the Application Engine program RO_CREATE_IP.

Order Notification

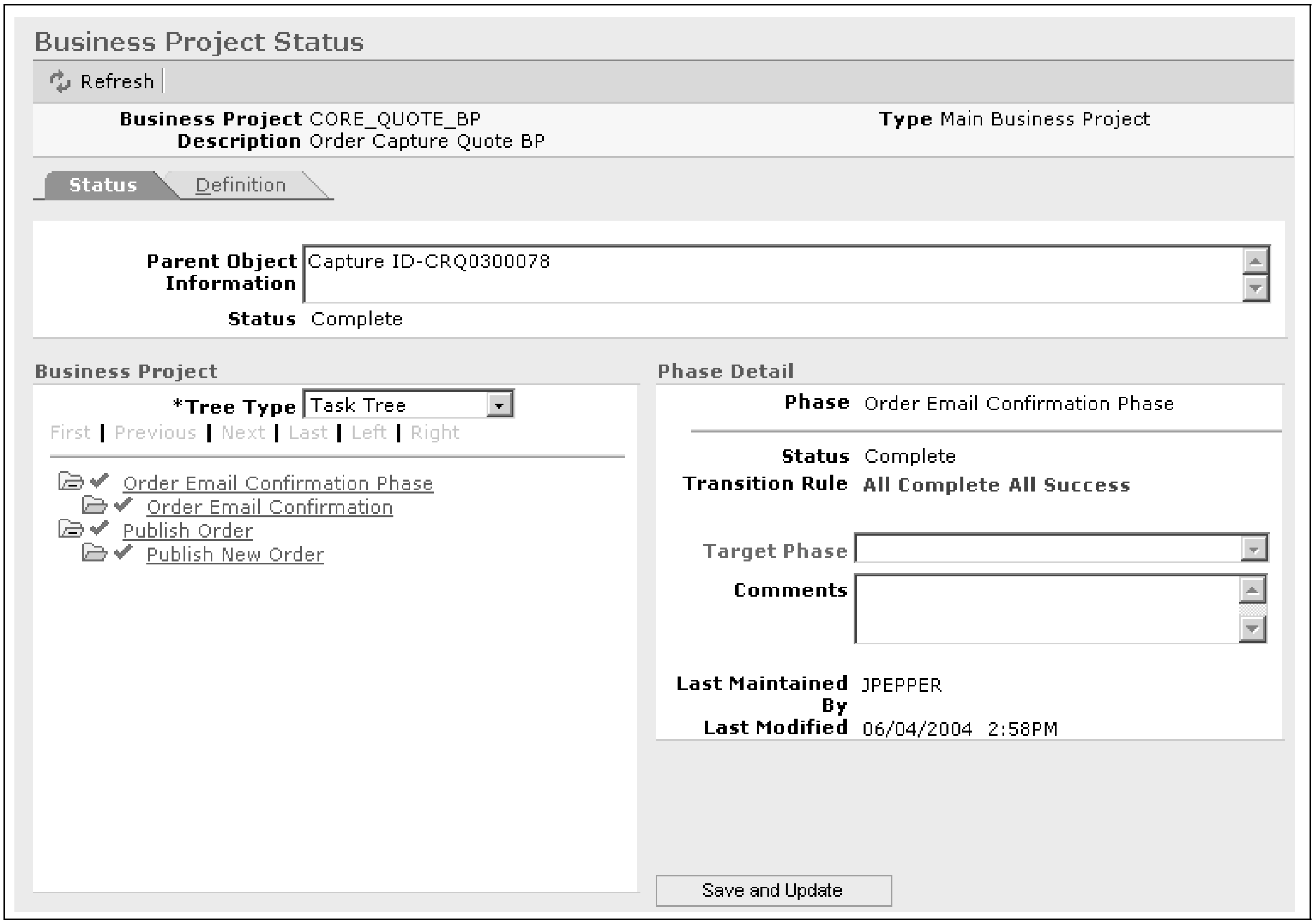
This phase determines the confirmation or rejection of the requested order maintenance by examining the order history (RO_HISTORY). Should notifications be required for the order, as defined in the Order Capture business unit setup, this phase uses correspondence management to create a maintenance confirmation email, and may also create a worklist entry for the customer service representative who entered the most recent order maintenance.

Note. The Workflow rule RO Order Change Notification, which is the event performed by the ORDER_NOTIFY task, runs the Application Engine program RO_ORD_NOTIF.

See Chapter 6, "Integrating with Fulfillment and Billing Systems," page 87.

Viewing the Quote Business Project

Access the Business Project Status page.



Access the Business Project Status page

Phases

Order Email Confirmation

This is the same phase that is used in the Order Capture business project. It provides the current snapshot of the quote.

Publish Order

When using an external fulfillment system, this phase publishes the quote details, if the application message CRM_QUOTE is active.

Note. The Workflow rule RO_EIP Publish, which is the event performed by the PUB_NEW_ORDER task, runs the Application Engine program RO_EIP_PUB.

See Chapter 6, "Integrating with Fulfillment and Billing Systems," page 87.

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, "Using Business Projects," Monitoring Business Projects

CHAPTER 6

Integrating with Fulfillment and Billing Systems

This chapter provides an overview of fulfillment and discusses how to:

- Activate enterprise integration points (EIPs).
- Create autonumbering for orders and quotes.
- Map line statuses.
- Publish order and quote messages.
- Subscribe to order status messages.
- Subscribe to order and quote acknowledgements.
- Subscribe to advanced shipping notices (ASNs).
- Manage externally originating orders.
- Integrate with biilling systems.

Understanding Fulfillment

This section discusses:

- Integration setup.
- EIPs.
- Activation of EIPs for Use with PeopleSoft SCM.
- Order maintenance EIPs.

See Also

Chapter 3, “Setting Up PeopleSoft Order Capture,” Defining Integrations and Mappings, page 57

Chapter 2, “Defining PeopleSoft Order Capture Business Units,” page 15

Integration Setup

The primary setup of PeopleSoft Order Capture integration occurs in the PeopleSoft Order Capture Integration Workbench. The Integration Workbench is designed so that all of your fulfillment and maintenance activity can first be configured there. There are also a few fields that must be populated on the Business Unit Definition page.

EIPs

PeopleSoft Order Capture uses EIPs to transfer information between itself and an order fulfillment system, such as PeopleSoft Order Management or PeopleSoft Inventory. These integration points enable you to configure your PeopleSoft Customer Relationship Management (PeopleSoft CRM) collaborative selling solution to work with any third-party fulfillment system or enterprise application integration (EAI) system.

Note. Our delivered EIPs are configured for integration with PeopleSoft Supply Chain Management (SCM), which provides corresponding EIPs for example, EIPs that publish the information for which PeopleSoft CRM listens. Integration with other fulfillment or EAI systems may require the use of the PeopleTools Integration Broker to build the necessary transformation layer on top of the existing EIPs that PeopleSoft delivers.

PeopleSoft provides the following comprehensive set of EIPs to support the order fulfillment process:

EIP	Description	Message / Transaction Name	Relationships	Type
Get Autonumber	Requests an ID number (to be used for a new order or quote) from your fulfillment system. This EIP is used only when autonumbering is used for order ID assignment.			Outbound / Synchronous
Get Order Status	Requests current order and order line status from your fulfillment system.	SCM_GET_ORD_STATUS and SCM_ORD_STATUS	ORDER_STATUS	Outbound / Synchronous
Get Product Availability	Requests product availability information from your fulfillment system. **Note.** The Get Product Availability EIP gives PeopleSoft CRM users on-demand access to product availability information. Users click the Check Availability button on the order or quote Entry Form page to initiate the transaction.	SCM_GET_PROD_AVAIL and SCM_PROD_AVAIL	None	Outbound / Synchronous

EIP	Description	Message / Transaction Name	Relationships	Type
Publish Order	Sends new orders to your fulfillment system.	CRM_SALES_ ORDER and SALES_CRM_ ORDER_LOAD	ORDER_PUBLISH	Outbound / Asynchronous
Publish Order Change	Sends changed orders to your fulfillment system.	CRM_SALES_ ORDER_CHANGE and SALES_ CRM_ORDER_ CHANGE_LOAD	ORDER_ PUBLISH_CH	Outbound / Synchronous
Publish Quote	Sends new quotes to your fulfillment system.	CRM_QUOTE and SALES_CRM_ QUOTE_LOAD	ORDER_PUBLISH	Outbound / Asynchronous
Receive ASN	Listens for ASNs published by your fulfillment system.	ADVANCED_ SHIPPING_ NOTICE	None	Inbound / Asynchronous
Receive Order Acknowledgement	Listens for order acknowledgements published by your fulfillment system.	SALES_ORDER_ ACKNOWLEDGE- MENT	None	Inbound / Asynchronous
Receive Quote Acknowledgement	Listens for quote acknowledgements published by your fulfillment system.	SALES_QUOTE_ NOTICE	None	Inbound / Asynchronous
Receive Order Change Acknowledgement	Listens for order change acknowledgements published by your fulfillment system.	SALES_ORDER_ CHANGE_ NOTICE	None	Inbound / Asynchronous
Sales Order Status	Listens for order updates published by your fulfillment system.	SALES_ORDER_ STATUS	None	Inbound / Asynchronous

Note. The EIPs listed in the preceding table use PeopleTools Integration Broker messages. Application Message Monitor and Send Master (a PeopleTools testing utility) help you track and test the messages and transformations that make up these EIPs. The Get Autonumber EIP is an exception in that it uses PeopleTools Business Interlink technology.

Activation of EIPs for Use with PeopleSoft SCM

If you are using PeopleSoft SCM, you need to:

- Activate the product, customer, and business unit EIPs.

  These EIPs synchronize the customer, product, and business unit data in the two systems. This synchronization is required when you use PeopleSoft SCM as your fulfillment system.

- Activate CRM transactions and relationships for the PSFT_EP node.
- Activate the SCM EIPs that support the CRM/SCM fulfillment integration.

  The SCM EIPs for Product Availability and Get Order Status are XML links rather than Integration Broker transactions; the activation process for those EIPs is therefore different.

Order Maintenance EIPs

Once an order is captured in PeopleSoft CRM, it is passed to the fulfillment system for processing. Order changes are sent from and received by the fulfillment system by means of appropriate EIPs. The EIPs support integrations with PeopleSoft SCM and other third-party fulfillment systems. The Get Order Status EIP is used as part of the Order Maintenance process when an order is retrieved for maintenance. This insures that PeopleSoft only allows edits on orders and order lines that have not yet been fulfilled.

Note. Order maintenance messages, such as `CRM_SALES_ORDER_CHANGE`, always contain `RO_HEADER` information, and always publish the `RO_INTEGRATION`, `RO_HISTORY`, and `RO_CHARGE` data for the order. The remainder of the `CRM_SALES_ORDER_CHANGE` data only contains order information that has been added or changed.

Order maintenance activities require that customer service representatives (CSRs) have accurate information about changed orders. The following table explains the four EIPs that form the backbone of PeopleSoft Order Capture's order maintenance activities:

EIP Name	Object Name	Description	Type
PUBLISH ORDER CHANGE	SALES_CRM_ORDER_CHANGE_LOAD	Notifies PeopleSoft SCM of an order maintenance request. It is a transformation of the CRM_SALES_ORDER_CHANGE message.	Publish
PUBLISH ORDER CHANGE	CRM_SALES_ORDER_CHANGE	Notifies nonPeopleSoft fulfillment systems of the order maintenance request.	Publish

EIP Name	Object Name	Description	Type
SALES ORDER CHANGE ACKNOWLEDGEMENT	SALES_ORDER_ CHANGE_NOTICE	Notifies PeopleSoft Order Capture when changes are processed in SCM.	Subscribe
SALES ORDER STATUS	SALES_ORDER STATUS	Notifies PeopleSoft Order Capture of the current state of the order in SCM.	Subscribe

Here is a complete list of the SCM EIPs to activate for complete fulfillment functionality:

- `SALES_CRM_ORDER_LOAD`
- `SALES_CRM_QUOTE_LOAD`
- `ADVANCED_SHIPPING_NOTICE`
- `SALES_ORDER_ACKNOWLEDGEMENT`
- `SALES_QUOTE_NOTICE`
- `SALES_CRM_ORDER_CHANGE_LOAD`
- `SALES_ORDER_CHANGE_NOTICE`
- `SALES_ORDER_STATUS`

Activating EIPs

You need to activate your fulfillment EIPs. If you are integrating with PeopleSoft SCM, you need to activate the Order Management and Inventory EIPs listed in the previous section as well.

This section discusses how to activate Integration Broker EIPs.

Activating Integration Broker EIPs

Integration Broker EIPs are inactive when delivered. To activate EIPs, activate each of the following elements:

- *PeopleTools Application Messages:* To activate a message from PeopleTools Application Designer, open the Message Properties dialog box and select the Active check box on the User tab.

  To activate a message subscription, right-click the message subscription and open the Message Subscription Properties dialog box. Select the Active check box to activate the subscription.

- *Integration Broker Transactions:* To activate a transaction, access the Transaction Detail page and set the Status to *Active.*

  You access this page from the Node Definitions component. If you do not first activate the PeopleTools Application Message, you receive a warning message when setting the transaction status to *Active.*

- *Integration Broker Relationships:* To activate a relationship and its transformations, access the Nodes page and set the relationship status to *Active*.

Save the Nodes page, and then access the Trans Modifiers page. For each transformation, select *Edit* to open that transaction and set the status to *Active*. Save and select Return to Transaction List. You access this page from the Relationships component.

Note. Integration Broker transactions and Integration Broker relationships are defined against node, PSFT_EP. If your PeopleSoft Order Management system uses a different node name, then you need to create Integration Broker relationships for the node name being used. Use the Integration Broker Transactions, Node Definitions screen. The copy utility enables the PSFT_EP transactions to be copied to a new node name.

Creating Autonumbering for Orders and Quotes

You can choose either the autonumbering or grid option for your orders and quotes. Autonumbers are controlled by business unit. When you set up autonumbering, you choose the business unit that controls autonumber generation and specify whether autonumbers are generated in the PeopleSoft CRM system or in an external fulfillment system.

Choosing a Business Unit to Control Autonumber Generation

When you define a PeopleSoft Order Capture business unit, you map it to a PeopleSoft Order Management business unit. You can map multiple PeopleSoft Order Capture business units to a single order management business unit. Therefore, to ensure a single source for all numbers that are sent to the order management system, PeopleSoft CRM uses the order management business unit to drive autonumbering. For example, if order capture business unit A is mapped to order management business unit B, then when you create an order in business unit A, its number is generated based on the rules for business unit B.

Note. By design, PeopleSoft SCM cannot use PeopleSoft CRM as its autonumbering master for orders and quotes, only for customers, contacts, and products.

Establishing an External ID Source for Orders and Quotes

You can generate order and quote numbers in the PeopleSoft CRM system or in your order fulfillment system. If the PeopleSoft CRM system does not have an external autonumbering master for orders and quotes, then order numbers are created locally. In this case, be sure that your autonumbering rules include a CRM-specific prefix so that numbers are unique across both your PeopleSoft CRM and order fulfillment system. If your fulfillment system is the autonumbering master, the Get Autonumber EIP fetches order numbers from the external system as orders are created. Because order numbers in both systems come from a common autonumbering definition, this configuration ensures that order numbers are unique across both systems.

Note. The external ID for an order or a quote in PeopleSoft Order Capture is used to identify the order or quote in your fulfillment system. The `RO_INTEGRATION` table stores the external ID data. This table stores the external ID by source code (for example, SCM), thus allowing for multiple external IDs per PeopleSoft CRM order. In addition to storing the external order number, we use this table to store a mapping of sequence numbers on header and line notes.

Notes no longer have sequence numbers in PeopleSoft CRM, but PeopleSoft SCM requires a sequence number to identify a note, which is why we map the information in `RO_INTEGRATION`. In our previous release, `EXTERNAL_ID` was simply a field on the `RO_HEADER` table.

Mapping Line Statuses

Once you send an order to your fulfillment system, that system is responsible for tracking status of the order; CRM integration points bring status information into PeopleSoft CRM to display the status of an order.

Understanding Line Status Mappings

Because different systems can use different order statuses, you must map your fulfillment system's statuses to PeopleSoft Order Capture statuses. The Get Order Status EIP reads the map and converts your fulfillment system's statuses into PeopleSoft Order Capture statuses. For line statuses, *Partial* means that if a part of one line is backordered and part is shipped, it is in fact, partially shipped.

Header status mappings may differ slightly. PeopleSoft delivers a map for all the PeopleSoft Order Management statuses. If you integrate with a different fulfillment system, modify the map accordingly.

Note. PeopleSoft Order Capture maps the status values to node, PSFT_EP, and if you are using a different node name for your Order Management system, you need to enter status mappings against your node name. The node name is read-only once the data is saved.

The following table shows the delivered line status mappings for SCM statuses:

SCM Status	CRM Status	CRM Partial Status
X (Canceled)	1 (Canceled)	1 (Canceled)
Q (Requisitioned)	1000 (Open)	1100 (Partially Open)
U (Purchased)	1000 (Open)	1100 (Partially Open)
B (Backordered)	2000 (Backordered)	2100 (Partially Backordered)
P (Pending)	3000 (Pending)	3100 (Partially Pending)
H (On Hold)	3500 (Fulfillment Hold) **Note.** Holds that originate in PeopleSoft CRM have the status, 9000. This is to differentiate a hold that originated in PeopleSoft CRM (status 9000), from a hold that originated in SCM.	3500 (Fulfillment Hold)
O (In Fulfillment)	4000 (In Fulfillment)	4100 (Partially In Fulfillment)
K (Picked)	5000 (Picked)	5100 (Partially Picked)
C (Closed)	6000 (Shipped)	6100 (Partially Shipped)
S (Shipped)	6000 (Shipped)	6100 (Partially Shipped)

Publishing Order and Quote Messages

When you capture an order or quote in PeopleSoft Order Capture, the system instantiates the CORE_ORDER_BP or CORE_QUOTE_BP business project. Both of these business projects include a task that runs the RO_EIP_PUB Application Engine process, which triggers the Publish Order and Publish Quote EIPs. These EIPs, which consist of the CRM_SALES_ORDER and CRM_SALES_QUOTE messages, make order and quote information available to your fulfillment system. PeopleSoft delivers the Integration Broker transformation rules required to integrate with SCM; integration with other systems requires additional transformation rules.

If you use PeopleSoft Order Management, EIPs receive the transformed messages and enter order data into Order Management staging tables. The orders have a source code of *CRM* and start with a status of *Open.*

Running Batch Jobs in PeopleSoft Order Management (PeopleSoft SCM customers only)

Subsequent to order submission, the PeopleSoft Order Management fulfillment process starts with the OMEC process followed by the OMBACK process; OMBACK moves the data from the staging tables into the order tables. In Order Management, you can set up exclusions to choose which subprocesses within OMBACK to run or skip based on the order source code. Because orders that originate in PeopleSoft CRM already have tax, freight, and pricing information, you should configure OMBACK to skip tax, freight, and pricing calculations for orders with the PeopleSoft CRM source code.

There are fours specific SCM processes you need to run to complete the pre-fulfillment tasks. These consist of:

1. Order Validation Process (OMEC)
2. Order Completion Process (OMBACK)
3. Outbound Acknowledgement (OMEC Outbound)
4. Data Exchange (Data Publish)

Batch Job	Description	Steps
1: Order Validation (OMEC)	When you submit an order, the transaction is loaded into order staging tables. We first need to run the Electronic Commerce SQR process (OMEC), which: • Parses data such as customer information and product information to ensure that it is valid. • Sets system defaults and status flags for subsequent processes. • Loads data into the production order tables (order staging data found to have errors is not loaded into the production tables until the errors have been resolved).	To run the OMEC batch job: 1. In the FDM menu, navigate to Order Management, Electronic Commerce, Validate Staged Orders/RFQs. 2. Add a new Run Control ID. 3. In the Processing Options group box, select the Inbound Order/RFQ Activity check box. **Note.** This will make 2 extra fields (Transaction Type and EIP Control ID) available in the Processing Parameters group box. 4. Leave the remaining 3 “queue” check boxes in Processing Options unchecked. 5. In the Processing Parameters group box, choose the specific (Order Management) Business Unit you specified on the Order Capture Definition 6. Choose the Transaction Type of *PO* (Inbound Sales Order). 7. Leave the EIP Control ID field blank. 8. Click the RUN button. This tells the system to process our orders that are sitting in the staging tables. You will automatically be taken to the Process Scheduler Request. 9. Choose the Server Name, *PSNT,* and then click *OK*. You will return to the Electronic Commerce page. 10. Click the Process Monitor link and examine the Run Status of your job. You are looking to see the status change from *Posting* to *Success*. Click Refresh repeatedly to see if the status has changed.

<table>
<tr><th>Batch Job</th><th>Description</th><th>Steps</th></tr>
<tr>
<td>2. Order Completion (OMBACK)</td>
<td>The Order Completion process (OMBACK):
• Applies the agreement, sold to customer, ship to customer, bill to customer, and order group defaults to the order header and order lines.
• Performs order pricing, and does tax defaulting and tax calculations.
• Processes estimated shipments and external freight calculations.</td>
<td>To run the OMBACK batch job:
1. Navigate to Order Management, Quotes and Orders, Process Orders, Order Completion
2. Add a new Run Control ID.
3. Select the same Business Unit you chose previously in the From Business Unit field.
Note. The To Business Unit field automatically populates with the same Business Unit.
4. In the From Order Number and To Order Number fields, select the entire range of your pending orders, and then click Run.
Note. You will automatically be taken to the Process Scheduler Request.
5. As with the previous job, choose the Server Name, PSNT, then click OK..
6. Click the Process Monitor link, and examine the Run Status of your job. You are looking to see the status change from Posting to Success. Click Refresh repeatedly to see if the status has changed.
Note. You can now view orders in the PeopleSoft SCM system.</td>
</tr>
</table>

Batch Job	Description	Steps
3. Outbound Acknowledgement (OMEC Outbound)	The Outbound Publish process (OMEC Outbound) puts entries in the order acknowledgement queue, which are subsequently used to publish order acknowledgements to PeopleSoft CRM.	To run the OMEC batch job: 1. In the FDM menu, navigate to Order Management, Electronic Commerce, Validate Staged Orders/RFQs. 2. Select the Run Control ID you created when you ran OMEC. 3. 3. Uncheck the Inbound Order/RFQ Activity check box, and check the Acknowledgement Queue. 4. Click Run, and you will go to the Process Scheduler Request. 5. Select the *PSNT* Server Name, and click *OK*. 6. Click the Process Monitor link on the Electronic Commerce page. 7. Examine the Run Status of your job. You are looking to see the status change from *Posting* to *Success*. Click Refresh repeatedly to see if the status has changed.

Batch Job	Description	Steps
4. Data Exchange (Data Publish)	The Data Exchange job is used to publish the Sales Order Acknowledgement message to PeopleSoft CRM, using the information from the order acknowledgement queue.	To run the Data Publish job: 1. In the FDM menu, navigate to Data Exchanges, Publish Outbound Message. 2. Select your existing Run Control ID. 3. On the Publish Outbound Message screen, there are a variety of check boxes. Select the Sales Order Acknowledgement check box. The Sales Order Acknowledgement will change to a hyperlink. Click on this link. 4. On the Order Acknowledgement Message Selection Criteria page, first choose your Business Unit and then select *CRM* as the Source Code. Leave everything else blank. **Note.** In the Outbound Messages Selected group box, *Order Acknowledgement Queue* is pre-selected. 5. Click *OK*. This takes you back to the Publish Outbound Message page. Click *Run*. 6. Enter *PSNT* as the Server Name, and click *OK*. Then click on the Process Monitor link. If the orders are *In Process*, this means that you have run the entire cycle of SCM batch jobs successfully.

Note. If you navigate to Order Management, Quotes and Orders, Create/Update Order, and choose your business unit, you can search for any order and see that a specific order is *In Process.*

Understanding the Transformation Process

PeopleSoft delivers transformation rules that you can use when sending information to PeopleSoft Order Management. The Application Engine program that performs the transformation has three stages:

1. It evaluates products and packages that were ordered and transforms order lines as follows:
    a. Service products are not sent at all, but other products are sent exactly as defined in the order line
    b. Product packages are sent as packages, as there is a 1 to 1 mapping of information with PeopleSoft Order Management here. However, lightly configured packages are broken into multiple order lines and packages contained in other packages are broken into multiple order lines. Each product included in the package within a package is given its own order line. For example, if Package

1 consists of product A and Package 2, while Package 2 consists of products B and C, then an order line for Package 1 is broken into three order lines: one each for products A, B, and C.

Note. If you use PeopleSoft SCM and you set pricing at the package level (rather than the component level), no pricing details are sent; each component is sent with a price of zero. Therefore, if you are a SCM customer, pricing for dynamic packages needs to be at the component level.

2. It performs an XSL transformation to structure the EIP data for Order Management.
3. It adds SCM customer information (for example, bill to and ship to addresses) to the order data by looking at the tables (RB_INT_CUSTOMER and RB_INT_CUST_ADS) that map PeopleSoft CRM customer data to SCM customer data. This mapping is maintained by the Customer Sync EIP.

Note. If you use PeopleSoft SCM as your fulfillment system, you must keep customer and product data synchronized in the two systems. The Customer Sync and Product Sync EIPs manage this synchronization.

Understanding the Message Content

This section describes certain parts of the order and quote messages published by CRM. For more details about the messages, refer to the EIP catalog and the message definitions. Order and quote messages published by PeopleSoft CRM include:

- *EXTERNAL_ID field from the Integration table RO_INTEGRATION:* This is the ID that maps to the order or quote number in the fulfillment system.
- *Order Management business unit:* This is the business unit that is associated with the PeopleSoft Order Capture business unit (on the Order Capture Business Unit Definition page).
- *An order source code of "CRM":* If PeopleSoft Order Management is your fulfillment system, this code affects certain processes. For example, Order Management allows PeopleSoft CRM orders to be price protected.
- *Order line numbers:* PeopleSoft Order Capture expects the fulfillment system to carry the line numbers through the entire fulfillment process. For example, if an order has five lines and lines two, four, and five are sent to PeopleSoft Order Management, then the order in Order Management has three order lines numbered 2, 4, and 5. This enables order line tracking even when different order lines are sent to different fulfillment systems.
- *Pricing:* This includes order-level discounts, shipping, and tax information.
- *A price protection setting:* This prevents Order Management from altering price information.
- *Order level discount information.*.
- *Giveaway information:* The `ORDER_LINE_TAG` field ties a giveaway to a specific order line.
- *Credit card information:* PeopleSoft stores encrypted credit card data, which is what the message sends.
- *Quote messages:* Quotes include additional information specific to quotes, such as the quote due date and expiration date.

Subscribing to Order Status Messages

In PeopleSoft SCM, the Data Exchanges > Publish Outbound Message utility enables you to publish a snapshot of the order as it exists in the SCM system. The Sales Order/Quote Status option enables you to publish orders by business unit, source code (for example, CRM), customer, order type, order number range, order date range, and order change date range. Also, you can choose to publish orders for specific order status values.

PeopleSoft Order Capture subscribes to these SALES_ORDER_STATUS messages to provide a method for synchronizing changes made to the order in SCM, so that the order reflects the same information. For example, if an order is maintained in SCM, and a new order line is added, the SALES_ORDER_STATUS message delivers that order and its new line to PeopleSoft Order Capture.

Also, as part of the SALES_ORDER_STATUS processing, the current order status is updated, just as the Get Order Status EIP provides.

If the SALES_ORDER_STATUS message contains orders that did not originate in PeopleSoft Order Capture (for example, EDI orders), then order header information is created so that these orders are viewable through the Order Search screen. When users drill down for further details, they are transferred to the uniform resource locator (URL) specified in the Source Code definition for that order. If no URL is specified, then the user is only able to view the header information for that order.

Getting On-Demand Status Updates

The Get Order Status EIP provides on-demand status updates. Users invoke the update by clicking the Refresh button on the Order Tracking page.

The Get Order Status EIP updates:

- The status for individual order lines.
- The scheduled shipping date and the scheduled arrival dates.

The EIP also updates the RO_LINE_HIST table, which stores a history of line statuses. You can query this history, but it does not appear on any PeopleSoft Order Capture pages.

Subscribing to Order and Quote Acknowledgements

In PeopleSoft SCM, the Batch Publish job publishes regular acknowledgments (the SALES_ORDER_ACKNOWLEDGEMENT and SALES_QUOTE_NOTICE messages) and change acknowledgements (the SALES_ORDER_CHANGE_NOTICE message) for orders that come from electronic commerce channels—that is, for orders that are entered into the SCM staging tables.

Note. Change acknowledgements are not published for orders that originate within PeopleSoft Order Management.

In PeopleSoft CRM, the Receive Order Acknowledgement and Receive Quote Acknowledgement EIPs subscribe to SCM messages, while the Receive Order Change Acknowledgement EIP subscribes to the change acknowledgement message. When PeopleSoft CRM receives a change acknowledgement, the order status and change history are updated, while rejected order changes are rolled back. When PeopleSoft Order Capture receives a regular order acknowledgement, it updates the order header status to In Process, and it sets the order line statuses to the line status map that you established in the Integration Workbench. When an SCM order line status is set to Open, and this is the status that the acknowledgement message sends, Order Capture maps this to a status of In Fulfillment.

Change History was created with a status of *Open* when order changes were initially submitted. When the change acknowledgement is processed, changes that were accepted by the Fulfillment system are marked Confirmed, and changes that are not accepted are marked Rejected. When a requested change is rejected, the original values on the order are restored back to their values prior to the change. For example, if a quantity on an order line was increased from 1 to 2, and that change is rejected because the order line had shipped, the quantity is restored to 1 following the processing of the change acknowledgement.

Change Acknowledgement updates order statuses just as the Get Order Status EIP does, providing a current snapshot of the order status at the time the Change Acknowledgement was published. Order statuses are set based on the status mapping that you establish. The Change Acknowledgement also creates order notifications based upon the setup for the Order Capture business unit.

Notifications may be specified to go to the customer, the CSR, both, or none, based on the acceptance of the changes that were requested. In addition, when notifications are specified for the CSR, the notification is sent based on the CSR’s preferred notification setting as found in the Worker component, which can be email, worklist, or both. Notifications to the customer are sent to the email address of the contact listed on the order, or for a consumer order, the consumer’s email address. If there is no email specified for the contact or consumer, notifications cannot be sent to the customer. Email notifications show the changes requested, along with the acceptance status of Confirmed or Rejected, and display the order following the Change Acknowledgement processing. A CSR’s Worklist notification is a link to the order in the Order Capture Worklist.

Subscribing to ASNs

PeopleSoft Inventory publishes ASNs that provide the number of items that have shipped for a specific order line. These messages do not contain status information about items that have not shipped.

The Receive ASN EIP subscribes to the ASN message.

When PeopleSoft CRM receives an ASN, it updates statuses using the following logic:

1. The shipped quantity from the ASN is added to any previously recorded quantity shipped.
2. If the total shipped quantity is greater than or equal to the quantity ordered, the line and all items in the line have a status of Shipped.
3. If the total shipped quantity is less than the quantity ordered, the system assumes that the items with the highest status were shipped and adjusts statuses accordingly.

Since status numbers increase as an item moves through the fulfillment process, the unshipped item with the highest status is considered the most likely item to have been shipped.

For example, consider the following status update history for an order line consisting of ten items:

Time	Message	Status From Message	Complete Status
10:00 am	Acknowledgement	10 In Fulfillment	10 In Fulfillment
1:00 pm	ASN	5 Shipped	5 Shipped 5 In Fulfillment

Time	Message	Status From Message	Complete Status
2:00 pm	Order status	5 Shipped 2 Backordered 3 On Hold	5 Shipped 3 On Hold 2 Backordered
5:00 pm	ASN	3 Shipped	8 Shipped 2 Backordered

At 10:00 am, the order was submitted. An order acknowledgment message caused the system to set the status of all ten items to In Fulfillment.

At 1:00 pm, an ASN message indicated that five items had been shipped. Status changes for these five items and the remaining five items keep the status In Fulfillment.

At 2:00 pm, the order status message provided a complete status that replaced the previous status information.

At 5:00 pm, an ASN message indicated that three more items were shipped. Although the message does not specify which items were shipped, the system makes the following adjustments:

- The system adjusted the quantity shipped: the three additional shipped items are added to the five that were already known to have been shipped.
- Because the On Hold (status number 9000) has a higher status number than Back Ordered (status number 2000), the system assumed that the three items on hold were the ones that were shipped and modified the status accordingly.

Note. If an ASN is received for any component of a static package, the entire package is considered to have been shipped. Also, when any line on the order is marked with Shipped status, the Order Header is marked as Complete.

Managing Externally Originating Orders

This section explains how PeopleSoft Order Capture handles externally originating orders, and explains how to specify URLs for tracking purposes.

Handling External Orders

PeopleSoft Order Capture uses the Receive Orders EIP to create PeopleSoft CRM records for orders that originate in your fulfillment system (or any other external system). Unlike the Get Order Status EIP, the Receive Orders EIP does not attempt to match the external system’s order numbers with Order Capture order numbers. Each Order Capture business unit definition specifies the source code that is used for orders created in the PeopleSoft CRM system. Orders that are entered by the Receive Orders EIP have a source code provided by the external system. Make sure that the source codes are different for orders that originate internally and externally.

Note. If a user attempts to view an order with a source code other than the one specified in the business unit definition, the system reroutes the user to a page that you specify. If you haven't specified a URL, then you see the header information in order tracking but you can't click on the order for details.

You can specify different target pages to be used when accessing orders in the internal Order Tracking page and the external (self-service) Order Tracking page. The system marks orders that originate outside of CRM, and if you provide the system with the URL for the external system, then a user who attempts to view such an order in the CRM order tracking pages is automatically redirected to the system where the order originated.

Integrating with Billing Systems

PeopleSoft Order Capture integrates with PeopleSoft Transaction Billing Processor to allow access to standard billing functionality such as revenue recognition structure, billing cycle details, and account rules for applying revenue to the General Ledger. It also allows the enterprise to apply surcharges and taxation to billable amounts and process them through user-defined invoice formats.

Setting Up an Integration to PeopleSoft Transaction Billing Processor

This integration is detailed in a chapter in the Services Foundation Peoplebook.

See Also

PeopleSoft Transaction Billing Processor 8.8 PeopleBook.

PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook, "Transaction Billing Processor Integration"

Using the PeopleSoft Transaction Billing Processor Integration from PeopleSoft Order Capture

If a contract doesn't exist, the PeopleSoft Order Capture transaction triggers a new contract to be created in the Billing system. Pricing is done by the Enterprise Pricer through PeopleSoft Order Capture. For agreement products, pricing is also done by the Service Pricing routines. Peoplesoft Order Capture sends the total for each order line containing a service or agreement product to the PeopleSoft Transaction Billing Processor.

Note. PeopleSoft Transaction Billing Processor integrates with PeopleSoft Order Capture and enables you to create invoices and recognize revenue for *service* products. However, PeopleSoft Order Capture sends standard products through the integration to PeopleSoft Order Management. PeopleSoft Order Capture uses PeopleSoft Proposal Management to send engagement-type services.

PeopleSoft Order Capture only sends transactions that are ready to be billed to PeopleSoft Transaction Billing Processor. PeopleSoft Order Capture also sends tax parameters, which are used to retrieve the sales and use tax or VAT rate.

See Also

PeopleSoft Transaction Billing Processor 8.8 PeopleBook.

CHAPTER 7

Working with PeopleSoft Service Management

This chapter provides overviews of PeopleSoft Service Management, service management EIPs and business projects, and discusses:

- Working with PeopleSoft Service Management.
- Maintaining service.

Understanding Service Management

The service management functionality provides the interface for the customer service representative (CSR) as well as the self-service user to initiate changes such as addition, replacement, or removal of features to an existing service. It also provides the interface to perform changes at the service level, such as disconnect service, suspend, and resume service.

Service management provides the infrastructure to flow the submitted orders through to the appropriate operations support system applications for provisioning and activation using product actions and product-specific business projects.

Product Actions determine what actions are allowable for specific services and service features. Product Service Feature Relationships provide valid features that can be added to an existing service.

When a customer initially orders service, the service and service features are created in a two-tier hierarchy in the Installed Products component. Service management is the component that is used to change those features associated with an installed service.

Once service has been established, there are several typical transactions and business processes required to manage that service.

The Maintain Service component involves the following service actions:

Service Change	Definition	Example
Change Service Features	An order that changes the features associated with a pre-existing service. This order can be used to add, replace, or remove service features. This order cannot be used to change one service for another, such as wireless for wireline.	Existing wireless customer wants to replace a 500 minute plan with 1000 minute plan. He also wants to cancel the call forwarding feature which he never uses.

Service Change	Definition	Example
Disconnect Service	An order that cancels a pre-existing service. All features related to the service are also canceled. Service features cannot be disconnected by themselves.	Customer wants to switch service providers. He calls to cancel existing service.
Suspend Service	An order that changes the status of a pre-existing service to *Suspended.* Service features cannot be suspended.	Customer is going away for a long vacation and wants to suspend the service.
Resume Service	An order that returns the status of an existing service to *Active.* Resuming service is accomplished by entering an End Date in the Suspend Service line detail.	Customer returns from vacation and wants the service resumed.
Renew Service	An order that extends the ending date for a service that is to expire. The service will be repriced during this transaction.	Customer has a subscription to a newspaper that is due to end next month. Customer calls to extend the subscription for another six months.
Cancel Service	An order that sets the ending date for a service, and sets the status of the service to *Cancelled.* This would end any recurring charges for the service.	Customer has a monthly lawncare service and wishes to terminate the service because he is moving.

Understanding Service Management EIPs and Business Projects

This section discusses:

- Adding service.
- Changing service.
- Suspending service.
- Resuming service.
- Disconnecting service.
- Renewing service.
- Canceling service.
- Business projects.

Add Service

When a CSR or customer places an order for a new service, the add service message gets published to the billing system through the TELCO_NEW_ORDER business project (phase: Telco Add Services).

Category	Description
EIP	Add Service
Request Message	RBT_NEWSRVC_MSG
Message Type	Outbound Asynchronous
Message Called From	Service Management Component
Channel Name	RBT_SERVICEMGMT_CHNL
Configuration Parameter Used	RBTSERVICE

Change Service

When a CSR or self-service user changes (that is, add, remove or replace) service features of a service in the CRM system, the corresponding change service message gets published to the billing system through the TELCO_CHGSVC business project (phase: Change Services).

This EIP cannot be used to exchange one service for another, such as wireless for wireline.

Category	Description
EIP	Change Service
Request Message	RBT_ADDSRVCFT_MSG (add service feature) RBT_REMOVESRVCFT_MSG (remove service feature)
Message Type	Outbound Asynchronous
Message Called From	Service Management Component
Channel Name	RBT_SERVICEMGMT_CHNL
Configuration Parameter Used	RBTSERVICE

Suspend Service

Only CSRs are able to suspend services. When a CSR suspends a service in the CRM system, the suspend service message gets published to the billing system through the TELCO_SUSPEND business project (phase: Telco Suspend Service).

Category	Description
EIP	Suspend Service
Request Message	RBT_SUSPENDSRVC_MSG
Message Type	Outbound Asynchronous
Message Called From	Service Management Component
Channel Name	RBT_SERVICEMGMT_CHNL
Configuration Parameter Used	RBTSERVICE

Resume Service

Only CSRs are able to reinstate services. When a CSR resumes a service in the CRM system, the resume service message gets published to the billing system through the TELCO_RESUME business project (phase: Telco Resume Service).

Category	Description
EIP	Resume Service
Request Message	RBT_RESUMESRVC_MSG
Message Type	Outbound Asynchronous
Message Called From	Service Management Component
Channel Name	RBT_SERVICEMGMT_CHNL
Configuration Parameter Used	RBTSERVICE

Disconnect Service

Customer needs to contact a CSR to terminate services. When a disconnect service request is submitted in the CRM system, the disconnect service message gets published to the billing system through the TELCO_DISCONN business project (phase: DisSvc Disconnect Services).

Category	Description
EIP	Disconnect Service
Request Message	RBT_REMOVESRVC_MSG
Message Type	Outbound Asynchronous
Message Called From	Service Management Component
Channel Name	RBT_SERVICEMGMT_CHNL
Configuration Parameter Used	RBTSERVICE

Note. For service management-related EIPs, a separate inbound asynchronous message (Message Name: RBT_IPSTATUS_MSG; Channel Name: RBT_NEWACT_CHNL) is needed and that will be used to update the status of service records within the CRM system after status change.

Renew Service

Customer needs to contact a CSR to renew services. When a renew service request is submitted in the CRM system, the generic service management order message gets published and subsequently transformed into the contract transaction message through the SM_ORDER_BP business project. In addition, the SM_RENEW_SVC business project runs to perform the updates to the service installed product and service agreements.

Category	Description
EIP	Contract Transaction
Request Message	CRM_SERV_MGT_ORDER (generic service management), CONTRACT_TXN (billing transaction processor)
Message Type	Outbound Asynchronous
Message Called From	Service Management Component
Channel Name	CONTRACT

Cancel Service

Customer needs to contact a CSR to cancel services. When a cancel service request is submitted in the CRM system, the generic service management order message gets published and subsequently transformed into the contract transaction message through the SM_ORDER_BP business project. In addition, the SM_CANCEL_SVC business project runs to perform the cancel to the service installed product and service agreements.

Category	Description
EIP	Contract Transaction
Request Message	CRM_SERV_MGT_ORDER (generic service management), CONTRACT_TXN (billing transaction processor)
Message Type	Outbound Asynchronous
Message Called From	Service Management Component
Channel Name	CONTRACT

Business Projects

The table shows business projects associated with service management:

Business Project	Details
Telco Change Service	This Business Project is instantiated when the Service Type is *Change Service*.
Telco Suspend Order BP	This Business Project is instantiated when the Service Type is *Suspend Service*.
Telco Resume Order BP	This Business Project is instantiated when the Service Type is *Resume Service*.
Telco Disconnect Order BP	This Business Project is instantiated when the Service Type is *Disconnect Service*.
Service Mgmt Cancel Service	This Business Project is instantiated when the Service Type is *Cancel Service*.

Business Project	Details
Service Management Order BP	This Business Project is instantiated when the service management order is submitted.
Service Mgmt Renew Service	This Business Project is instantiated when the Service Type is *Renew Service.*

Working with Service Management

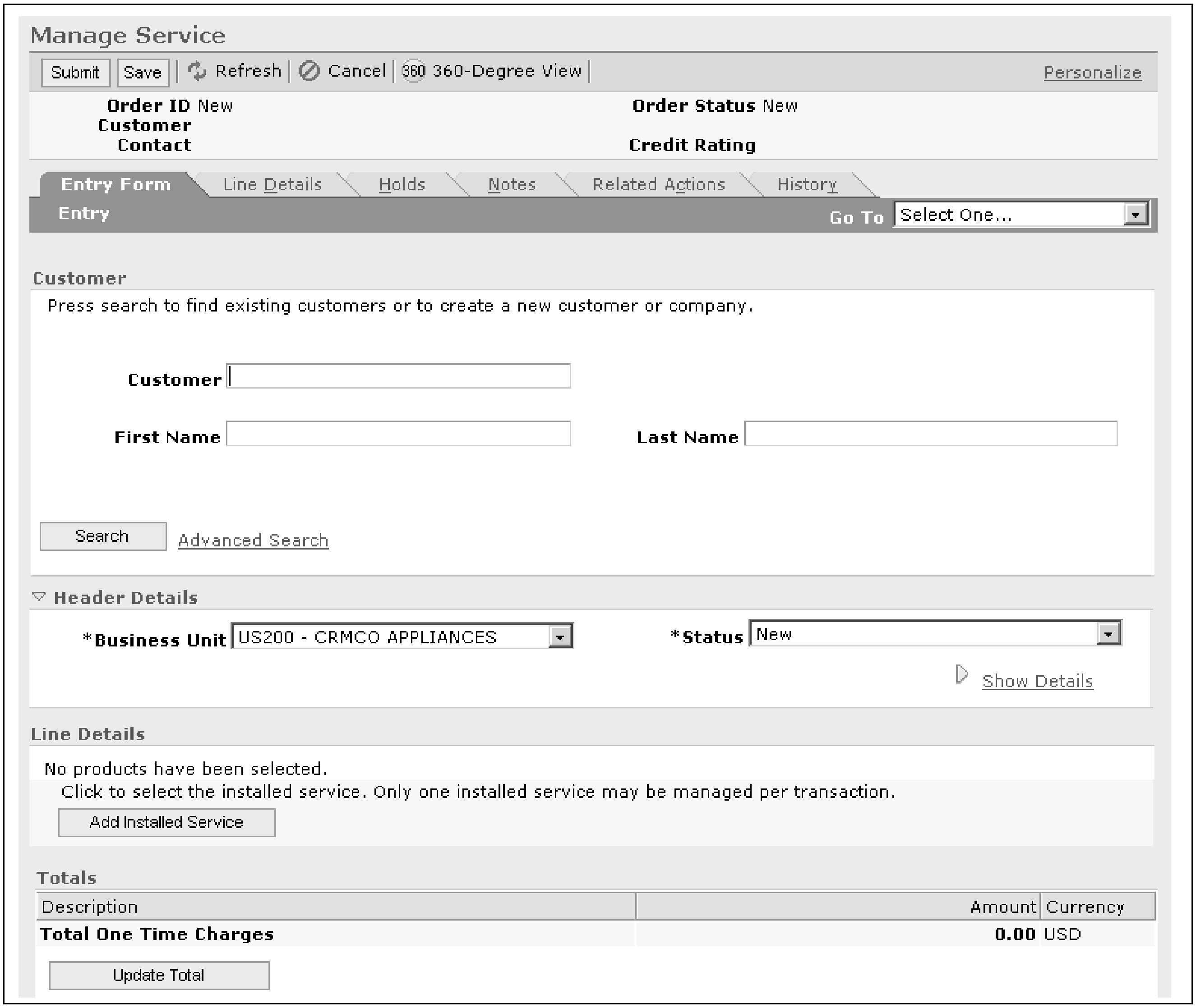
This section discusses the pages used to manage services.

Pages Used to Manage Services

Page Name	Object Name	Navigation	Usage
Manage Service - Entry Form	RO_FORM	• Service Management, Maintain Service • Service Management, Start Service • Service Management, Transfer Service • Service Management, Stop Service • Service Management, View Service Management Order	Use this page to manage customer service requests. You can change, suspend, resume, or disconnect services.

Maintaining Service

Access the Manage Service - Entry Form page.



Manage Service - Entry Form page

See Chapter 8, "Managing Orders and Quotes," Creating Orders or Quotes, page 124.

CHAPTER 8

Managing Orders and Quotes

This chapter provides an overview of PeopleSoft Order Capture and discusses how to:

- Personalize PeopleSoft Order Capture.
- Create orders or quotes.
- Create configurations.
- Enter shipping, payment, and billing information.
- View price adjustments.
- Add notes.
- View summaries.
- Manage holds.
- Maintain orders.
- View related actions.
- View history.

Understanding PeopleSoft Order Capture

This section lists common elements and discusses:

- PeopleSoft Order Capture functionality.
- Hotkeys.
- PeopleSoft Order Capture access.
- Delivered User IDs and User Roles.
- Support for Industry-Specific Dynamic Events.
- Correspondence Generation.

Common Elements Used in This Chapter

Functional buttons in the header and footer toolbars on each PeopleSoft Order Capture page are available to the customer service representative (CSR).

Functional Buttons in the Header or Footer

The following buttons and links provide one-click functionality for PeopleSoft Order Capture:

Submit
Click to save and submit the order or quote for processing.

Save
Click to save the order or quote in its current state.

Validate
Click to validate the quote or order and fires all the hold conditions.

Upsell
This appears if a marketing campaign is associated with the consumer or company that has been identified on the quote or order, and there is an upsell possibility.

Convert To Bulk
Click to change the current order to a bulk order. Bulk orders are used as a template to create multiple orders.

Note. Convert To Bulk is only available for orders.

Add
Click to initiate a new quote or order.

Search
Click to access the quote and order search page.

Cancel
Click to cancel the current quote or order.

Note. Cancel is only available when edits are allowed.

Refresh
Click to refresh the view for the current page. This also refreshes the view of an *Open* or *In Process* order that is in the fulfillment cycle with a live status update if the EIP is enabled.

Copy to Quote
Click to convert a quote to an order or copy an order to a new quote.

Note. You cannot convert expired quotes to orders.

Clone
Click to clone the current order or quote and create a copy of the current instance.

Maintenance
Click to begin order maintenance activity for an order submitted to fulfillment, or to begin revision of an open quote.

Note. Maintenance appears only after you submit a quote or order.

Send Correspondence
Click this button to activate print or email correspondences.

Note. Send Correspondence appears after you submit a quote or order.

360-Degree View
Click to launch the 360-degree viewer.

Personalize
Click to access the Personalize Toolbar page, where you can:

- Select which buttons to display.
- Organize the order of the buttons.
- Select to display or hide the buttons and text.

Display-Only Text in the Header Toolbar

PeopleSoft Order Capture displays the following identifiers in the toolbar:

Order ID/Quote ID

PeopleSoft Order Capture sequentially generates order and quote IDs based on Automatic Numbering options or by an ID drawn from the Capture Type Workbench setup.

Order/Quote Status

PeopleSoft Order Capture delivers six statuses: *Open, Pending, In Process, Hold, Complete,* or *Canceled.*

Note. You can add or modify statuses that are applicable to your business process in the Setup Workbench.

Customer

This is a Sold To company or Sold To consumer.

Customer Value

This is a configurable data element from the Customer Data Model that displays a specific customer demographic.

See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, "Defining Company Business Objects".

Contact

This is a Sold To contact for the company or consumer.

Credit Rating

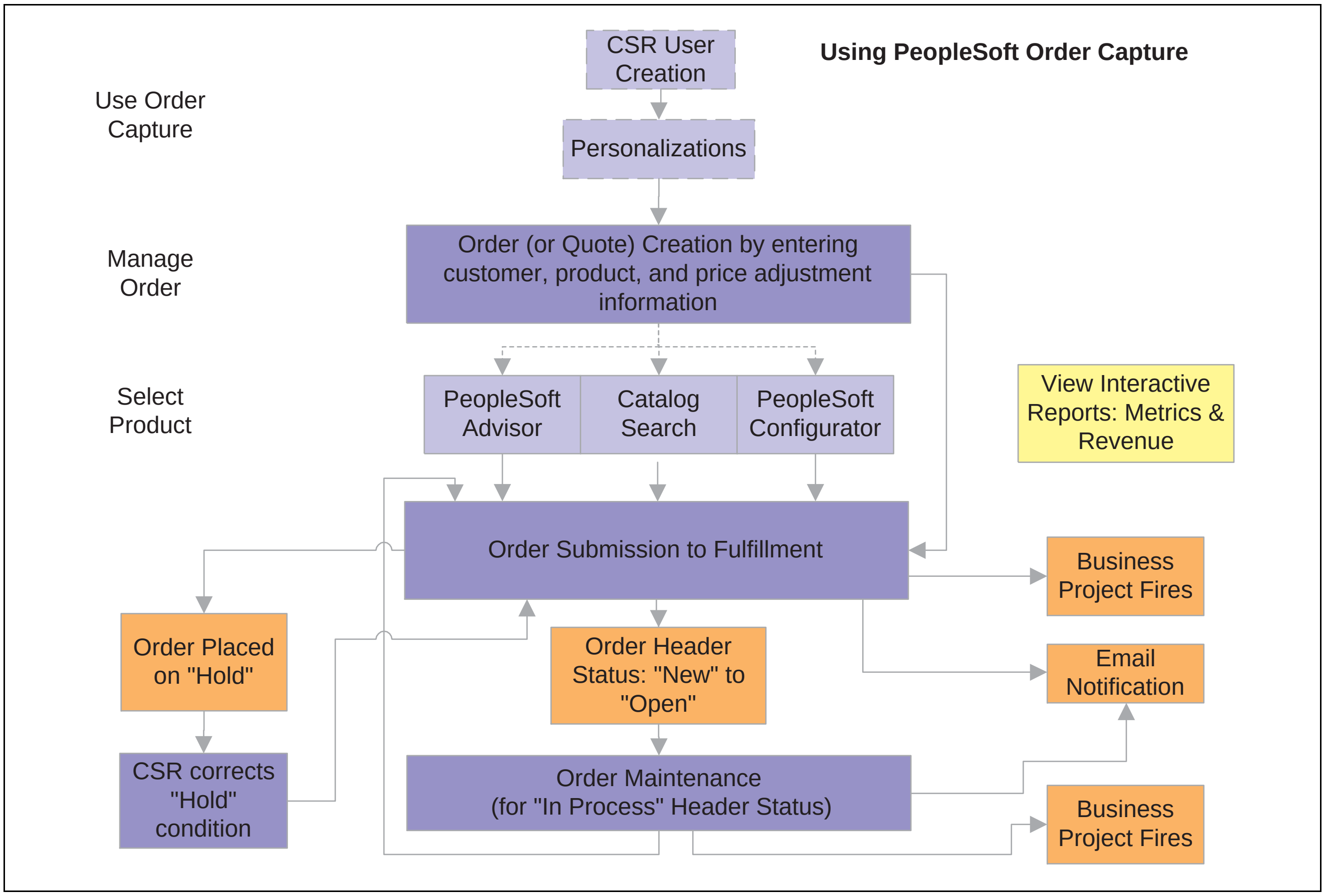
Displays the customer's credit rating based on what is in the Customer Data Model.

See Also

Chapter 3, "Setting Up PeopleSoft Order Capture," Defining Header Statuses, page 36

PeopleSoft Order Capture Functionality

The following graphic identifies the functionality available to PeopleSoft Order Capture CSR:



Using PeopleSoft Order Capture

PeopleSoft Order Capture is designed to enable easy order management for the CSR. The Order Capture system seeks to maximize system resources so as to minimize the CSR's energies. For example, PeopleSoft Order Capture:

- Delivers pages that facilitate rapid order capture.
- Provides icons, hotkeys, and tab ordering to reduce the number of keystrokes and mouse clicks.
- Limits the number of page refreshes (or server trips) so that there is minimal waiting time, if any.
- Defaults known information whenever possible.
- Utilizes a header toolbar that contains functional icons and pertinent display-only order information.
- Provides personalization capabilities to the CSR, whereby the CSR or system administrator can define the preferred means of data entry of product information into the order.
- Enables the CSR to easily personalize orders and quotes.

Hotkeys

PeopleSoft Order Capture simplifies the order entry process by providing the following hotkeys at the header level and the line level.

Use the following hotkeys for header level activity.

Alt + hotkey	• *1* - Save

- *0* - Refresh
- *U* - Upsell
- *V* - Convert
- *C* - Clone
- *M* - Maintain
- *A* - Add Product
- *S* - Update Mode

PeopleSoft Order Capture Access

There are various channels through which a PeopleSoft Customer Relationship Management (PeopleSoft CRM) CSR or sales representative can create or view orders and quotes.

Direct Navigation

A CSR can access PeopleSoft Order Capture directly by selecting Orders and Quotes on the PeopleSoft CRM menu. From within Orders and Quotes, the main options are:

- Add Quote.

  Create a new quote. This option takes you directly to the quote form for quick and direct access.

- Add Order.

  Create an new order. This option takes you directly to the order form for quick and direct access.

- Add Bulk Order.

  Create a bulk order. This option takes you directly to the bulk order form and allows you to select multiple recipients that will receive an order.

- Search Orders and Quotes.

  Search to find an existing order or quote. This option provides direct access to a search component to find an existing order or quote. From there, you can find the orders that you are looking for and access those orders for inquiry or maintenance purposes.

- Find Products.

  Search or browse for a specific product within a specific catalog or across all catalogs.

From PeopleSoft Sales

Sales representatives can quickly and seamlessly navigate to quote or Order Capture from the Products section of the Leads or Opportunities page in PeopleSoft Sales. They can specify a product and then navigate directly to the Entry Form within PeopleSoft Order Capture. Customer and product information relevant to Order Capture then pre-populates from the lead or opportunity to the corresponding order and quote entry fields.

From the 360-Degree View

The 360-degree view of the customer also allows for order and quote entry. CSRs can select the Order/Quote value from the Add Transaction field in Interaction Manager, which takes them directly to the Add a New Order or Quote Capture page in PeopleSoft Order Capture. Known values from the 360-degree view pre-populate the main order entry page.

CSRs can also view recent orders and quotes from their workspaces in Interaction Manager. CSRs see each of the following, by default:

- Order ID/Quote ID.
- Date of order/quote creation.
- Order/quote status.

CSRs can navigate to an existing quote or order by using a link on the order ID or quote ID.

From CTI Integration

PeopleSoft Order Capture integrates with PeopleSoft CTI capabilities. A customer can enter an order ID by using the telephone, and a successful match launches order status for that order ID.

Delivered User IDs and User Roles

PeopleSoft Order Capture delivers the following users and roles:

User ID	Role Name	Role Description	Access
OCADMIN	Order Capture Admin	Administrator	All Order Capture functionality, including the ability to set up Order Capture, but minus the ability to remove holds.
OCMGR	Order Capture Manager	Manager	All Order Capture functionality, including the ability to remove holds but minus the ability to set up Order Capture.
OCREP	Order Capture Rep	CSR (Customer Service Representative)	All Order Capture functionality, except for 1) the ability to remove holds placed on orders, and 2) the ability to do set up.

You can adopt the users and roles that PeopleSoft Order Capture delivers, or you can modify them to better suit your business needs:

Note. To modify permissions for the delivered user roles, navigate to PeopleTools, Security, Permissions & Roles, Roles.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Setting Up PeopleSoft Customer Relationship Management Security and User Preferences”

Support for Industry-Specific Dynamic Events

PeopleSoft Order Capture supports business event logic, in the form of application class sets. These events are used out-of-the-box in the communications industry:

Supported Event	Description
Product Pre-qualification	This event fires after product and site information has been entered on the order line. The event fires on the first server trip following product and site entry on the order form.
Order Pre-qualification	This event fires after the CSR clicks the Save button. This event allows for logic that preprocesses an order before final changes are saved to the database.

See Also

Chapter 3, "Setting Up PeopleSoft Order Capture," Creating Dynamic Events, page 35

Customer Connection, "Understanding Application Classes in PeopleSoft Order Capture and PeopleSoft Order Capture Self Service."

Correspondence Generation

PeopleSoft Order Capture generates correspondence automatically and manually:

- Automatic correspondence are initiated at the point of order or quote submission.
- Manual correspondences are initiated when the Send Correspondence button in the toolbar is clicked.

Upon order or quote submission, PeopleSoft Order Capture sends automatic email based on the MCF Type setup for Order Confirmation, Quote Confirmation and Order change. A related object is created for each automatic acknowledgement of a correspondence. This appears on the Related Actions tab for the order or quote. Related actions are not created for manual correspondence.

For manual notifications, the CSR clicks the button to access a Create Correspondence page where she can send text messages to pre-populated recipients through different communication channels, either email or print. PeopleSoft Order Capture delivers two templates that can be used when a correspondence is sent:

- *Order Confirmation* is a thank you note with order status information for the customer.
- *Quote Confirmation* is a note stating that the quote has been registered by the system.

You can add attachments to the text message and you can also schedule its exact delivery. After a correspondence is sent, the system automatically creates an interaction on the 360-Degree View for the associated contact.

Note. Before creating a correspondence, make sure that a contact is available on the entry form. The system pre-populates the Recipients field of the correspondence request with the contact defined for the order.

The following table summarizes the possible correspondence activity for PeopleSoft Order Capture:

Template Name	Channel	Description of Action
Order Confirmation	Email and Print	Emails an order confirmation with the order number, customer name, status, products, billing and shipping information. Prints a PDF or Word document version of order confirmation with the same details as in the email.
Order Maintenance	Email and Print	Emails a text of order maintenance with the order number, customer name, status, order change details, products, billing and shipping information. Prints a PDF or Word document version of order maintenance with the same details as in the email.
Order Status	Email	The order inquiry application service in ERMS uses this template to respond to structured email with the status of the order.
Order Status - Failure	Email	The order inquiry application service in ERMS uses this template to respond to structured email that does not provide valid data.
Quote Confirmation	Email and Print	Emails a text of quote confirmation with quote number, customer name, status, products, billing and shipping information. Prints a PDF or Word document version of quote confirmation with the same details as in the email.
Sales Quote Proposal Letter	All	Emails the quote with an email cover letter, and an attachment of the quote. The quote details contain quote number, expiration date, and product details. Prints a PDF or Word document version of the quote, and the quote with the same details as in the email.

See Also

Chapter 3, "Setting Up PeopleSoft Order Capture," Defining MCF Types, page 40

Chapter 3, "Setting Up PeopleSoft Order Capture," Defining MCF Types, page 55

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, "Correspondence Management"

Personalizing PeopleSoft Order Capture

This section provides an overview of personalization and discusses how to:

- Choose order entry form personalizations.
- Change the default entry form values.
- Configure search criteria.
- Access PeopleSoft Order Capture features.

Understanding Personalization

You can personalize defaults to make your experience with PeopleSoft Order Capture as efficient and as user-friendly as possible. PeopleSoft provides a Personalizations feature that enables you to change the defaults for the most commonly used functions within PeopleSoft Order Capture.

Note. PeopleSoft Order Capture also delivers powerful Workbench functionality whereby you create application class sets that modify Order Capture settings to best suit your business processes.

See Also

Chapter 3, "Setting Up PeopleSoft Order Capture," page 25

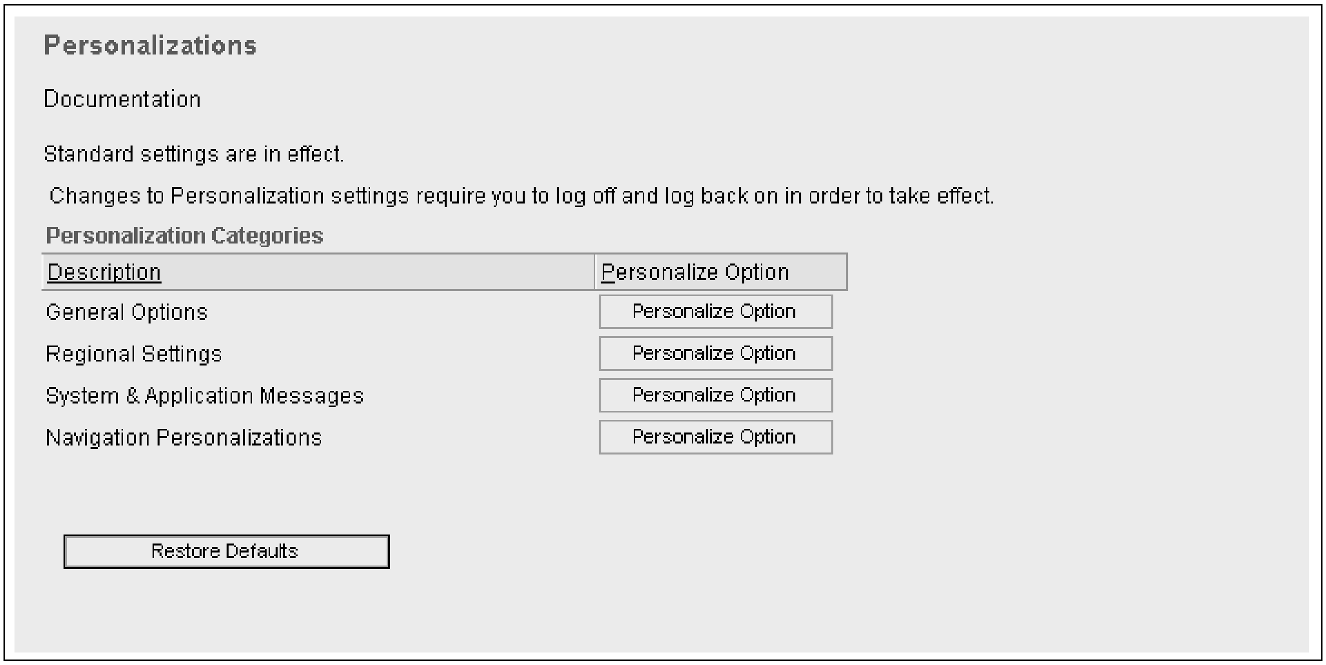
Customer Connection, "Understanding Application Classes in PeopleSoft Order Capture and PeopleSoft Order Capture Self Service"

Pages Used to Personalize PeopleSoft Order Capture

Page Name	Object Name	Navigation	Usage
Personalizations	PSUSERSELFPRSNL	My Personalizations	Choose order entry form personalizations. You can also restore defaults from this page by clicking the Restore Defaults button.
Option Category: General Options	PSUSERSELFPRSNL	My Personalizations, Click Personalize Options (for General Options Description).	Change the default entry form values or restore category defaults. Override any of six defaults for Order Capture.

Choosing Order Entry Form Personalizations

Access the Personalizations page.



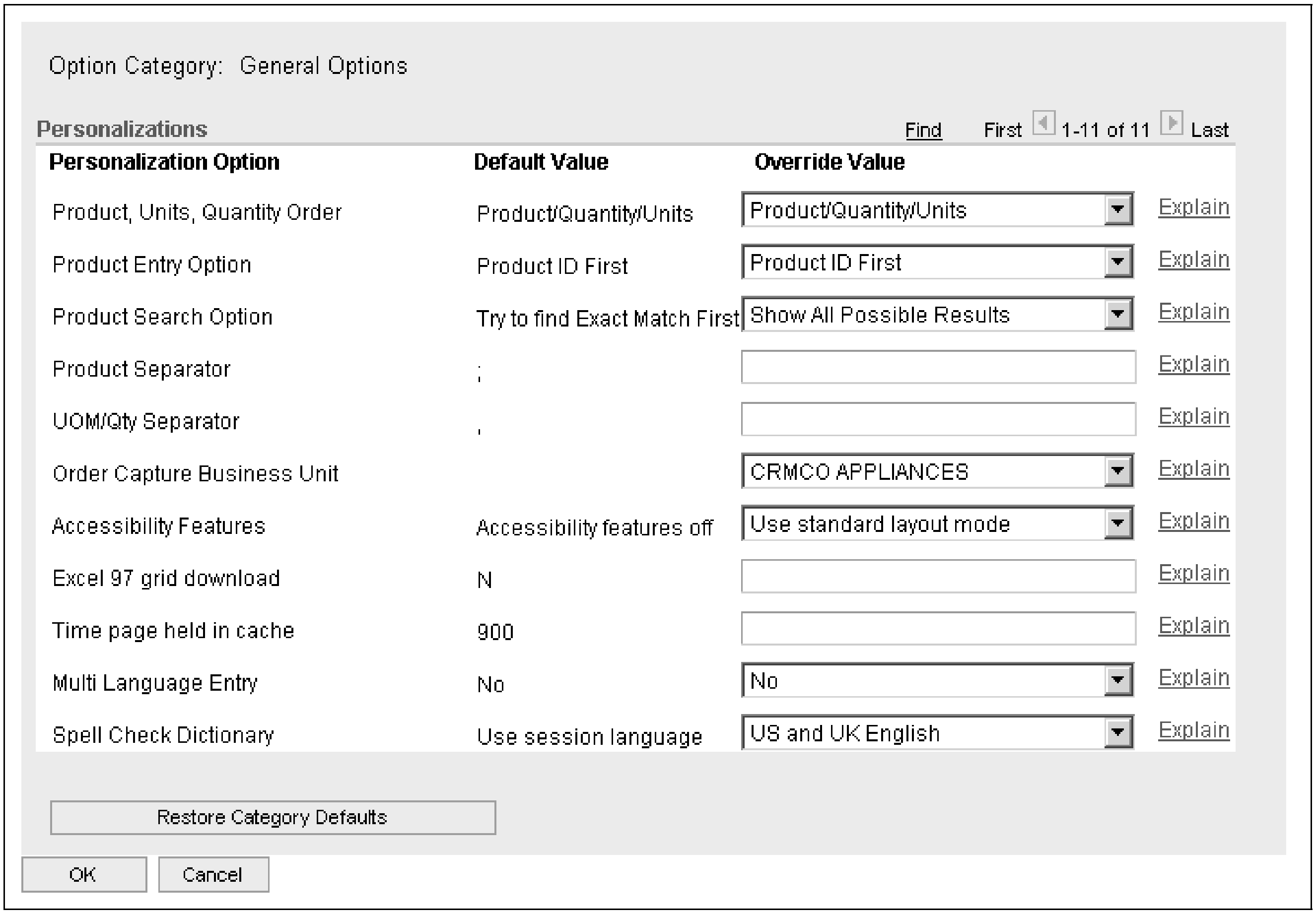
Personalizations page

Personalize Option Click to access the settings for the personalization category. For PeopleSoft Order Capture, relevant settings are in the General Options personalization category.

Restore Defaults Click to restore default settings for all categories.

Changing the Default Entry Form Values

Access the Option Category: General Options page.



Option Category: General Options

Personalizations

Find First 1-11 of 11 Last

Personalization Option	Default Value	Override Value	
Product, Units, Quantity Order	Product/Quantity/Units	Product/Quantity/Units	Explain
Product Entry Option	Product ID First	Product ID First	Explain
Product Search Option	Try to find Exact Match First	Show All Possible Results	Explain
Product Separator	;		Explain
UOM/Qty Separator	,		Explain
Order Capture Business Unit		CRMCO APPLIANCES	Explain
Accessibility Features	Accessibility features off	Use standard layout mode	Explain
Excel 97 grid download	N		Explain
Time page held in cache	900		Explain
Multi Language Entry	No	No	Explain
Spell Check Dictionary	Use session language	US and UK English	Explain

Restore Category Defaults

OK Cancel

Option Category: General Options page

Personalizations

View the Default Value or Override the Default Value for any of the Personalization Options specified below:

Product, Units, Quantity Order Choose a preferred sequence for using the Add Product(s) functionality on the main Entry Form. This allows you to change how you like to enter multiple products at one time.

Product Entry Option Specify whether you want PeopleSoft Order Capture to search by *Product Description First* or *Product ID First.* Use this to improve performance by setting the value you normally use to search for products.

Product Search Option Specify whether you want PeopleSoft Order Capture to search by finding an exact match first or to show all possible results. Use this to improve performance.

Product Separator Identify a product line separator. The Add Product(s) field on the Entry Form has powerful processing functionality contained within it. It allows for the insertion of a special character to divide product lines. For example, you can define this as a colon or semicolon, and then during order entry, you could enter two separate sets of product information.

Note. Our system-delivered data specifies a semicolon.

UOM/Qty Separator (Unit of Measure/Order Quantity)	Identify a UOM/Qty separator. The Add Product(s) field on the Entry Form allows for the insertion of a special character to divide information for multiple product lines. For example, you could add two cases of product 10003 by entering *10003:2:cs.* This would then populate an order line with two cases of product 10003, and would save you time. **Note.** Our system-delivered data specifies a colon.
Order Capture Business Unit	Specify your default business unit. If you regularly use a particular business unit, then this setting saves time during order and quote entry.

Configuring Search Criteria

PeopleSoft Order Capture searches are quite extensive and enable you to find existing orders or quotes in a variety of ways. You can use multiple search criteria to narrow your search for existing orders or quotes. Once you identify the criteria by which you most often search for orders and quotes, you can personalize the Order Capture search pages and save that personalization. The next time that your search page launches, you will work from the personalized search page that you have created.

Note. If there is more than one result for a search, the results can be distinguished by different criteria, including Customer, Date Created, Status, and Source.

Creating Orders or Quotes

This section discusses how to:

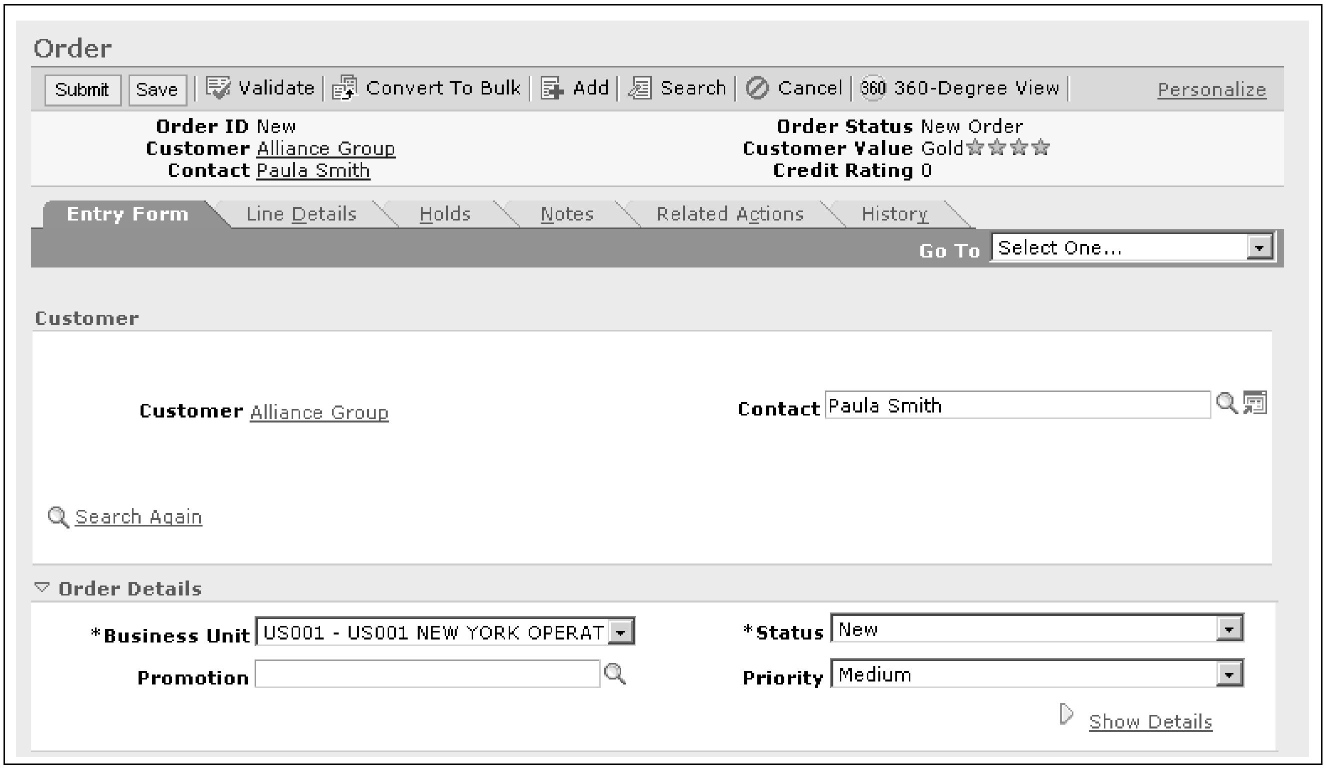
- Enter orders or quotes.
- Get product recommendations.
- Start a PeopleSoft Real-Time Advisor Dialog.
- View or modify line details.

Pages Used to Create Orders or Quotes

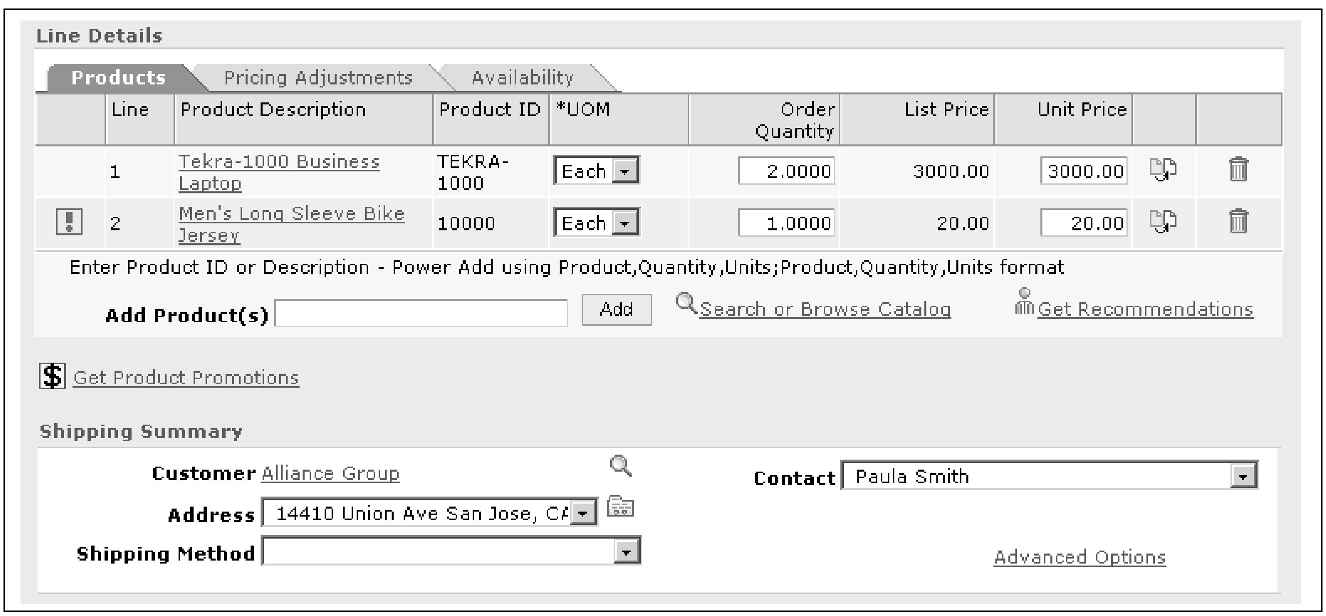
Page Name	Object Name	Navigation	Usage
Quote - Entry Form, Order - Entry Form	RO_FORM	• Orders and Quotes, Add Quote • Orders and Quotes, Add Order	Create a new order or quote by entering order details and adding products to the order lines.
Submit Confirmation	RO_SUBMIT_CONFIRM	Click the Submit button on the Quote - Entry Form or Order - Entry Form page.	View a summary of the order or quote.
Order - Line Details, Quote - Line Details	RO_CAPTURELINE_DTL	• Click the Line Details tab on the Quote - Entry Form page. • Click the Line Details tab on the Order - Entry Form page. • Click the Product Description link or the Upsell link in the Order Details section on the Order - Entry Form page. • Click the Product Description link or the Upsell link in the Quote Details section on the Quote - Entry Form page.	View upsell or cross-sell opportunities, and check product availability. You can edit line details such as unit of measure, order quantity, unit price, and promotion code. You can also allow partial shipment for this product.
Product Advisor List	RO_LISTDISP_SEC	Click the Get Recommendations link on the Quote - Entry Form or Order - Entry Form page.	Select a catalog from the list of catalogs available. You can then launch Advisor dialogs that are associated to the catalog.
PeopleSoft Advisor Dialog Start	RAD_ADVISOR_RUN	Select a catalog on the PeopleSoft Advisor List page.	Use a PeopleSoft Advisor dialog session to recommend a product, service, or solution based upon the buyer's responses to predefined questions.
Check Availability and Pricing	RO_FORM	Click the Availability tab on the Quote - Entry Form or Order - Entry Form page. Then click the Check Availability link.	Create partial shipments, add promotion codes, or view pricing details for order lines.

Entering Orders or Quotes

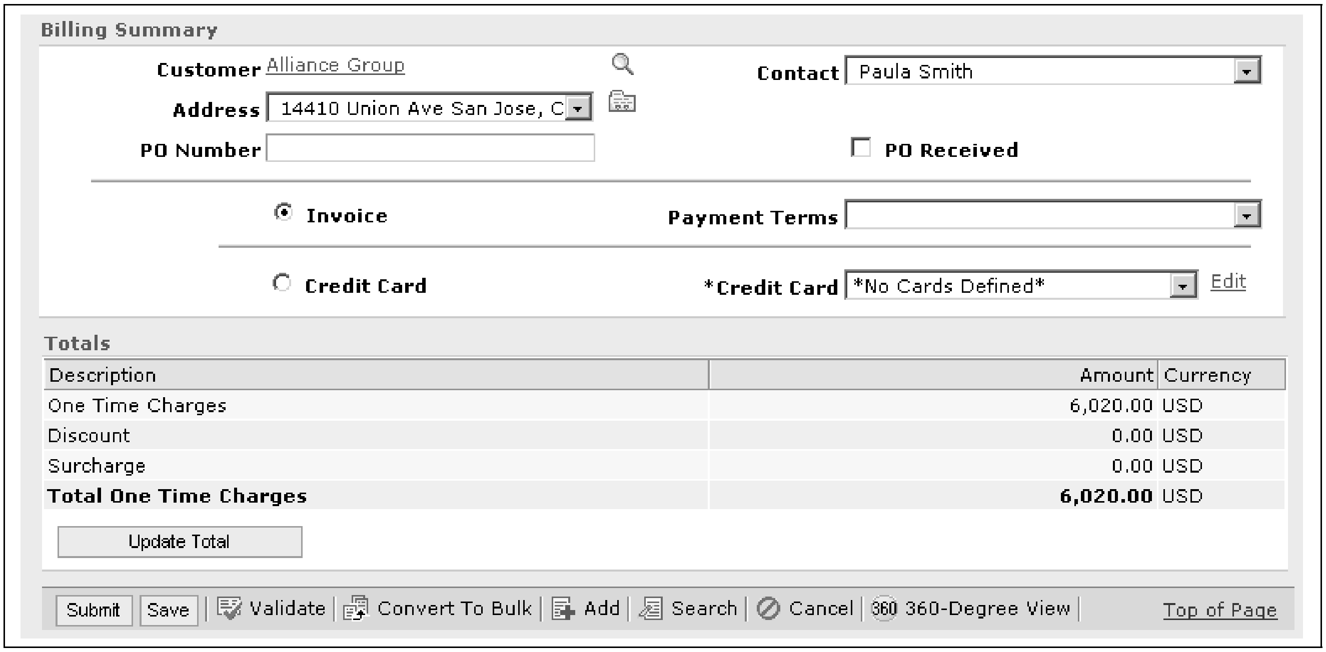
Access the Order - Entry Form page.



Order - Entry Form page (1 of 3)



Order - Entry Form page (2 of 3)



Order - Entry Form page (3 of 3)

Credit Rating

Display-only field that is associated with the customer and defaults from the customer data model.

Customer

PeopleSoft Order Capture initially displays the Customer, First Name, and Last Name fields. After you enter or select a customer, PeopleSoft Order Capture displays the Customer and Contact fields.

Customer

- Enter the name of the customer.
- Click to access the Company - Summary page to view information about the customer. PeopleSoft Order Capture opens a new window to access the Customer Data Model.

PeopleSoft Order Capture enables you to create a new customer directly from the Entry Form page using the Quick Create functionality. To create a new customer:

1. Enter a customer name.
2. Click Search to access the Search For Sold To Customer page.
3. From the Select Action drop down list, select one of the following:
   - *Create Company*
   - *Create Company With Contact*
   - *Create Company With Site*
   - *Create Consumer*
   - *Create Consumer With Contact*
4. Click Go to access the page that you selected.
5. Populate all fields associated with a customer from one central Quick Create page.

6. Click Save to save the information for the new customer.

   You have now created a new customer.

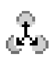
See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, “Working with Predefined Business Object Search and Quick Create Data”.

Contact

The primary Sold To contact defaults here. You can change the contact to any valid Sold To contact associated with this customer for this transaction by selecting from the prompt.

Note. If the customer is a company, a Sold To contact is required. A consumer does not require a Sold To contact. Orders or quotes that do not have a contact when one is required are automatically placed on Hold.

Click the Search for Contact button to access the Search For Contact Of [company] page to view, select, or add contacts for the company.



Click the Show Details button to access the Partners Contact page to view, modify, or add contacts.

Search Again

Click to access the Search For Sold To Customer page to search for a different customer.

Order Details

This section appears on the Order - Entry Form page and is similar to the Quote Details section on the Quote - Entry Form page.

PeopleSoft Order Capture displays these page elements for orders and quotes:

Business Unit

Select a business unit to use for this order or quote.

Status

Displays the status of the order or quote.

Promotion

Select a code that uniquely identifies the promotional offer, if applicable. Products assigned to this promotion will then display a promotional price, rather than their regular price.

Note. This field involves integration to PeopleSoft Marketing, which relies upon the pricing engine to establish promotional pricing.

See *PeopleSoft Enterprise CRM 8.9 Marketing Applications PeopleBook*, “Creating Campaigns and Activities”.

See *PeopleSoft Enterprise Pricer 8.9 PeopleBook*.

Priority

Priorities appear by default from the Order Capture Business Unit. You can change the priority for the order or quote to *Urgent, High, Medium,* or *Low.*

Note. There is no extra processing logic associated with priorities. Priorities may be changed from the Setup Workbench.

Show Details or **Hide Details**

Click to view or hide additional details about the order.

Description Describe the order.

Order Date This date does not have to be today's date, but can be a past, present, or future date. For example, you may want to postdate the order because it was faxed prior to today's date, or you may want to create an advance order. All of these date creation options are available here.

Currency Select the currency to use for the order or quote. This defaults based on the business unit.

Source Identify the source of the order or quote as either *CTI, Fax, Phone, Self Service,* or *SCM.*

Note. Source types may be changed from the Setup Workbench.

Quote Details

This section appears on the Quote - Entry Form page and is similar to the Order Details section on the Order - Entry Form page. Page elements that appear in both the Quote Details and Order Details sections are described above in the Order Details section of this PeopleBook.

PeopleSoft Order Capture displays these additional page elements for quotes:

Quote Date This date does not have to be today's date, but can be a past, present, or future date. For example, you may want to postdate the quote because it was faxed prior to today's date, or you may want to create an advance quote. All of these date creation options are available here.

Due Date Enter the date due for the quote. Due Date can be used if the customer has requested pricing information by a certain date, or if the quote is part of a request for quote (RFQ) that is due by a certain time. A default date may populate this field if specified during business unit setup.

Expire Date Enter the expiration date for the quote. A default date may populate this field if specified during business unit setup.

Revision Displays the total number of times the quote has been revised.

Confidence Level % PeopleSoft Order Capture provides this field so that PeopleSoft Sales can populate its relevant data in the quote. The value amount is transferred from an opportunity if populated on the opportunity.

Line Details: Products Tab

You can add, remove products, access a catalog, or launch PeopleSoft Advisor to identify a product that suits your customer's specifications. When you create a new quote or order, PeopleSoft Order Capture displays the Add Products, Search or Browse Catalog, and Get Recommendations field elements, which we discuss in this section. After you enter a product, PeopleSoft Order Capture displays additional fields that also appear on the Order - Line Details page, which we discuss in the Viewing or Modifying Line Details section of this PeopleBook.

See Chapter 8, "Managing Orders and Quotes," Viewing or Modifying Line Details, page 133.

Add Product(s) Enter the Product ID or a description to search for a product, service, or product package. The system retrieves all the products that you have requested and enters each product on a new line. You can enter more than one product at a time by separating the product IDs or descriptions with semicolons. Be sure to leave no spaces between the IDs or descriptions. This field contains processing logic so that you do not need to enter exact information. Partial matches retrieve the Product Search Results Page, which lists all of the closest matches.

Note. This field is also equipped with Personalization capability. A CSR's preferences for product selection can be configured so that a variety of input techniques can be used.

Search Catalog

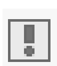
Click to view catalogs that are associated with this business unit. You can make selections from available catalogs and compare products or services. You can then add product selections directly to the order form.

Get Recommendations

Click to access PeopleSoft Advisor. PeopleSoft Advisor presents you with a question and answer dialog session, where your answers to specific questions will lead to a list of recommendations.

Note. PeopleSoft Advisor is associated to a data model, so that it can retrieve products. In this case the PeopleSoft CRM product data model, which includes automatic filtering based on the catalog definitions, is the data model that PeopleSoft Advisor uses.

After you enter or select a product, PeopleSoft Order Capture may display the following buttons:



Click the Upsell button to view an upsell or cross-sell opportunity. The upsell alert appears on the order line if there is an upsell or cross-sell opportunity associated with the product.

 **Configure Product**

Click to launch the product PeopleSoft Sales Configurator. When the product is configured, the background button color becomes light blue.

See *PeopleSoft Enterprise CRM Advanced Configurator 8.9 PeopleBook*.

 **Configure Package**

Click to configure and view the components of a dynamic package. The background color changes to light blue after the product has been lightly configured.

Note. Dynamic packages are supported by the CRM Product Data Model, and exist independently of the PeopleSoft Configurator.

 **Attributes**

Click to add configurable product attributes to an order or quote line. Always specify the attribute value for products with required attributes.

See *PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook*, "Setting Up Products," Defining Product Attributes.

 **Add Note**

Click to access the Notes and Attachments page. The cursor is automatically placed on the Summary line so that you can write your note immediately. When a note is attached, the button becomes dotted.

 **Get Product Promotions**

Select to access the Products Promotions page to view the promotions that are defined in Marketing for the customer.

Line Details: Pricing Adjustments

Select the Pricing Adjustments tab to enter discounts or surcharges for the product.

Discount A calculated amount of list price minus the unit price is calculated here for quick reference.

Promotion Code Select a Promotion Code for the line. If you add a product to the order line using the Promotion Code, the associated promotion code populates this field.

Note. This field differs from the field on the Header only in that you can specify a product promotion for a specific line.

Adjustment Enter the amount of the adjustment you want to apply to this order line. You can choose to enter either a percentage discount or an actual currency discount. Select *Percent* or *Amount* in the next field to decide whether the number you enter here will be a percentage of the price, or a static currency adjustment.

Percent/Amount Identifies the adjustment field as an exact *Amount* or a *Percentage*.

Adjustment Type Select *Discount* or *Surcharge*.

Apply Adjustment Click to apply the discount or surcharge to the order line. The system updates the Total Price and Discount fields.

More... Click to access the Price Adjustments page to view or delete manual adjustments.

See Chapter 8, “Managing Orders and Quotes,” Viewing or Modifying Line Details, page 133.

Line Details: Availability Tab

Select the Product Availability tab to return a numerical count of the remaining number of products in stock for those products that you have selected.

Availability Click the link to conduct a real-time availability check.

Partials Select to allow partial shipment of the order line.

Shipping Summary

Use this section to enter shipping information.

See Chapter 8, “Managing Orders and Quotes,” Entering Shipping, Payment, and Billing Information, page 140.

Billing Summary

Use this section to manage payment information.

See Chapter 8, “Managing Orders and Quotes,” Entering Shipping, Payment, and Billing Information, page 140.

Totals

One Time Charges As opposed to recurring charges, these charges indicate charges that occur only once.

Recurring Charges
As opposed to one-time charges, these charges indicate charges that occur with varying frequency, such as weekly, monthly, or annually.

Discount
Discounts identified on the Pricing Adjustments tab are applied.

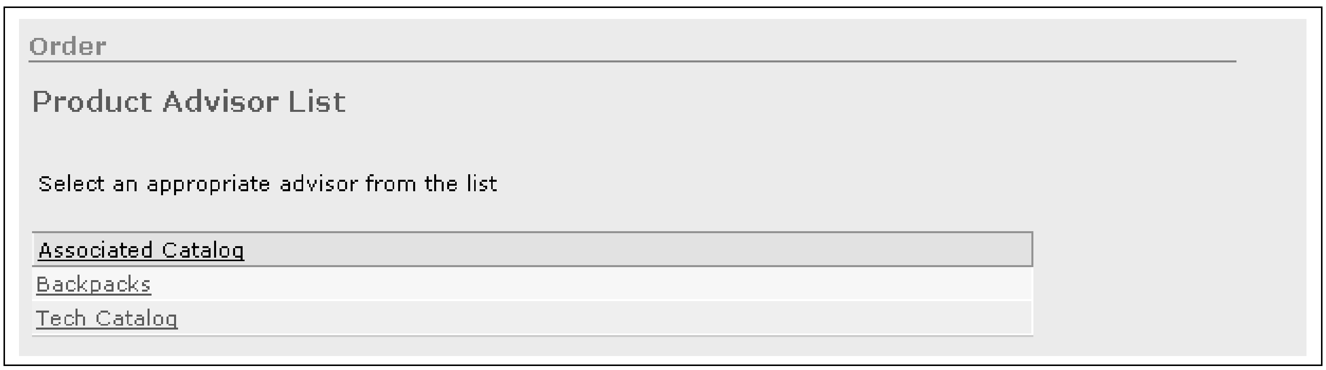
Taxes and **VAT**
PeopleSoft Order Capture integrates with Taxware, Vertex, and WorldTax to calculate VAT and other taxes. You must have already defined your tax integration options for Order Capture on the Business Unit definition page and tax provider page.

Note. To display VAT, you must define World Tax as your Tax Vendor when you created your PeopleSoft Order Capture business unit. You can test all of your third party integrations on the business unit definition page.

Update Total
Click to manually invoke the pricing engine and any third party calculations such as VAT, taxes, and shipping, and update the total amount charged to this order or quote. This is then reflected in Total One Time Charges.

Getting Product Recommendations

Access the Product Advisor List page.

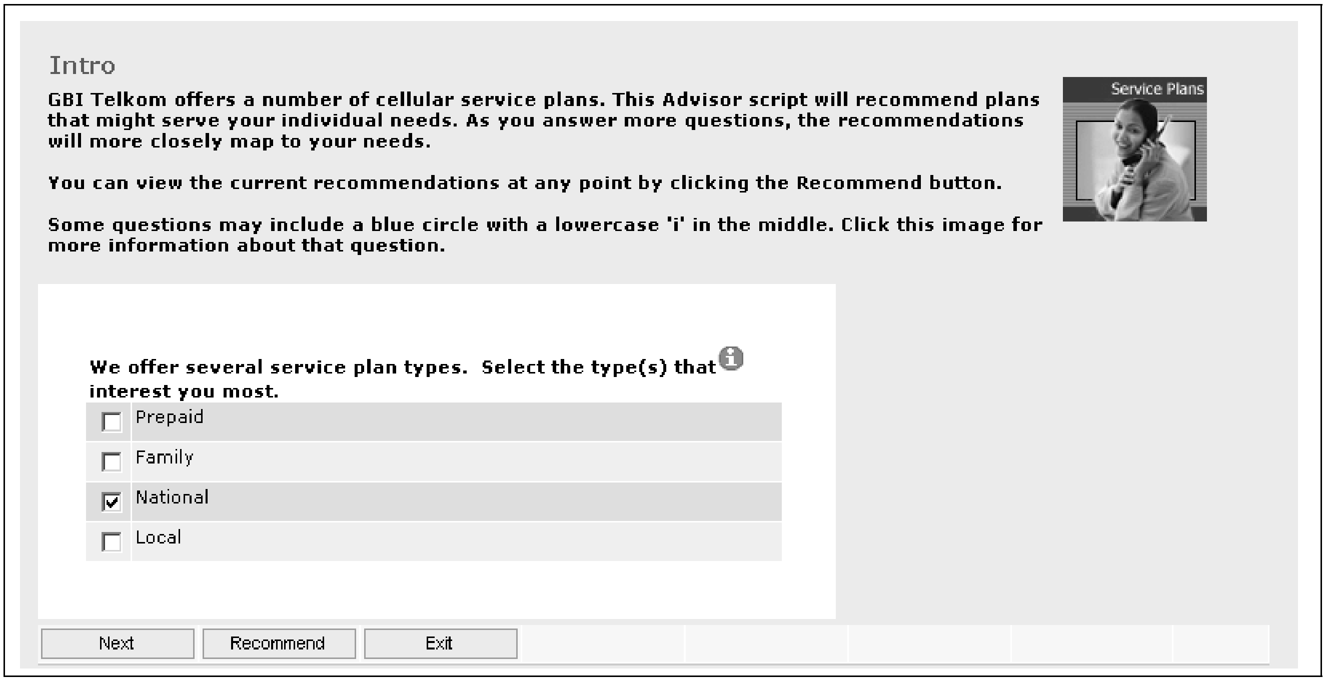


Product Advisor List page

You can leverage PeopleSoft Real-Time Advisor to engage the buyer in question and return recommendations. When you click the Get Recommendations link, it launches a question and answer dialog session. When you first click the Get Recommendations link, the system first displays the Product Advisor List page that lists catalogs with a Real-Time Advisor Dialog associated with it. Select a catalog and PeopleSoft Order Capture displays the first page in the dialog.

Starting a PeopleSoft Real-Time Advisor Dialog

Access the PeopleSoft Real-Time Advisor Intro page.



PeopleSoft Real-Time Advisor Intro page

The dialog is a series of pages that contain questions and answers. Answers do not provide a static response from PeopleSoft Real-Time Advisor. Instead, the buyers responses determine the user segment that they are placed in, as well as the predefined weightings that are applied. If you choose to walk the buyer through the dialog, a recommendation for a product, service, or solution will be presented at the end of the dialog. You can also force a recommendation by clicking the Recommend button.

Click Exit to return to the calling application, which in this case is PeopleSoft Order Capture.

Note. Displaying the debug information is an optional feature of the Real-Time Advisor Dialog. To turn the debug information off, refer to the Advisor Workbench documentation in the PeopleSoft Advisor PeopleBook.

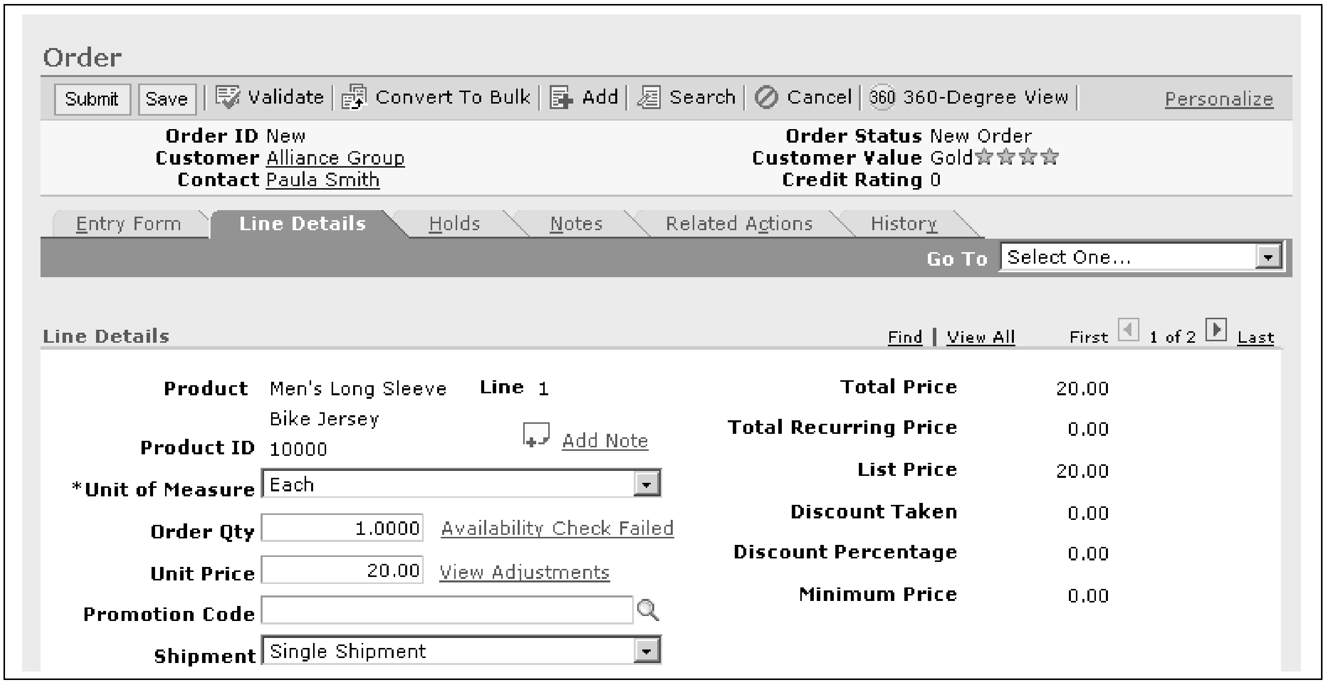
See Also

PeopleSoft Enterprise CRM Real-Time Advisor 8.9 PeopleBook, “Setting Up PeopleSoft Real-Time Advisor Dialogs”

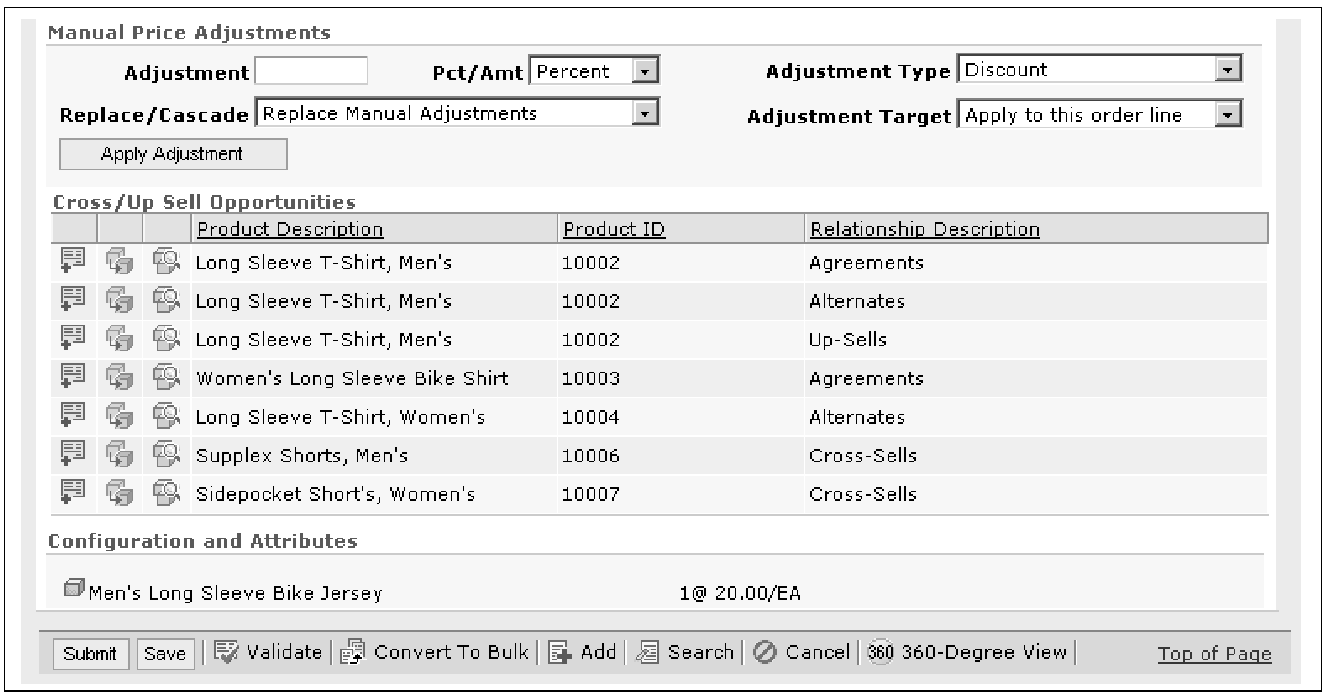
PeopleSoft Enterprise CRM Real-Time Advisor 8.9 PeopleBook, “Defining Display Templates”

Viewing or Modifying Line Details

Access the Order - Line Details page.



Order - Line Details page (1 of 2)



Order - Line Details page (2 of 2)

Line Details

The CSR can override the unit price here, and can also change the unit of measure, check availability and change the order quantity. Finally, a new promotion code can be added.

Check Availability Click to return an exact numerical count of the remaining number of products in stock.

Note. PeopleSoft Order Capture uses the SCM_PROD_AVAIL enterprise integration point (EIP) to make a call to PeopleSoft Supply Chain Management to determine product availability. PeopleSoft Supply Chain Management returns an exact numerical count of available products. If you are using a third party product for order fulfillment, you can use this integration point. It provides the ability to transform the EIP message to the appropriate format using the PeopleTools Integration broker. An "Availability Not Available," message next to the *Order Qty* field indicates an inactive integration to a third party inventory system.

View Adjustments Click on this link to view any price adjustments that have been applied to the order line.

Shipment Select *Single Shipment* to allow or not allow partial shipments.

Select *Ship as Items Available* to allow partial shipments.

Manual Price Adjustments

Adjustment Enter the amount of the adjustment you want to apply to this order line. You can choose to enter either a percentage discount or an actual currency discount. Select *Percent* or *Amount* in the next field to decide whether the number you enter here will be a percentage of the price, or a static currency adjustment.

Pct/Amt (percent/amount) Identifies the adjustment field as an exact *Amount* or a *Percentage.*

Adjustment Type Select *Discount* or *Surcharge.*

Replace/Cascade *Cascade Manual Adjustment* adds this price adjustment to all existing adjustments, whereas *Replace Manual Adjustments* replaces any manual adjustments with the current discount being applied.

Adjustment Target You can target the discount for the current line that you are looking at, in which case you select *Apply to this order line,* or you can apply the discount to the whole order, by choosing *Apply to entire order.*

Apply Adjustment Click to apply the discount or surcharge to the order line. The system updates the Total Price and Discount fields.

Configuration & Attributes

This grid provides a detailed list of the options chosen upon configuring a product on this order. Configuration details appear in a list under the Configurator button and product name. Other elements can also appear based on previously established setup parameters.

If a product is defined in the product data model as requiring configurable attributes, an icon appears at the point of order entry. This navigates the user through attribute capture. This icon also appears on this page along with the product name. You can also view the attribute and attribute values captured for the order.

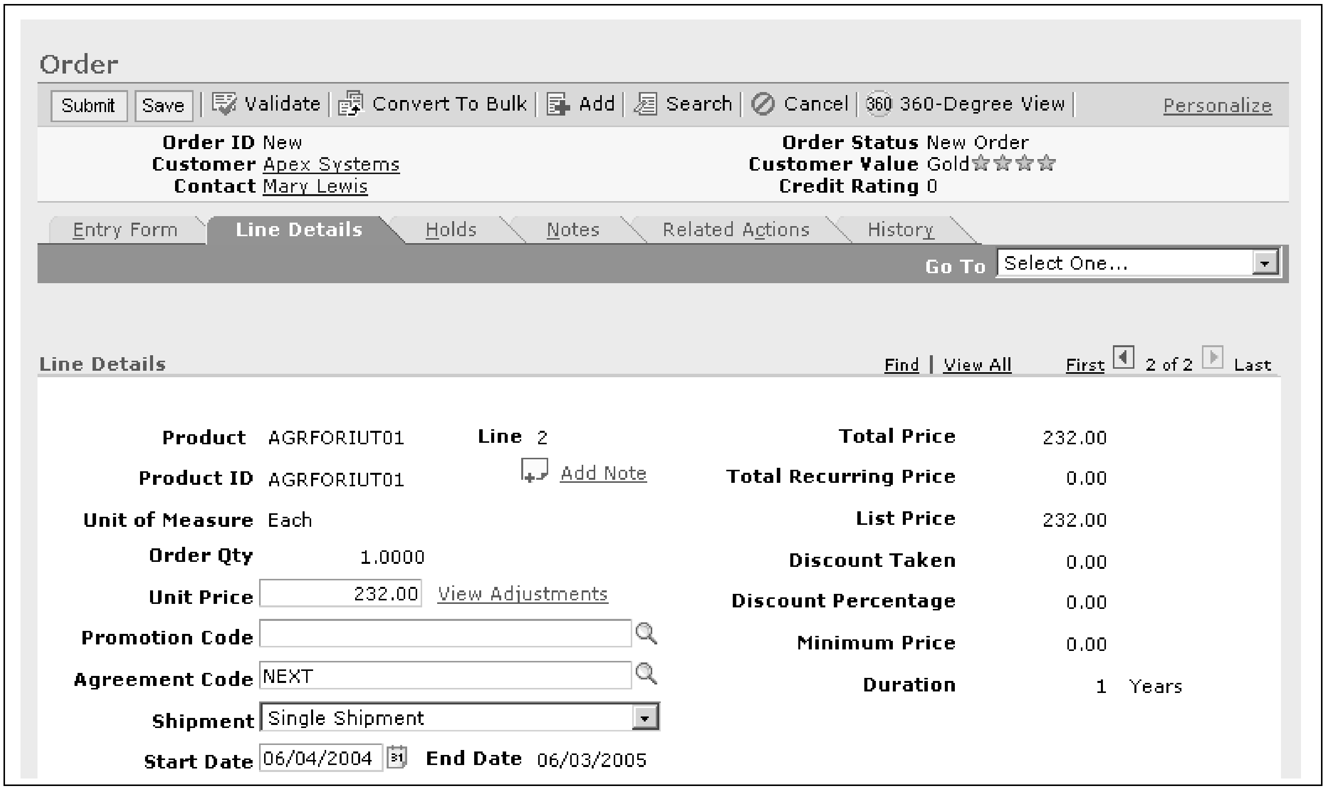
Note. You can control the level of detail that displays here. To control display options, you can navigate to Schemas-Display options in the Configurator setup.

See Also

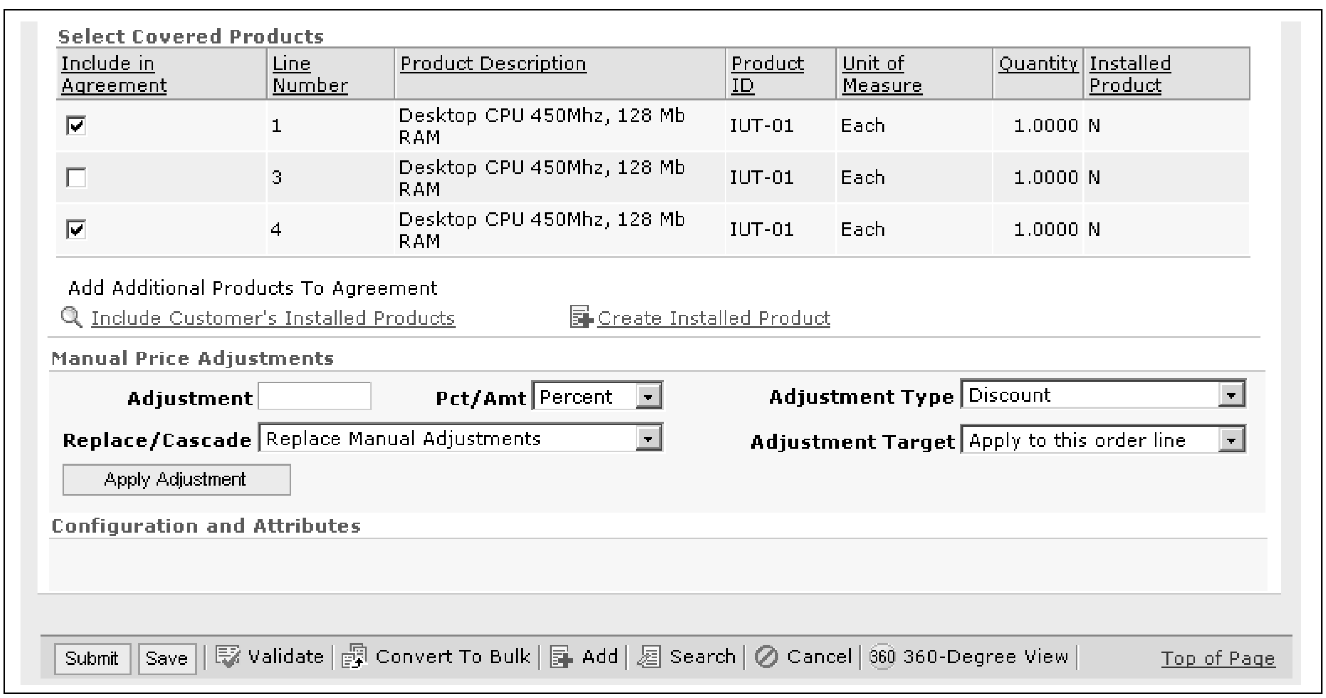
PeopleSoft Enterprise CRM Advanced Configurator 8.9 PeopleBook

Creating Service Agreements

Access the Order - Line Details page.



Order - Line Details page (1 of 2)



Order - Line Details page (2 of 2)

Service agreements, such as installation services, maintenance services, and support services provide an opportunity for increased profits, and PeopleSoft Order Capture enables you to sell both products and services together.

Using a Service Agreement product type, PeopleSoft Order Capture enables you to purchase agreement products. Additionally, a product relationship type of Agreements enables you to upsell agreement products with standard products.

Select Covered Products

Include in Agreement	Select to associate multiple ordered products to one service agreement. If multiple products on the order are eligible for coverage by the same service agreement product, based on the agreement template definition, PeopleSoft Order Capture displays them in the Select Covered Products grid. If selected, Order Capture includes them in the coverage and cost of the purchased agreement.
Include Customer's Installed Products	Click to access the Customer's Installed Products page to select installed products to provide coverage for on the order. If the customer has any installed products eligible for coverage by the agreement product, PeopleSoft Order Capture displays them in the Selected Covered Products grid.
Create Installed Product	Click to access the Installed Product page to create an installed product to add to the Select Covered Products grid. By default, when purchasing an agreement product through order capture, a new agreement will be created. This is indicated by the value of "NEXT" defaulted into the Agreement Code field. If instead, you would like to provide coverage against an existing agreement for this customer, one may be selected from the order line details page, by choosing the selection icon on the Agreement Code field.

Creating Configurations

The process for ordering configured products using PeopleSoft Order Capture is similar to the process for ordering standard products, with one exception. After you enter the order line on the Entry Form page, you must configure the product by clicking the Configure Product or Reconfigure Product link (or button) and selecting the desired options for that configured product on the Configuration page.

This section discusses how to:

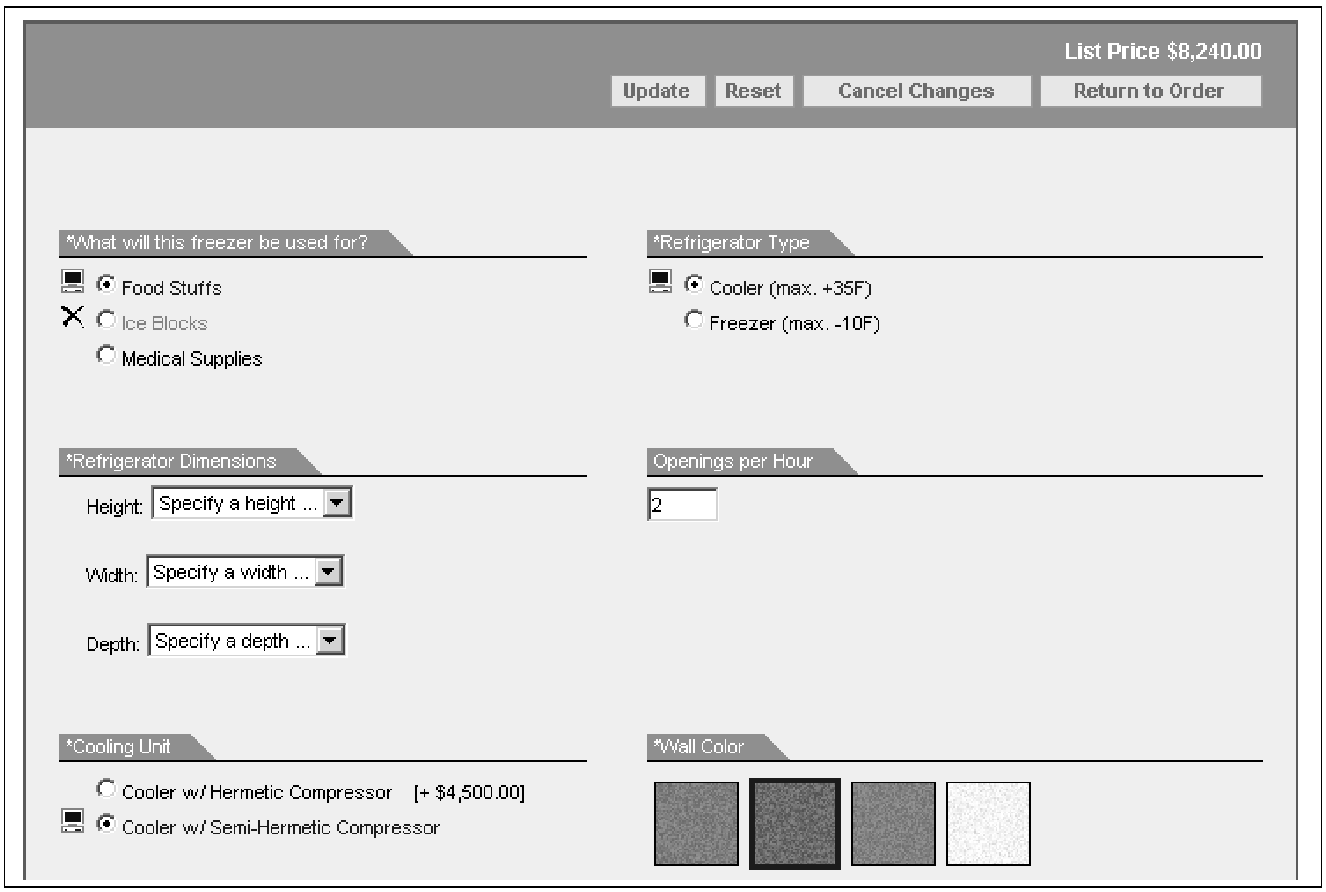
- Configure a product using PeopleSoft Configurator.
- Configure a dynamic package.

Pages Used to Create Configurations

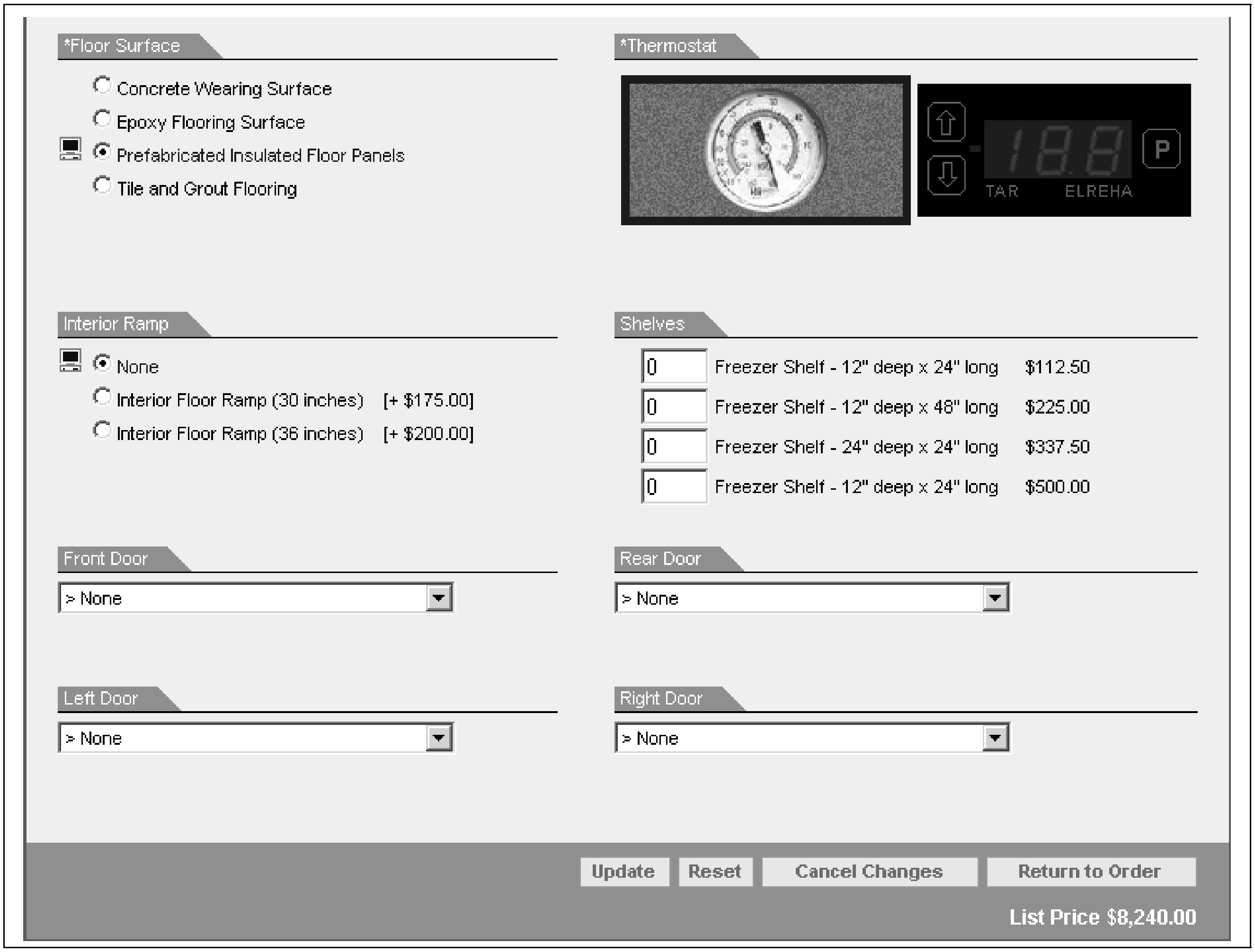
Page Name	Object Name	Navigation	Usage
Configure Product	CFG_HTML_SEC	Orders and Quotes, Add Order (or Add Quote) After adding a configured product, click the Configure Product button next to the order quantity.	Fully configure the product using PeopleSoft Configurator.
Dynamic Package	CP_DYNAMIC_PANEL	Orders and Quotes, Add Order (or Add Quote) Click the Dynamic Package button next to the order quantity for a product.	Create a dynamic package from within PeopleSoft Order Capture.

Configuring a Product Using PeopleSoft Configurator

Access a configuration session by clicking the Configure Product button for a configurable product, service, or solution.



Configure Product page (1 of 2)



Configure Product page (2 of 2)

Cancel Changes Click this button to cancel this configuration session and return to the order Entry Form in PeopleSoft Order Capture.

Return to Order Click this button to submit this configuration session and return to the Entry Form in PeopleSoft Order Capture.

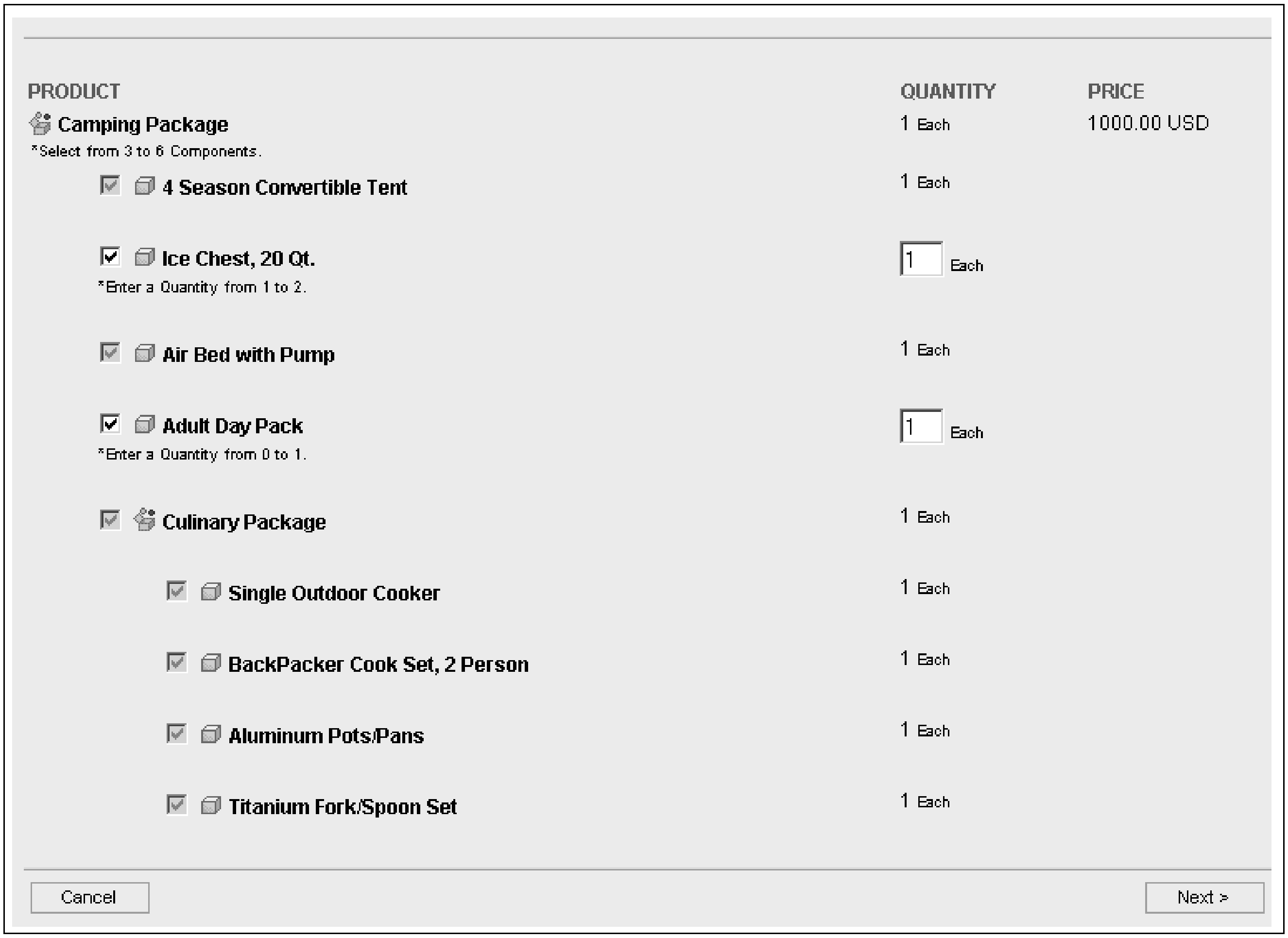
Note. The configuration display pages can vary widely depending upon how these pages were created.

See Also

PeopleSoft Enterprise CRM Advanced Configurator 8.9 PeopleBook

Configuring a Dynamic Package

Access Dynamic Package by clicking the Configure Package button next to the order quantity.



Dynamic Package page

Entering Shipping, Payment, and Billing Information

To complete the order or quote, you need to identify shipping and payment information.

This section discusses how to:

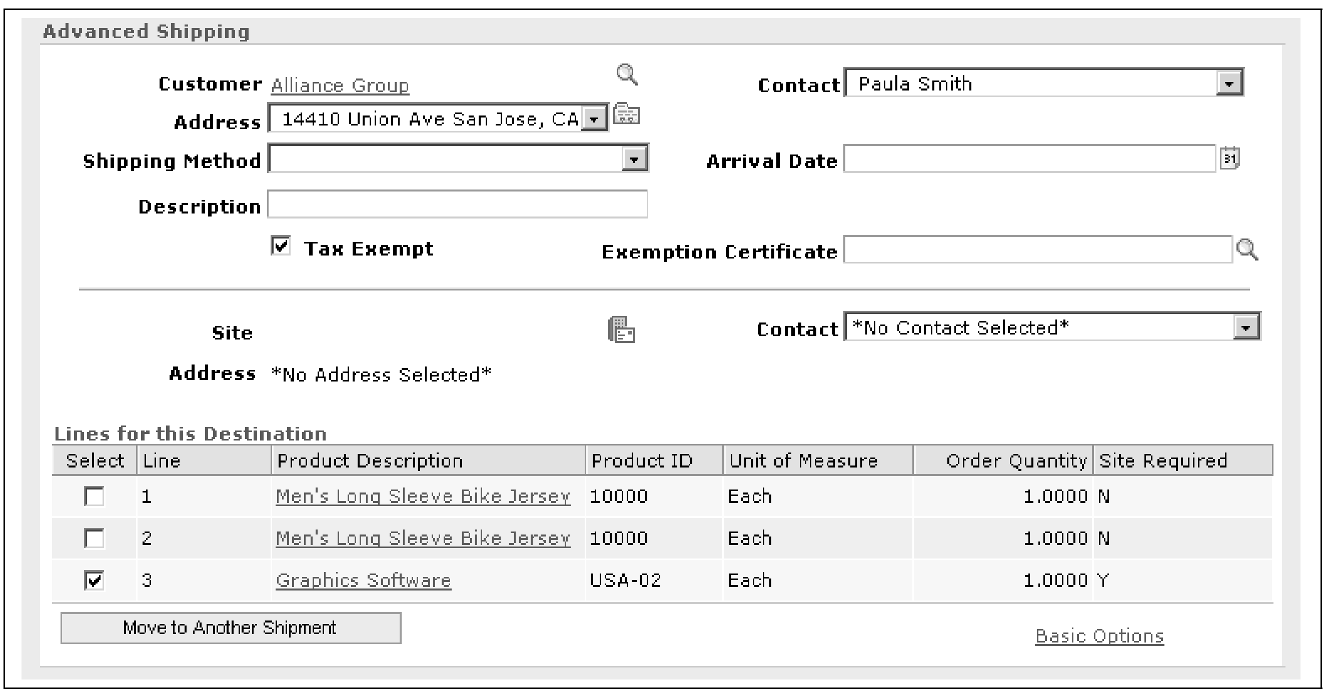
- Enter shipping information.
- Manage billing information.

Pages Used to Enter Shipping, Payment, and Billing Information

Page Name	Object Name	Navigation	Usage
Order - Entry Form (Advanced Shipping grid), Quote - Entry Form (Advanced Shipping grid)	RO_FORM	• Orders and Quotes, Add Order Click the Advanced Option link in the Advanced Shipping grid. • Orders and Quotes, Add Quote Click the Advanced Option link in the Advanced Shipping grid.	Enter shipping information.
Order - Entry Form (Billing Summary grid), Quote - Entry Form (Billing Summary grid)	RO_FORM	• Orders and Quotes, Add Order • Orders and Quotes, Add Quote	Manage payment information and add a new billing account, if applicable.
Order - [mode] Credit Card	RO_CREDITCARD_SEC	Click the Edit link on the Order - Entry Form page in the Billing Summary section.	Add or edit credit card information for billing purposes.

Entering Shipping Information

Access the Order - Entry Form page: Advanced Shipping grid.



Order - Entry Form page: Advanced Shipping grid

Customer Displays the customer who the order will be shipped to. Click to access the Company page in the Customer Data Model.

Click the Lookup Customer button to select a different ship to customer.

Contact

Select a shipping contact for the customer.

Note. Select *Add/Select More Contacts* to access the Address Book - Select Contact page to select or add a contact. When adding a new contact, you can indicate the new contact as a one-time contact by checking the "One Use Only (not a permanent address or contact)" on the Address Book - Create New Address page.

Address

Select a shipping address for the customer.

Note. Select *Add/Select More Addresses* or click the View Addresses button to access the Address Book - Select Address page to select or add a shipping address. When adding a new address, you can indicate the new address as a one-time address by checking the "One Use Only (not a permanent address or contact)" on the Address Book - Create New Address page.

Shipping Method

Select a carrier service. Applicable carriers that are to be used by the system are set up in the CARRIER_TBL.

See Chapter 3, “Setting Up PeopleSoft Order Capture,” Setting Up Freight Integration, page 62.

Arrival Date

Select the requested arrival date for the product(s) being shipped.

Description

Enter any additional information about the shipment.

Tax Exempt

Select if the shipment is exempt from taxes. If selected, PeopleSoft Order Capture displays the Exemption Certificate field where you select a tax exemption certificate.

Click the Select Site button to select the site and address or to add a site address. After you select a site, PeopleSoft Order Capture displays the site name, which you can then click on to access the Site page in the Customer Data Model.

Note. Select Site appears only when a product requires one, as defined in the product data model or if the *No Site Hold* option is active.

Contact

Select a site contact for the customer.

Note. Select *Add/Select More Contacts* to access the Address Book - Select Contact page to select or add a contact.

Contact displays only when a product requires one, as defined in the product data model or if the No Site Hold option is active.

Address

The primary address associated with the site appears here.

Note. Address displays only when a product requires one, as defined in the product data model or if the No Site Hold option is active.

See *PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook*, “Tracking Installed Products,” How Installed Products Are Created and Updated.

Lines for this Destination

This section shows all products tied to the shipment. You can split a shipment so that certain lines are:

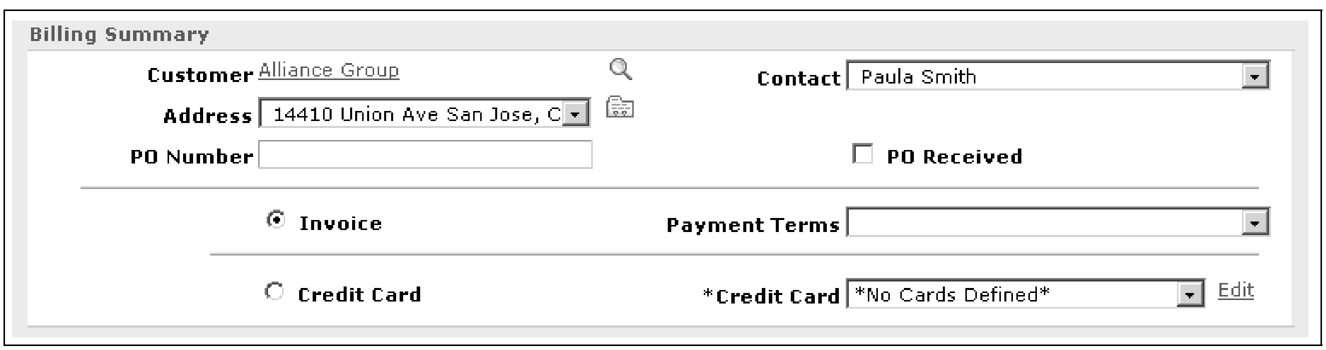
- Shipped to a different address.
- Shipped using a different shipping method.
- Assigned to a different site.
- Assigned a different requested date.

Note. You cannot split the quantity on a single line into multiple shipments. You must create two lines with the appropriate quantity so that you can specify a unique shipping address, shipping method, and date for each shipment.

Split	Select a line to split the order into multiple shipment.
Move to Another Shipment	After you select a line, click to split a line to create multiple shipments.
Combine with Previous Shipment	Click to combine the shipment with the previous shipment. This button appears after you split a shipment
Basic Options or **Advanced Options**	Click to view or hide details about the shipment.

Managing Billing Information

Access the Order - Entry Form page: Billing Summary grid.



Order - Entry Form page: Billing Summary grid

Customer	Displays the customer who the order will be billed to. Click to access the Company page in the Customer Data Model.
	Click the Lookup Customer button to select a different bill to customer.
Contact	Select a billing contact for the customer.

> **Note.** Select *Add/Select More Contacts* to access the Address Book - Select Contact page to select or add a contact. When adding a new contact, you can indicate the new contact as a one-time contact by checking the "One Use Only (not a permanent address or contact)" on the Address Book - Create New Address page.

Address Select a billing address for the customer.

> **Note.** Select *Add/Select More Addresses* or click the View Addresses button to access the Address Book - Select Address page to select or add a billing address. When adding a new address, you can indicate the new address as a one-time address by checking the "One Use Only (not a permanent address or contact)" on the Address Book - Create New Address page.

PO Number Enter the Purchase Order number, if one exists for the customer.

PO Received Select this check box if a Purchase Order has been received.

> **Note.** This functionality is designed solely for auditing purposes. There is no attached business logic.

Invoice Select to issue an invoice to the customer.

Payment Terms Select terms of payment if *Invoice* is selected as the payment method.

Credit Card (option) Select this option to charge the customer using a credit card.

Select a credit card if *Credit Card* is the payment method.

Credit Card (drop down list) Select an existing credit card from the drop down list or add a new credit card.

> **Note.** The credit card is attached to the bill to contact or consumer in the customer data model.

Edit Click to access the Order - [mode] Credit Card page to add or edit credit card information for the customer.

> **Note.** When you add or edit credit card information, you have the option to save the information in the Customer Data Model or not.

Billing Account

The Billing Account section appears if the Use Accounts flag on the PeopleSoft Order Capture Business Unit is selected. Accounts are mainly used for recurring charges and are utilized extensively for communications.

You can use an existing account for the order entry, or create a new one, if required for order processing.

Existing Account Select to refer this Order Capture payment to an existing service account.

Account Number Enter an existing service account number.

New Account Select to create a new service account, then select the type of account, either *individual*, *sponsored* or *subordinate*.

Individual Account Select to create a new account that is unrelated to other accounts.

Invoice	Select *invoice* as the payment method.
New Credit Card	Select an existing credit card or add a new credit card. **Note.** The credit card is attached to the bill to contact or consumer in the customer data model.
Sponsored Account	Select if there is a parent account that assumes billing responsibility for this new account. Choose the parent account ID in *Sponsoring Acct No*.
Subordinate Account	Select if there is a parent account that assumes billing responsibility for this new account. Choose the parent account ID in *Parent Account No.*

Viewing Price Adjustments

PeopleSoft Order Capture enables you to make pricing adjustments either to the order line or to the entire order.

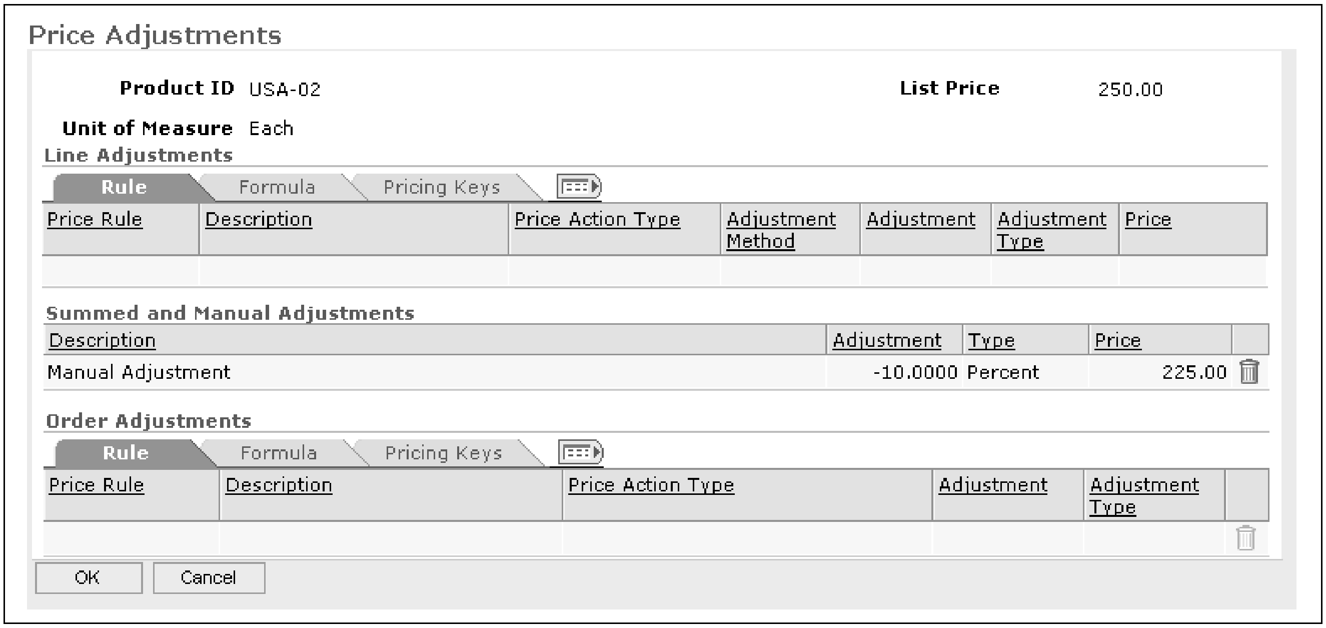
This section discusses how to view price adjustment details.

Page Used to View Price Adjustments

Page Name	Object Name	Navigation	Usage
Price Adjustments	RO_CAPTURELINE_ADJ	• Orders and Quotes, Add Order • Click the Line Details tab, then click on the View Adjustments link.	View details of the price changes that you made. You can view the pricing details for Line Adjustments, Summed and Manual Adjustments, and Order Adjustments.

Viewing Price Adjustment Details

Access the Price Adjustments page.



Price Adjustments page

Line Adjustments - Rule Tab

This grid displays all of the adjustments applied by the system, including the price rules that are being applied to the lines.

Line Adjustments - Formula Tab

Information on this tab provides more detail about the rules that are being applied.

Line Adjustments - Pricing Keys Tab

Information on this tab lists the identifiers which indicate where the Price Rule condition was met.

Summed and Manual Adjustments

This grid displays the summed and manual adjustments that were applied to the lines.

Order Adjustments

This grid displays the price adjustments that have been applied for the total order.

Adding and Viewing Notes and Attachments

You can add notes and attachments to either an order or a quote, or to an order or quote line.

This section discusses how to add or view notes and attachments.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Working with Notes and Attachments”

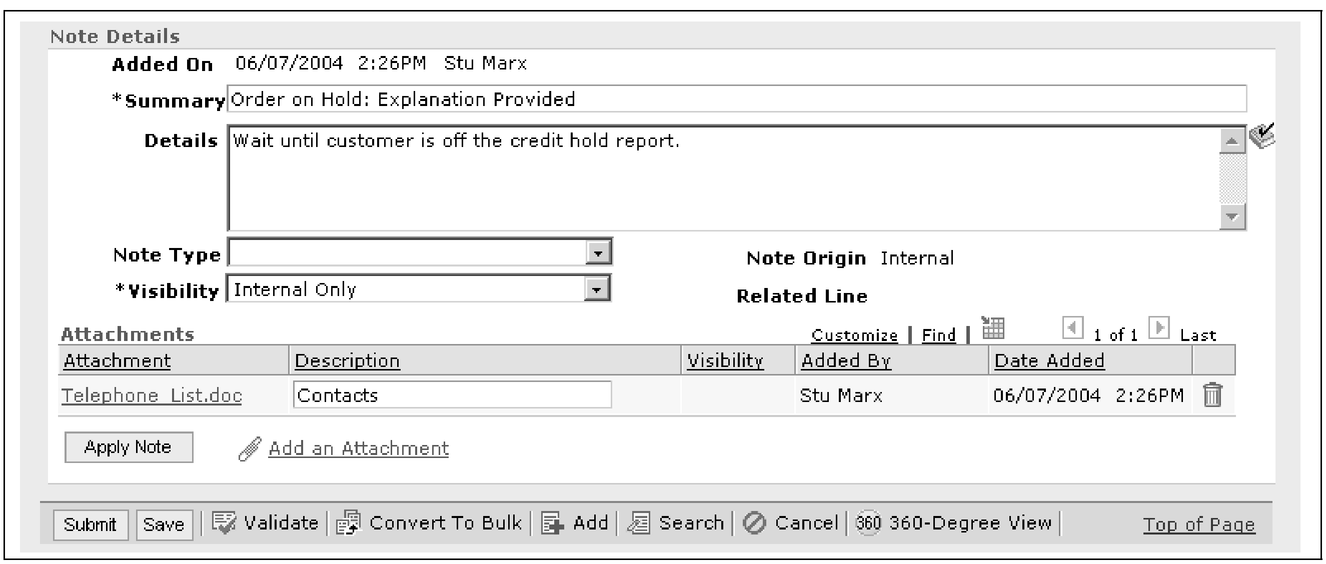
Pages Used to Add or View Notes and Attachments

Page Name	Object Name	Navigation	Usage
Order - Notes, Quote - Notes	RO_NOTE	• Orders and Quotes, Add Order, Notes • Orders and Quotes, Add Quote, Notes	Add or review notes or attachments for the order or quote.

Adding or Viewing Notes or Attachments

Access the Order - Notes page.

Order - Notes page (1 of 2)



Order - Notes page (2 of 2)

Notes Summary

This section displays a summary of notes.

Subject and Details Displays a short and long description of the note contents.

Add Note Click to add a note for the order.

Add a Note or Note Details

Note Type Select either *Billing Notes*, *Comment*, *Customer Call*, *Customer Web*, *Pricing Note*, *Production Configuration*, *Research*, *Sales Note* or *Shipping Notes* as the type of note.

Visibility Select *Everywhere* or *Internal Only*. If you select *Everywhere*, users of all self service applications, including PeopleSoft Order Capture Self Service will be able to view the note. If you select *Internal Only*, notes will only be viewable to the CSR.

Attachments

Attachment Click to view an existing attachment.

Apply Note After entering information, click to apply the note to the order or order line or to the quote or quote line.

Add an Attachment Click to add an attachment. PeopleSoft Order Capters opens a new page for you to browse the network to locate and attach a file to the note.

Managing Holds

This section provides an overview of holds and discusses how to view the hold summary.

Understanding Holds

Hold validations fire automatically as soon as you submit an order or quote. You can access the Holds page to see if an order has been put on hold. If there is a hold on the order or quote, Status changes to Hold Order. If there is no hold, a "Currently No Holds" message is viewable. There are a variety of reasons as to why your order or quote will be placed on hold. There are also several ways in which you can resolve the problem.

The following table identifies each hold in PeopleSoft Order Capture:

Hold Code	Explanation
Anonymous Customer Hold	Hold is triggered if the customer specified is setup as an anonymous Business Object. Use this hold when the fulfillment system does not support anonymous Customers.

Hold Code	Explanation
Configuration Hold	Hold is triggered if a line has a configured product and it is not configured when capture is submitted.
Exceed Corporate Credit Limit	Hold is triggered if the customer has exceeded the credit limit range as specified on the Customer and Business Unit.
Credit Card Hold	Hold is triggered if the customer is paying by credit card, and the authorization fails.
Currency Conversion Not Possible	Hold is triggered if there is no currency conversion available for the pricing engine.
Exceeds Maximum Order Qty	Hold is triggered if the quantity on the line exceeds the maximum order quantity.
Under Minimum Quantity	Hold is triggered if the quantity on the line falls below the minimum order quantity.
Below Minimum Selling Price	Hold is triggered if the quantity on the line falls below the minimum selling price.
No Bill To Contact	Hold is triggered if the bill to contact is missing.
No Bill To Customer	Hold is triggered if the bill to customer is missing.
No Product Package Components	Hold is triggered if the line has a product that is a package, and no package components have been chosen.
No Capture Lines	Hold is triggered if the order or quote has no lines.
No Ship To Customer	Hold is triggered if the ship to customer is missing.
No Ship To Contact	Hold is triggered if the ship to contact is missing.
No Sold To Contact	Hold is triggered if the sold to contact is missing.
Product Catalog Violation	Hold is triggered if the product on the line is not in the customer’s catalog.
Product Increment Violation	Hold is triggered if the line quantity is not a multiple of the increment defined on the product definition.

Hold Code	Explanation
Product Prerequisite Violation	Hold is triggered if the product on the line has prerequisites that are not installed, or not on the current capture.
Price List Not Found	Hold is triggered if there is no price list found by the pricing engine.
Line Site Contact Required	Hold is triggered if a product requires a site, and a Site Contact is not one specified.
Line Site Required	Hold is triggered if a product requires a site, and there is not one specified.
Freight Calculation Hold	Hold is triggered if the calculation of freight charges by the third-party system fails.

Note. You can use extend holds processing assuming you have created your own hold codes and extended the application class to run the logic. This is a simple configuration task in the PeopleSoft Order Capture Setup and Capture Type workbenches.

See Chapter 3, "Setting Up PeopleSoft Order Capture," Defining Hold Codes, page 34.

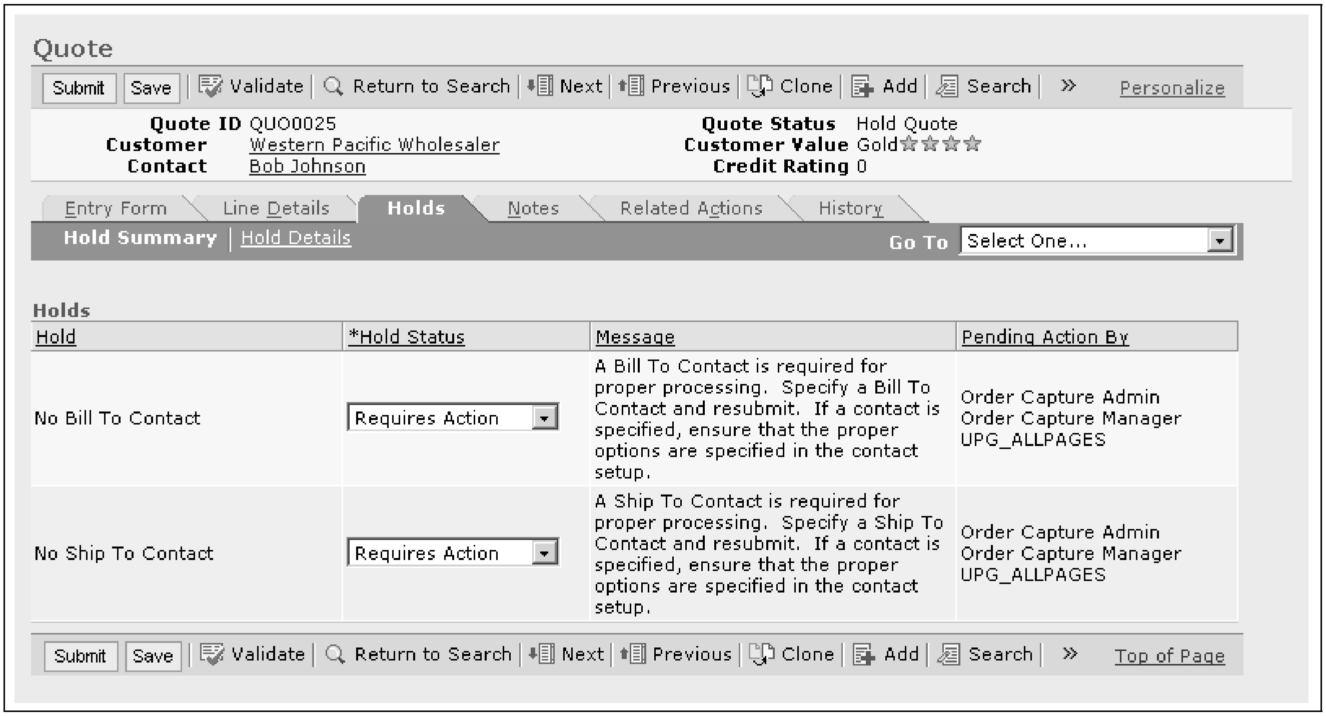
See Chapter 3, "Setting Up PeopleSoft Order Capture," Defining Hold Processing, page 49.

Pages Used to Manage Holds

Page Name	Object Name	Navigation	Usage
Order - Holds (Hold Summary grid), Quote - Holds (Hold Summary grid)	RO_HOLD	• Orders and Quotes, Add Quote, Holds • Orders and Quotes, Add Order, Holds	View holds on the order or quote.
Order - Holds (Hold Details grid), Quote - Holds (Hold Details grid)	RO_HOLD	• Orders and Quotes, Add Quote, Holds Click the Hold Details link. • Orders and Quotes, Add Order, Holds Click the Hold Details link.	View hold details and override the hold, if necessary.

Viewing the Hold Summary

Access the Quote - Holds page: Hold Summary grid.

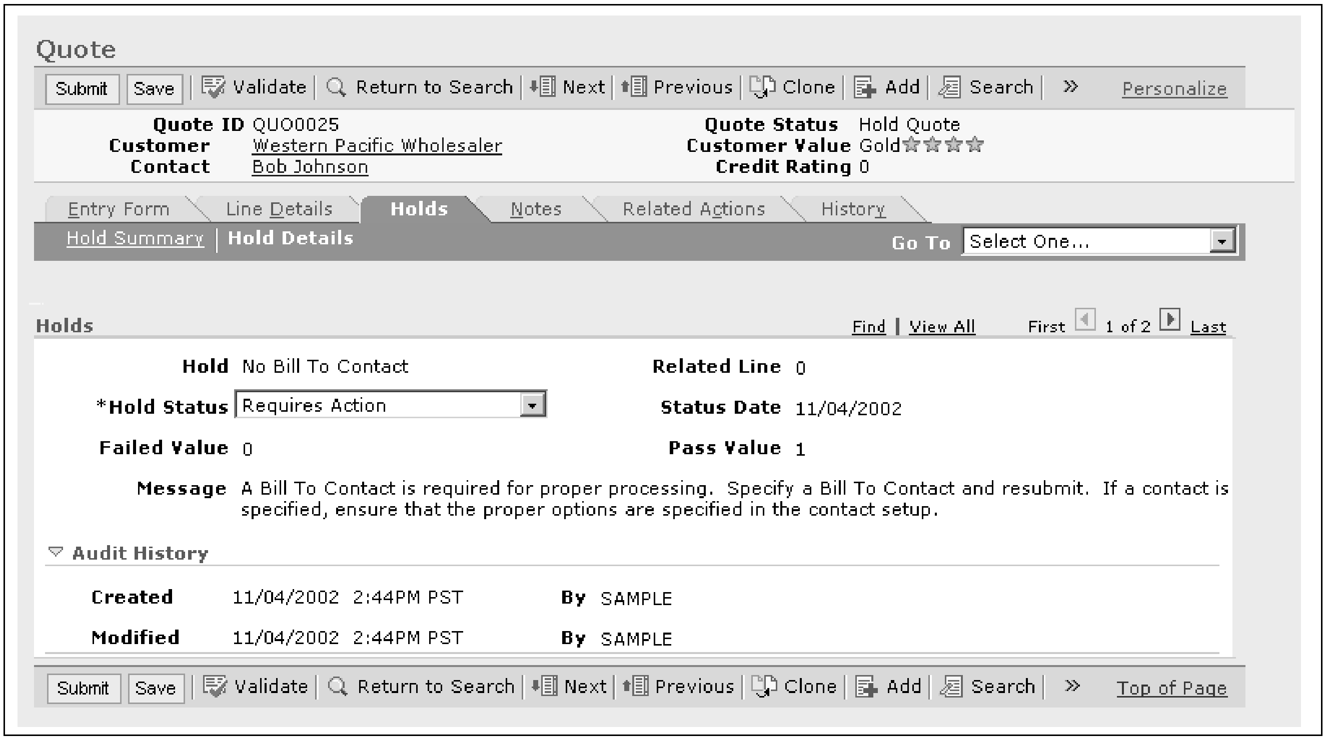


Quote - Holds page: Hold Summary grid

Hold	Displays the description of the hold code.
Hold Status	Displays the hold status. You can change the hold status if your user security allows you to override it.
Message	Displays the explanation of the hold.
Pending Action By	List PeopleSoft roles that can override a specific hold code.

Viewing Details or Removing Holds

Access the Quote - Holds page: Hold Details grid.



Quote page: Holds tab: Hold Details grid

Hold Short explanation of the reason for the hold.

Related Line Line number for the offending product(s).

Hold Status Current status of the hold. This is a display-only field for regular users, such as most customer service contacts. However, users with manager-level permissions can select one of the following statuses:

- *Requires Action:* This selection indicates that action needs to happen. The system defaults to this status when the hold is created.
- *In Process:* This selection indicates that the hold still needs to be addressed and some action is taking place in relation to the hold.
- *Override Hold:* Select to ignore the hold and pass it. For example, you have a minimum price violation but are willing to allow the lower price for this order or quote. When this status is set, the system will no longer check the hold condition.
- *Passed:* This indicates that the hold has passed. The CSR can manually set this status, or the system will set this status when the order or quote has been submitted, and the condition has passed. When this status is set, the system will still check the hold condition, and set to *Requires Action* if the condition fails.

Note. A manager with the correct set of permissions can override the hold by placing the hold in *Override Hold* status and resubmitting the order or quote.

Status Date Indicates the date the Hold status last changed.

Failed Value This is the value that is causing the Hold Reason.

Pass Value This is the value that is required to remove the hold.

Maintaining Orders

In this section, we provide an overview of how you can change orders, and we also explain how to maintain orders, based on fulfillment status.

Understanding Order Maintenance

Order maintenance and quote revisioning are triggered by the same toolbar button. This button allows changes to order data based upon configurable rules defined in the Capture Type Workbench. These rules determine the status of the order, and order lines, and will allow changes to certain data elements based upon this status.

To better understand order maintenance, we must first consider the both the header statuses and the line statuses that we deliver out of the box, and how they map to the PeopleSoft SCM fulfillment system. An order for example cannot be changed if has been shipped, or if the fulfillment system has not acknowledged its existence. In this overview section, let’s provide two tables, one of which explains PeopleSoft Order Capture header statuses. Second, we can look at how line statuses in CRM map to PeopleSoft SCM.

Header Statuses

There following header statuses that can be displayed on the Entry Form:

Header Status	Description
Open	Orders have an Open status after submission but prior to fulfillment. The pricing is locked for quotes.
Pending	Orders and quotes retain a status of Pending, when in edit mode. If you save the order or quote before submission, the order or quote retains the status of Pending. This allows the saving of a draft status.
In Process	Indicates that the order is in the process of fulfillment. Quotes cannot have a status of In Process since quotes are not part of fulfillment.
Hold	Indicates that there is an open hold on the order, based on hold conditions.
Fulfillment Hold	Indicates that the Fulfillment system has placed a hold on the order.

Header Status	Description
Complete	The order has gone through the fulfillment process. It has been shipped, or installed depending upon whether it is a tangible product or a service respectively.
Canceled	Order or quote has been canceled and no further action on this order or quote is necessary.

Line Statuses

The following table shows the delivered line status mappings between PeopleSoft Order Capture and PeopleSoft SCM:

SCM Line Status	CRM Line Status	CRM Line Partial Status
X (Canceled)	1 (Canceled)	1 (Canceled)
Q (Requisitioned)	1000 (Open)	1100 (Partially Open)
U (Purchased)	1000 (Open)	1100 (Partially Open)
B (Backordered)	2000 (Backordered)	2100 (Partially Backordered)
P (Pending)	3000 (Pending)	3100 (Partially Pending)
H (On Hold)	3500 (Fulfillment Hold) **Note.** Holds that originate in CRM have the status, 9000. This is to differentiate a Hold that originated in CRM (status 9000), from a Hold that originated in SCM.	3500 (Fulfillment Hold)
O (In Fulfillment)	4000 (In Fulfillment)	4100 (Partially In Fulfillment)
K (Picked)	5000 (Picked)	5100 (Partially Picked)
C (Closed)	6000 (Shipped)	6100 (Partially Shipped)
S (Shipped)	6000 (Shipped)	6100 (Partially Shipped)

Allowable Maintenance

For the purposes of an integration with PeopleSoft Supply Chain Management, PeopleSoft Order Capture allows you to maintain orders where the header status is at least *Open* (1000) and not yet *Complete* (6000). PeopleSoft Order Capture allows order maintenance out of the box, where PeopleSoft Supply Chain Management is the fulfillment system under the following conditions:

- If the header status is greater than *Open* (1000) but less than *Complete* (6000).
- If the line status is less than *Open* (1000), line configurations and attributes can be changed.
- If the line status is less than *In Fulfillment* (4000), line customer information can be changed.
- If the line status is less than *In Fulfillment* (4000), line pricing data can be changed.

PeopleSoft Order Capture delivers integration points that support a realtime check into inventory to determine if the changes can be made based on the fulfillment status of the order. Additionally, all of the necessary EIPs are delivered to pass the changed data to fulfillment in order to process the change request.

See Chapter 6, “Integrating with Fulfillment and Billing Systems,” Understanding Fulfillment, page 87.

You can add products to an order or quote, change an order or quote, change the dates for a quote, and so on. With related actions, the system keeps a record of and link to the original quote or order, so that you can maintain a history of how the quote or order progressed. Both the revisioned quote and the original quote may be used and both remain in open status. This allows you to offer different revisions of the products and pricing to your customers, and allows the CSR (or sales representative) to order from either of the quotes. Only the revisioned order can be used once changes have been made to the order.

When order maintenance is complete, various order capture pages reflect the change activity. The Summary page now contains a list of all the changes that have been made. Upon order submission, not only is a new business project fired, updating the Related Actions page, but the History page also tracks those changes.

Note. Changes to a quote can be made through the quote revisioning process. Creating a quote revision copies the instance of the quote to a new quote, and increments the revision number. This allows you to modify the quote as required.

See Also

Chapter 6, “Integrating with Fulfillment and Billing Systems,” Activating EIPs, page 91

Chapter 6, “Integrating with Fulfillment and Billing Systems,” Mapping Line Statuses, page 92

Chapter 6, “Integrating with Fulfillment and Billing Systems,” Publishing Order and Quote Messages, page 94

Chapter 6, “Integrating with Fulfillment and Billing Systems,” Subscribing to Order Status Messages, page 99

Viewing Related Actions

This section discusses how to:

- View related actions.
- Work with business projects.

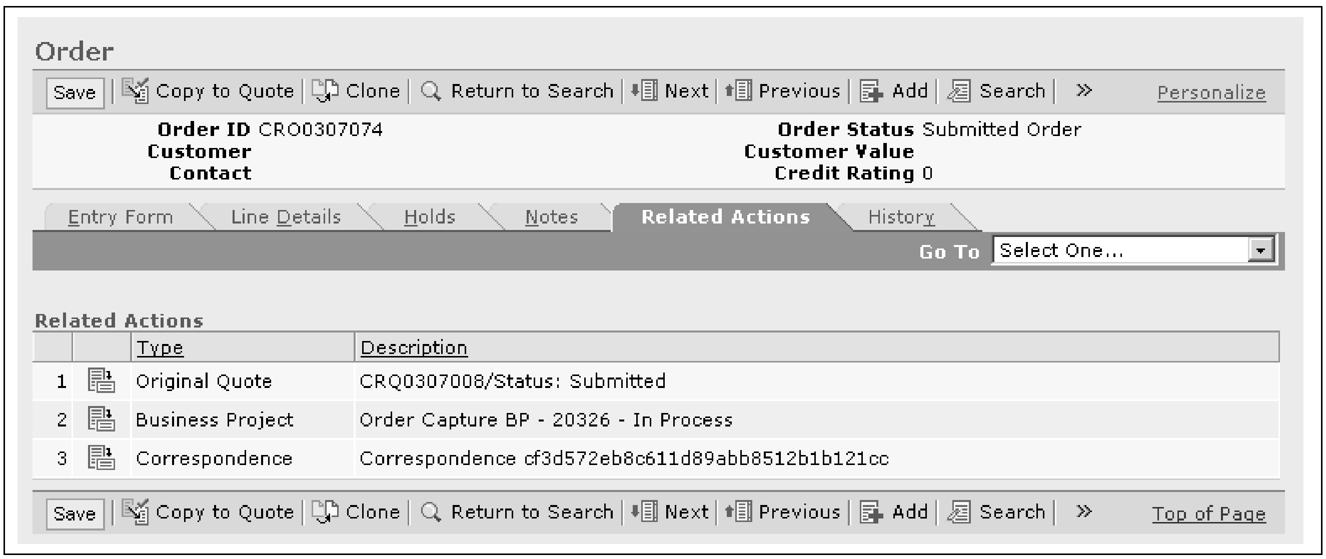
Pages Used to View Related Actions

Page Name	Object Name	Navigation	Usage
Order - Related Actions, Quote - Related Actions	RO_ASSOCIATION	• Orders and Quotes, Add Orders Click the Related Actions tab. • Orders and Quotes, Add Quotes Click the Related Actions tab.	View related actions for orders and quotes.

Viewing Related Actions

This page allows the CSR to view related actions for the order. A related object is data, such as a business project, that is somehow related to the order or quote. This data can reside in another PeopleSoft CRM application.

Access the Order - Related Actions page.



Order - Related Actions page

Click the View Details button to open the related object in a new browser window.

Type

This is the type of business project. Related actions include business objects, upsells, etc.

Working with Business Projects

Business projects help organize process flow and are invaluable in tracing the order change activity. PeopleSoft Order Capture business projects, including Order, Quote, and Order Maintenance business projects, are explained in detail in a preceding chapter.

See Also

Chapter 5, "Working with PeopleSoft Order Capture Business Projects," page 73

Viewing History

You can view history information, which includes all defined audit activity.

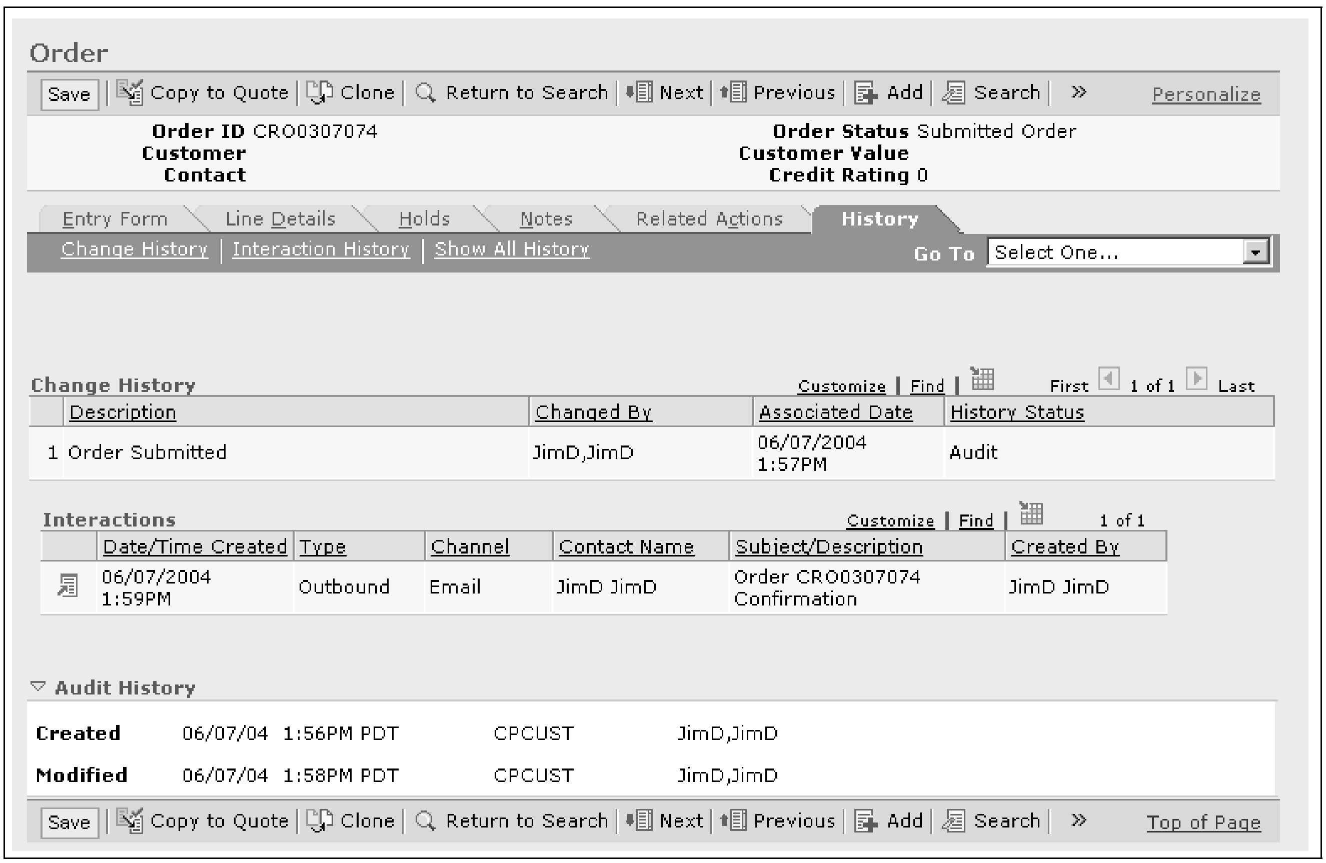
This section discuss the page used to view history.

Pages Used to View History

Page Name	Object Name	Navigation	Usage
Order - History, Quote - History	RO_HISTORY	Orders and Quotes, Search Orders and Quotes Select an order or quote and click the History tab.	For orders and quotes: • View a history of change activity. • View interaction history. • View complete history of activity.

Viewing History Details

Access the Order - History page.



Order - History page

CHAPTER 9

Understanding Order Capture Integration with PeopleSoft Policy and Claims Presentment and PeopleSoft Banking Transactions

This chapter provides overviews of integration functionality, PeopleSoft Order Capture integration with PeopleSoft Policy and Claims Presentment, and PeopleSoft Order Capture integration with PeopleSoft Banking Transactions.

Integration Functionality

Integration of the best features from Order Capture and PeopleSoft industry solutions gives users more than one methold to apply for products or quotes. There are two entry points: the Find Products and Order Capture components. The Order Capture Configurator is used to collect information for product applications and quotes. PeopleSoft takes this functionality one step further by enhancing the component configurations available in the user interface for the Order Capture application.

The high-level functionality provided by this integration are:

- PeopleSoft Policy and Claims Presentment and PeopleSoft Banking Transactions users have more than one method to apply for products or quotes.
- Configurator within PeopleSoft Order Capture will collect information for product applications and quotes.
- Order Capture data model tracks product applications and quotes, as well as supports the re-quoting process.
- Ability to interact with external systems to obtain quotes real-time and save them in the CRM database.
- Ability to track application or quote that resulted in creation of an account or policy.
- Enhanced PeopleSoft Order Capture user interface with flexible configurable options.
- Ability for a partner to request a quote.

Order Capture Integration with PeopleSoft Policy and Claims Presentment

This section discusses the business process model used to integrate PeopleSoft Order Capture and PeopleSoft Policy and Claims Presentment.

Policy and Claims Presentment Business Process Model

There are two methods for initiating a quote application available to Customer Service Representatives (CSRs): 360 - Degree View search page and the Create Order component. The CSR also has two methods of viewing or resuming an incomplete quote application: Identify the customer and select Incomplete Quote from the 360 - Degree View, or navigate to Search Quotes and Orders and search for the incomplete quote by customer name or quote reference number.

The created quotes and policies are displayed on the 360 - Degree View of the customer regardless of what method is used. Each quote goes through various transition stages and diplays a Staus accordingly.

The following table describes the various Staus values of a quote application.

Status	Description
NEW	The status of Quote is *NEW* when CSR clicks on Create Quote and before selecting a product.
INCOMPLETE	A Quote is *Incomplete* when all the needed information for obtaining a Quote is not available.
SUBMITTED FOR QUOTE	This state implies that a request is sent to an external system to get a price for the configured quote. A quote is set to this state when Get Price is clicked.
QUOTED	This state implies a quote is obtained from an external system, but not yet purchased by the customer. A quote is set to this state upon receiving a price from the external system.
QUOTE ACCEPTED	This state implies that a customer has accepted the quote and is willing to purchase. The quote information is sent to external system for policy creation. Quote is set to this state when Buy is clicked
EXPIRED	This state implies a Quote is expired as of expiration date. This state can be achieved by manually expiring the Quotes or a batch process expiring the Quotes.
APPROVED	This state implies that the request for Policy creation is processed by the external system and a Policy is created in CRM system. This status will be set by the inbound async EIP. Also, it implies that a Quote is converted to Application.
REJECTED	This state implies that the request for policy creation is rejected by the external system. This status will be set by the inbound asynchronous EIP.

360 - Degree View Search Page

The customer must be identified clearly with the proper role. The CSR can choose to either search and browse a catalog, or select Create Quote. If the catalog path is chosen, the underlying Order Capture records are created using Component Interface, and one of the methods to collect information is initiated. If Create Quote is selected, the CSR is transferred to the Order Capture component. The actions associated with the selected product are evaluated to determine if a quote can be offered on the product.

Create Order

Selecting the Order Capture component, the CSR or a partner, can choose to identify the customer or create a quote for an anonymous customer.

Products can be selected in the following ways:

- Enter the product and click on Collect Information.
- Search and browse the catalog. When a product is selected, one of the methods to collect information is initiated.
- Select a promotion to add a product and click on Collect Information

PeopleSoft Order Capture Integration with PeopleSoft Banking Transactions

This section discusses the business process model used to integrate PeopleSoft Order Capture with the PeopleSoft Banking Transactions.

Banking Transactions Business Process Model

The same two methods for initiating a quote application in PeopleSoft Policy and Claims Presentment are available to Customer Service Representatives (CSRs) using PeopleSoft Banking Transactions: 360 - Degree View search page and the Create Order component. Because the industries have different business processes, PeopleSoft Banking Transactions initiates an applicaton for products, whereas the PeopleSoft Policy and Claims Presentment business process initiates an application for a quote.

Warning! PeopleSoft Policy and Claims Presentment users apply for a quote application. PeopleSoft Banking Transactions users apply for a product application.

The CSR also has two methods of viewing or resuming an incomplete quote application: Identify the customer and select Incomplete Application from the 360 - Degree View, or navigate to Search Quotes and Orders and search for the incomplete quote by customer name or application reference number.

The created applications are displayed on the 360 - Degree View of the customer regardless of what method is used. Each application goes through various transition stages and diplays a Staus accordingly.

The following table describes the various Status values of a product application.

Status	Description
NEW	The status is *NEW* when CSR clicks on Apply Product and before collecting any information.
INCOMPLETE	An application is *Incomplete* when all the needed information to complete the application is not available. Upon selecting Save for Later, the application is marked incomplete

Status	Description
SUBMITTED	This state implies that the information is sent to external system for Account creation. An Application is set to this state when 'Submit' button is clicked
EXPIRED	This state is when the application for the product has *Expired.*
APPROVED	This state implies that the request for account creation is processed by the external system and an account is created in CRM system. This status will be set by the inbound asynchronous EIP.
REJECTED	This state implies that the request for Account creation is rejected by the external system. This status will be set by the inbound async EIP.

360 - Degree View Search Page

The customer must be identified clearly with the proper role. The CSR can choose to either search and browse a catalog, or select Apply Product. If the catalog path is chosen, the underlying Order Capture records are created using Component Interface, and one of the methods to collect information is initiated. If Apply Productis selected, the CSR is transferred to the Order Capture component. The product actions determine if a quote is required for the selected product.

Create Order

Banking transaction users use PeopleSoft Order Capture to apply for a product application or claims presentment users can obtain a quote application. Use the main order form for both of these types or orders, which is configured differently from a standard order. For instance, the billing section may be turned off via the display templates mechanism. Enter a customer and then select a product. After secting the product, you have the ability to complete the application process using the PeopleSoft Configurator. You can then submit the application from the order capture page.

Order Capture Self-Service for PeopleSoft Banking Transactions and PeopleSoft Policy and Claims Presentment

The high-level functionality provided by this integration are:

- Ability to clone a quote that is associated with the policy and launch Configurator with all known values.
- Able to search for and view product applications or quotes.
- Guest users can search and browse catalogs. In order to apply for a product, the user has to either sign in using an existing account or register.
- Quotes will be created for incomplete applications, with status marked *Incomplete.*

Note. There is no quoting process for PeopleSoft for Banking Transactions. All information is collected before account creation. There are no additional questions asked upon final submission.

See *PeopleSoft Enterprise Policy and Claims Presentment 8.9 PeopleBook*, “Working with PeopleSoft Enterprise Policy and Claims Presentment Self-Service”.

See *PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook*, “Working with PeopleSoft Enterprise Banking Transactions for Self-Service”.

CHAPTER 10

Working with Interactive Reports for PeopleSoft Order Capture

This chapter provides an overview of PeopleSoft Customer Relationship Management (PeopleSoft CRM) interactive reports and discusses how to:

- Set up interactive reports for PeopleSoft Order Capture.
- Use interactive reports for PeopleSoft Order Capture.

Understanding PeopleSoft CRM Interactive Reports

PeopleSoft CRM interactive reports are dynamic and interactive analytic reports. Interactive reports enable you to view and organize data in a wide variety of ways, which provides a more intensive overview of your collaborative selling activity.

You can better manage your sales solution activities by using interactive reports for PeopleSoft Order Capture.

In PeopleSoft Order Capture interactive reports, you can move around data elements on a report and instantly view the report using different dimensions. You can filter interactive reports data by selecting a single value for any dimension. You can also limit the interactive report so that it displays orders or quotes for one customer only. Looking at reports from different angles and perspectives affords an opportunity to gather valuable information about your business.

Interactive reports can be saved, exported to Microsoft Excel, or printed as hard copies. While you can be interactive with interactive reports by moving around data elements (dimensions), the changes that you make on the reports do not affect the PeopleSoft CRM database where the data originated.

PeopleSoft Order Capture Interactive Reports

PeopleSoft CRM Order Capture delivers four interactive reports:

- Order Revenue (for a single business unit).
- Order Metrics (for a single business unit).
- Enterprise Order Revenue (for all business units).
- Enterprise Order Metrics (for all business units).

Enterprise reports can analyze data across the enterprise or by specific business unit. Regular reports are restricted to individual business units. Depending upon the role assigned, users have access to either the two enterprise interactive reports or the two regular interactive reports.

Note. If a user has access to the two enterprise interactive reports, then that user can view analytics for specific business units as well as the entire enterprise.

Access to interactive reports in PeopleSoft Order Capture is determined by user role. It is therefore possible to restrict access to enterprise-wide interactive report information. Review the following table for a list of interactive reports that can be launched by each predefined PeopleSoft Order Capture role:

Role	Enterprise Order Revenue	Enterprise Order Metrics	Order Revenue for Single Business Unit	Order Metrics for Single Business Unit
OCADMIN	No	No	No	No
OCMGR	Yes	Yes	Yes	Yes
OCREP	No	No	No	No

Setting Up Interactive Reports for PeopleSoft Order Capture

This section discusses how to set up PeopleSoft Order Capture interactive reports.

PeopleSoft Order Capture Interactive Reports

There are four interactive reports for PeopleSoft Order Capture that must be set up from within the Analytics Installation Options component. You must set up the model definition, query definition, and data source definition for each of the following:

- CR_RO_ORD_METRICS_BU (Order Metrics for single business unit).
- CR_RO_ORD_REVENUE_BU (Order Revenue for single business unit).
- CR_RO_ORD_METRICS (Enterprise Order Metrics).
- CR_RO_ORD_REVENUE (Enterprise Order Revenue).

Note. The Query Definition page should not require any changes during installation. However, the Model Definitions page requires updates at installation before you can run a PeopleSoft Order Capture interactive report. Use the Model Definitions page to define the interactive reports server name as well as other locations that the runtime uses to launch interactive reports.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Using Interactive Reports”

Using Interactive Reports for PeopleSoft Order Capture

This section provides an overview of the delivered PeopleSoft Order Capture interactive reports.

When you access a interactive report directly from the menu navigation, a run control page appears. You enter the report criteria on this page. Default values for all fields are based on the run control that you last used; if you do not need to change the criteria, one click takes you to the interactive report. Alternatively, you can select a different run control (which updates the default values for the other fields), or you can directly edit the criteria fields.

Profiles are stored by user, which means that users who repeatedly use the same criteria can enter that criteria once. The run control criteria (all fields except the run control name) are shared across all PeopleSoft Order Capture interactive reports. This means that when a run control is created while running a single PeopleSoft Order Capture interactive report, it is still available for all other interactive reports.

Dimensions

Interactive Reports are a combination of *Dimensions* and *Data Cubes*. Dimensions are static categories by which you group data, whereas the data cubes show the actual statistics. You can personalize the look of a interactive report by dragging and dropping the dimensions. Following are the available dimensions for PeopleSoft Order Capture interactive reports:

Currency	Choose the type of currency. You can view only a single currency at a time from within an interactive report. All orders and quotes are captured in the base currency. To see all orders or quotes that were captured in U.S. dollars, select *USD* as the currency, and the orders will be converted into U.S. dollars. To see all of the orders and quotes captured in euros, select *Euros* as the currency.
Business Unit	Select all business units, or choose a specific business unit.
Source	Select all capture sources, or select a single capture source such as *Phone*.
Months	Select the month for which you want to view data. To view all of the data, select *All Months*.
Region	Select the geographic region. This is the region associated with the Sold To customer. This may not be defined for all orders and quotes, so a unique selection of *Not Specified* is used to show the data associated with orders and quotes without a region defined for the Sold To customer.
Capture Type	Select either *All Captures*, *Order*, or *Quote*. To view orders only, select *Order*. To view quotes only, select *Quotes*. Select *All Capture Types* to see both orders and quotes.
Capture Status	Select the status of the orders or quotes?for example, *All*, *Canceled*, *Hold*, *Open*, or *Pending*.

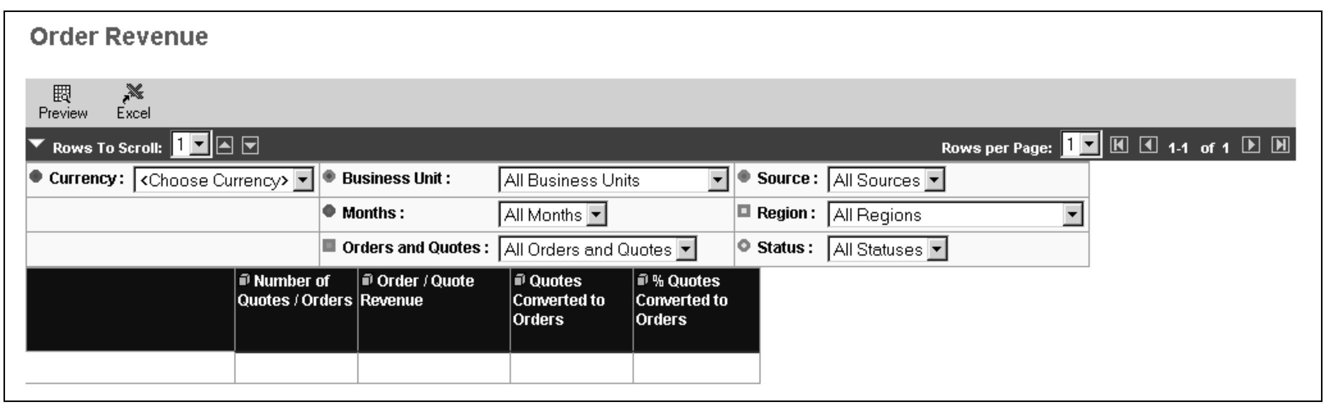
Pages Used to Run Interactive Reports for PeopleSoft Order Capture

Page Name	Object Name	Navigation	Usage
Order Revenue	CR_RO_ORD_REVENUE_BU	Orders and Quotes, Interactive Reports, Order Revenue	Launch the Order Revenue interactive report and view revenue information for a specific business unit.
Order Metrics	CR_RO_ORD_METRICS_BU	Orders and Quotes, Interactive Reports, Order Metrics	Launch the Order Metrics interactive report and view metrics for a specific business unit.
Enterprise Order Revenue	CR_RO_ORD_REVENUE	Orders and Quotes, Interactive Reports, Enterprise Order Revenue	Launch the Enterprise Order Revenue interactive report. You can select values and adjust dimensions to give an overall view of the enterprise. You can also view revenue information by business unit.
Enterprise Order Metrics	CR_RO_ORD_METRICS	Orders and Quotes, Interactive Reports, Enterprise Order Metrics	Launch the Enterprise Order Metrics interactive report. You can select values and adjust dimensions to give an overall view of the enterprise. You can also view metrics by business unit.

Using the Order Revenue Interactive Report

Access the Order Revenue page.

Note. Use the run control criteria of *Start Date* and *End Date* to access this interactive report.



Order Revenue page

Note. The data elements (cubes) on this page are common to both Enterprise Order Revenue (for multiple business units) and Order Revenue for a single business unit.

Number of Quotes/Orders Displays the total number of orders and quotes captured by the system for the dimensions currently selected.

Order/Quote Revenue Displays the total value of the captures, in the selected currency for the dimensions currently selected.

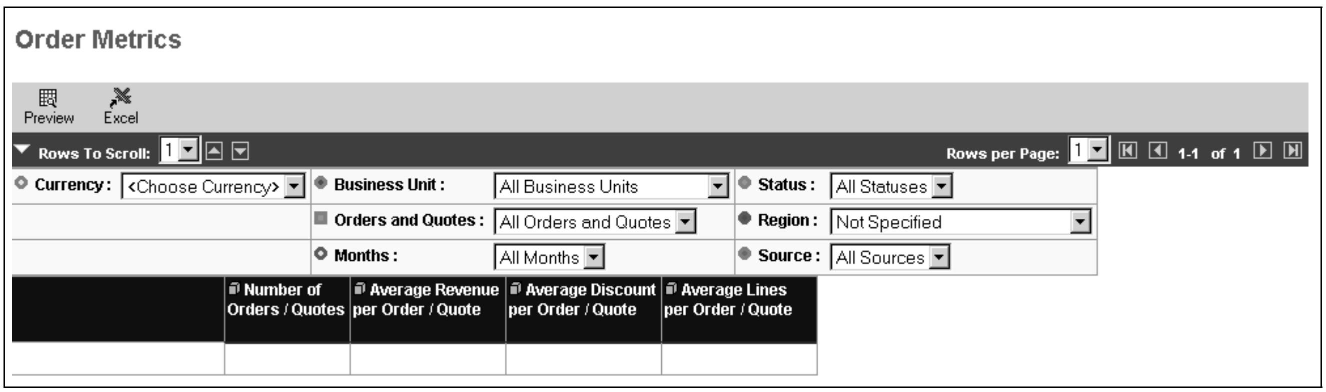
Quotes Converted to Orders Displays the total number of quotes converted to orders for the dimensions currently selected.

% Quotes Converted to Orders Displays the total number of quotes converted to orders divided by the total number of quotes for the dimensions currently selected.

Using the Order Metrics Interactive Report

Access the CRM Collaborative Selling - Order Metrics page.

Note. Use the run control criteria of *Start Date* and *End Date* to access this interactive report.



Order Metrics page

Note. The following data elements (cubes) are common to both the Enterprise Order Metrics interactive report (for multiple business units) and Order Metrics interactive report (for a single business unit).

Number of Orders/Quotes Displays the total number of orders and quotes captured by the system for the dimensions currently selected.

Average Revemue per Order/Quote Displays the average price of captured orders: the cumulative total revenue amount of all captures divided by the cumulative number of captures for the current dimensions.

Average Discount per Order/Quote Displays the average discount applied to your orders. The average discount per capture is the cumulative total price minus the cumulative net price divided by the cumulative number of captures for the current dimensions.

Average Lines per Order/Quote Displays the average lines per capture: the cumulative total of all capture lines divided by the cumulative number of captures for selected dimensions.

Using the Enterprise Order Revenue Interactive Report

Access the Enterprise Order Revenue page.

Note. Use the run control criteria of *Start Date* and *End Date* to access this interactive report.

The Enterprise Order Revenue interactive report essentially offers the same view as the Order Revenue interactive report, but the Enterprise Order Revenue interactive report shows the data across all business units.

Using the Enterprise Order Metrics Interactive Report

Access the Enterprise Order Metrics page.

Note. Use the run control criteria of *Start Date* and *End Date* to access this interactive report.

The Enterprise Order Metrics interactive report offers the same view as the Order Metrics interactive report, but the Enterprise Order Metrics interactive report shows the data across all business units.

PART 3

PeopleSoft Order Capture Self Service

CHAPTER 11

Defining PeopleSoft Order Capture Self Service Business Units

This chapter provides overviews of PeopleSoft business units and PeopleSoft Order Capture Self Service business units and discusses how to define PeopleSoft Order Capture Self Service business units.

Understanding PeopleSoft Business Units

A business unit is an operational subset of your organization. Each business unit has its own way of storing information and each business unit possesses its own processing guidelines. You can use one business unit for all cases, or you can divide your operations based on whatever criteria makes the most sense. For example, you could create business units for different product lines or regions.

Note. PeopleSoft implementation personnel can also help you define the appropriate business unit structure.

Define PeopleSoft business units in this order:

1. Define global PeopleSoft business units, if you run multiple PeopleSoft applications.
2. Define PeopleSoft Customer Relationship Management (PeopleSoft CRM) business units.
3. Define PeopleSoft Order Capture Self Service business units.
4. Link PeopleSoft business units and PeopleSoft CRM business units to PeopleSoft Order Capture Self Service.

Note. Before you create multiple PeopleSoft Order Capture business units, be sure that you understand the concept of *tableSet controls,* the mechanism used to determine valid values for fields on transactional pages.

Understanding PeopleSoft Order Capture Self Service Business Units

PeopleSoft Order Capture Self Service business units provide the necessary defaults that enable self-service transactions, such as order creation and order tracking.

Note. Where applicable, business unit definition records must be synchronized across all systems. Business unit definitions created in PeopleSoft CRM are available in PeopleSoft Supply Chain Management. For fulfillment purposes, PeopleSoft Order Management and PeopleSoft Inventory business unit definitions must also be made available to PeopleSoft CRM. To synchronize business unit records across your business enterprise, use the business unit enterprise integration point.

Defining PeopleSoft Order Capture Self Service Business Units

This section discusses how to create a PeopleSoft Order Capture Self Service business unit.

See Also

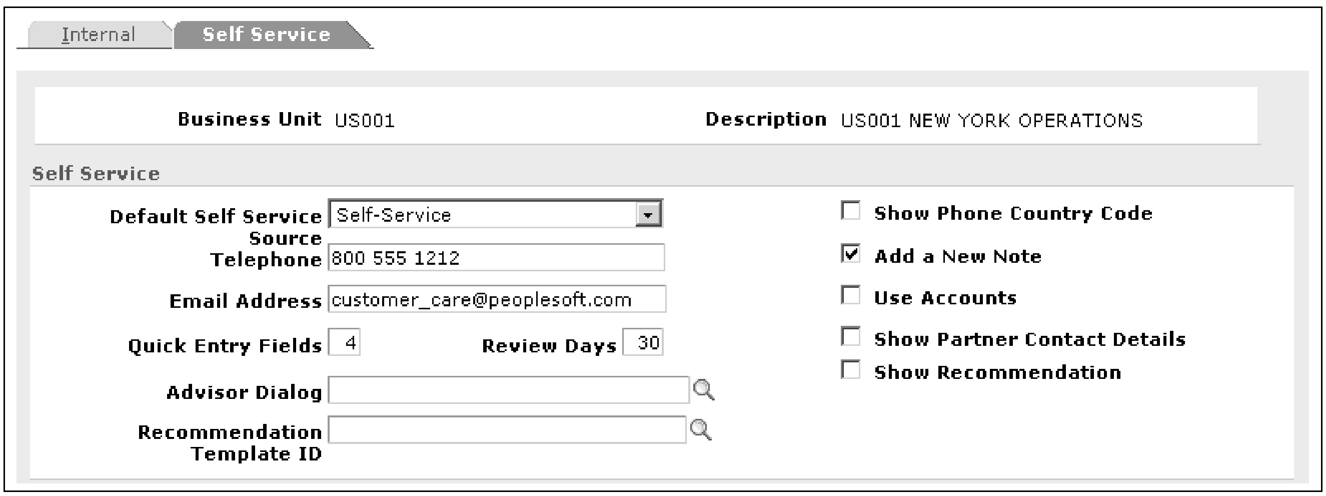
Chapter 2, "Defining PeopleSoft Order Capture Business Units," Defining PeopleSoft Order Capture Business Units, page 16

Pages Used to Define PeopleSoft Order Capture Self Service Business Units

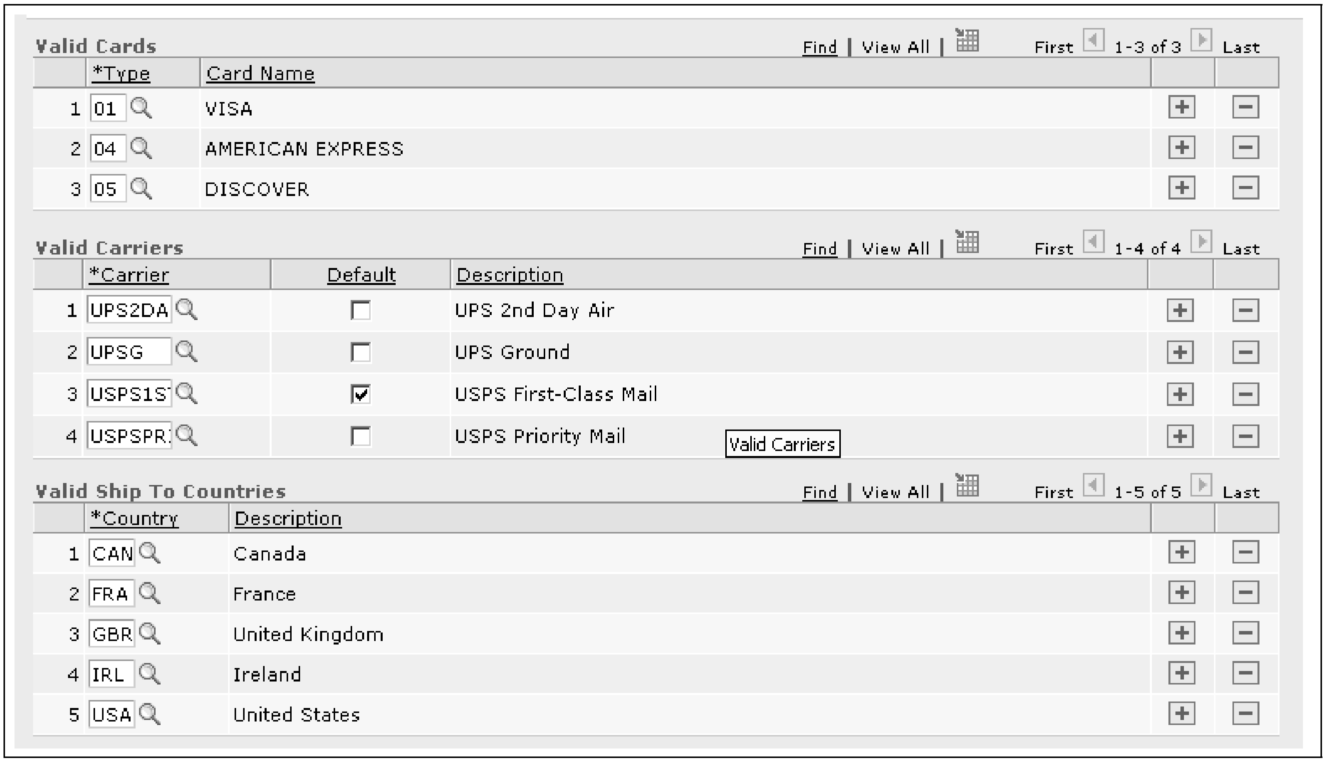
Page Name	Object Name	Navigation	Usage
Self Service Options	BUS_UNIT_RO2	Set Up CRM, Business Unit Related, Order Capture Definition, Self Service, Self Service	Establish valid credit cards, carriers, ship to countries, and other business unit defaults for PeopleSoft Order Capture Self Service.

Creating a PeopleSoft Order Capture Self Service Business Unit

Access the Self Service page.



Self Service page (1 of 2)



Self Service page (2 of 2)

You must first create PeopleSoft Order Capture Business Units using the Internal tab to which you can associate the self service options.

Self Service

Default Self-Service Source Enter a code that identifies the source of the order. Every order generated in PeopleSoft Order Capture Self Service contains the source code that you define here.

Note. If you have both PeopleSoft Order Capture and PeopleSoft Order Capture Self Service, this allows you to differentiate orders that were captured by way of the web channel from orders entered by a customer sales representative or sales representative within your organization.

Show Phone Country Code Select this check box to display country codes in the phone numbers within the address book.

Telephone and **Email Address** Enter a telephone number and email address. The default values entered here are displayed to users when viewing the status of their orders. For example, as a consequence, self-service users might see the following: “If you have questions, contact us at email@message.com or call us at 1 800 555 5252.”

Note. For credit card authorization purposes, CyberSource requires a telephone number and an email address. To guarantee processing, PeopleSoft CRM submits these defaults to CyberSource when an email or phone number was not defined for the person for whom an order was created.

Add a New Note	Select this check box to be able to add notes and attachments to the order in PeopleSoft Order Capture Self Service. If you clear the check box, you are unable to add notes to the order.
Use Accounts	Select this check box to display the additional payment option of *Accounts* in the billing payment section of the order. If you clear the check box, this billing payment subtab will not appear on the order.
Quick Entry Fields	Enter the number of blank rows available by default when users select the Quick Order Entry option.
Review Days	Enter the number of default days that you want to make viewable to users when they first view order and quote status.
Show Partner Contact Details	Click this check box to display information that can be made available on the self service pages about products if the order is taken by a partner company.
Advisor Dialog	Select from your predefined advisor dialogs to provide the advisor dialog to fire for the recommendations section of the Find Products page.
Show Recommendation	Select this check box to enable recommendations to customers for a current product choice. Recommendations are determined by the product recommendation functionality that is a part of the Find Products page. The functionally uses any existing defined advisor dialog to make recommendations. This is done in real time and the self-service user does not have to answer any questions at the time. The results are based on previous advisor sessions and customer details as defined in the advisor dialog.
Recommendation Template ID	Select a template for the business unit level that determines your desired format or customer requirements for the display of recommendation information on self-service pages.

Valid Cards, Valid Carries, Valid Ship To Countries

Define your valid credit cards, valid carriers, and valid Ship To countries in the appropriate section on this page. Identify the default carrier in the Valid Carriers group box. Values will then be available for selection in the appropriate drop-down list box at runtime.

CHAPTER 12

Setting Up PeopleSoft Order Capture Self Service

This chapter provides a checklist of steps required to set up PeopleSoft Order Capture Self Service. Since most of this involves setting up options that are also required for PeopleSoft Order Capture, we have referenced that documentation here using direct links.

Once you have defined self-service business units, PeopleSoft Order Capture Self Service requires that you set up each of the following, in the order listed:

- Products.
- Pricing.
- Catalogs.
- PeopleSoft Order Capture Setup Workbench options.
- PeopleSoft Order Capture Type Workbench options.
- PeopleSoft Order Capture Integration Workbench options.
- Carrier definitions.
- Credit cards.
- Tax provider options.
- Consumer and business registration.
- Anonymous user access (guest user access).

Note. Each of these setup elements is explained in detail in the following sections.

See Also

PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook, "Setting Up Products"

PeopleSoft Enterprise Pricer 8.9 PeopleBook

PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook, "Creating Catalogs"

Chapter 3, "Setting Up PeopleSoft Order Capture," Setting Up PeopleSoft Order Capture Tables, page 27

Chapter 3, "Setting Up PeopleSoft Order Capture," Defining Order and Quote Processing, page 46

Chapter 3, "Setting Up PeopleSoft Order Capture," Defining Integrations and Mappings, page 57

Chapter 3, "Setting Up PeopleSoft Order Capture," Setting Up Freight Integration, page 62

Chapter 3, "Setting Up PeopleSoft Order Capture," Setting Up Credit Card Integration, page 61

Chapter 3, "Setting Up PeopleSoft Order Capture," Defining Tax Installation Options, page 66

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "Setting Up Customer Self-Service"

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "Setting Up PeopleSoft Customer Relationship Management Security and User Preferences," Implementing Self-Service Security

CHAPTER 13

Using PeopleSoft Order Capture Self Service

This chapter provides an overview of PeopleSoft Order Capture Self Service, delivered user ID and user role identification, and supplemental pagelet identification, and discusses how to:

- Select products.
- Use Quick Entry.
- Use the shopping cart.
- Manage checkout.
- View order or quote status.

Understanding PeopleSoft Order Capture Self Service

PeopleSoft Order Capture Self Service delivers an intuitive interface that allows consumer users, company representatives, and brokers to easily create and manage the web channel. PeopleSoft Order Capture Self Service synchronizes with PeopleSoft Order Capture to allow self service users to track all orders, whether created by a customer service representative, an agent through the call center, or by themselves through the web.

PeopleSoft Order Capture Self Service works in conjunction with the following CRM features, some of which are common to all self service applications, and others which specifically complement PeopleSoft Order Capture Self Service:

- Security elements, including the defining of user roles and associated permissions.
- Address book.
- Sign in.
- Registration.
- Profile maintenance.
- Contact Us and Chat.
- Attributes.
- Product catalog.
- Search Catalog.
- PeopleSoft Advisor.
- PeopleSoft Configurator.

Note. Functionality that is common to both PeopleSoft Order Capture and PeopleSoft Order Capture Self-Service, such as integration with order fulfillment, pricing, freight, and tax integration, is documented in previous chapters of the this book.

See Also

PeopleSoft Enterprise CRM Real-Time Advisor 8.9 PeopleBook

PeopleSoft Enterprise CRM Advanced Configurator 8.9 PeopleBook

Understanding Delivered User ID, User Role Identification and the Creating of Passwords

This table shows the users and roles that PeopleSoft Order Capture Self Service delivers. You can adopt these particular users and roles, or you can modify them to better suit your business needs.

Note. To modify permissions for these delivered user roles, navigate to PeopleTools, Security, Permissions & Roles, Roles.

User ID	Role Name	Role Description	Access
GUEST	Guest	An anonymous user that accesses the web channel.	Guests have access to the Sign In & Registration, Products and Services, Catalog Search, Shopping Cart, and Site Selection pages.
CPSS, CPSS2	Consumer	A consumer that represents him- or herself.	Consumers have guest privileges without the sign-in (and registration) options. They also have access to the Customer Care, Order Status, Quote Status, Profile Maintenance, and Contact Us pages.

User ID	Role Name	Role Description	Access
CPCUST, CPCUST2	Customer	A customer represents a single customer.	Customers have all consumer privileges as well as quick entry privileges.
CPBRKR, CPBRKR2	Broker	A broker represents multiple customers.	Brokers have all customer privileges plus customer selection privileges. Customer selection privileges allow brokers to select the customer that they want to represent for a particular session.

Note. User IDs that end with a *2* are associated with the CRM01 setID.

Setting Password Expiration and Changing Passwords

To set the internal self-service password expiration date to one other than the external date , navigate to Set Up CRM, Security, Self-Service, User Registration.

The password expiration options are accessed in the Password Security Policies group box of the User Registration page. The options enable you to setup your password expiration policy. For example, the internal passwords might be set to expire every 60 days while the setting for the external passwords might be set to never expire. In the Password Security Policies group box a password can be set to never expire by selecting the password Never Expireradio button, or the password can be set to expire by selecting the *Password Expires* radio button and entering the number of days until expiration in the associated field. A password expiration date is calculated based on the last password change date as determined from the tools PSOPRDEFN table.

When the password expires and you click the Sign In button on the Sign In page, you are presented with the Change Password page. Here you enter your old password, your new password and enter the new password again to confirm it. Click the Save button or if it becomes necessary, you can cancel and return to the sign in page.

Understanding Supplemental Pagelet Identification

PeopleSoft Order Capture Self Service delivers these pagelets, which are enabled by the PeopleSoft Order Capture Self Service product, as part of the PeopleSoft CRM Portal Pack:

- Catalog Search (RX_PROD_SRCH_PGT).
- Shopping Cart (RE_CART_PGT).
- Recent Orders (RE_C_ORD_PGT).
- Recent Quotes (RE_C_QUO_PGT).

Selecting Products

This section discusses how to:

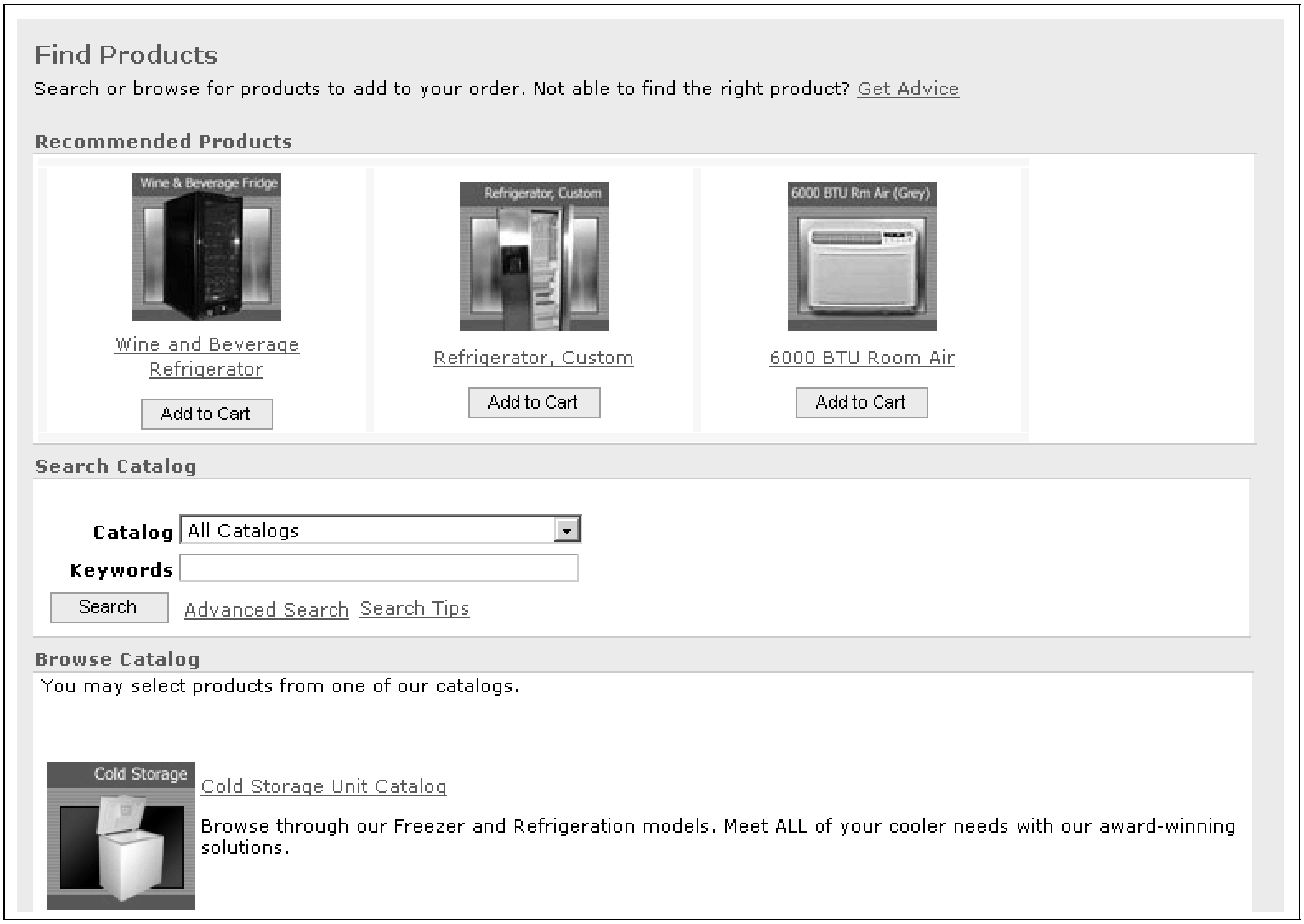
- Find products.
- Choose a product.
- View product details.
- Compare products.
- Launch PeopleSoft Advisor.

Pages Used to Select Products

Page Name	Object Name	Navigation	Usage
Find Products	RX_PROD_SRCH	Find Products	Search a particular catalog or browse all catalogues, get advice on products, and create an order or quote capture.
Product Catalog	RB_CATALOG	On the Find Products page, click a catalog link.	View and select a product.
Product Details	RB_PROD_DTL	On the Catalog page, click a product link.	View product details, select a quantity, change units of measure, and add the product to the shopping cart.
Product Comparison	RB_CATALOG	On the Catalog page, select up to three Compare check boxes. Click the Add to Compare Pad button.	Compare as many as three products.
PeopleSoft Advisor	RAD_ADVISOR _RUN	On the Find Products page, click the Get Advice link. On the Catalog page, you can also click the Need help choosing a product? link.	Launch the PeopleSoft Advisor, answer the questions in the dialogue presented and receive a personalized recommendation.

Finding Products

Access the Find Products page.



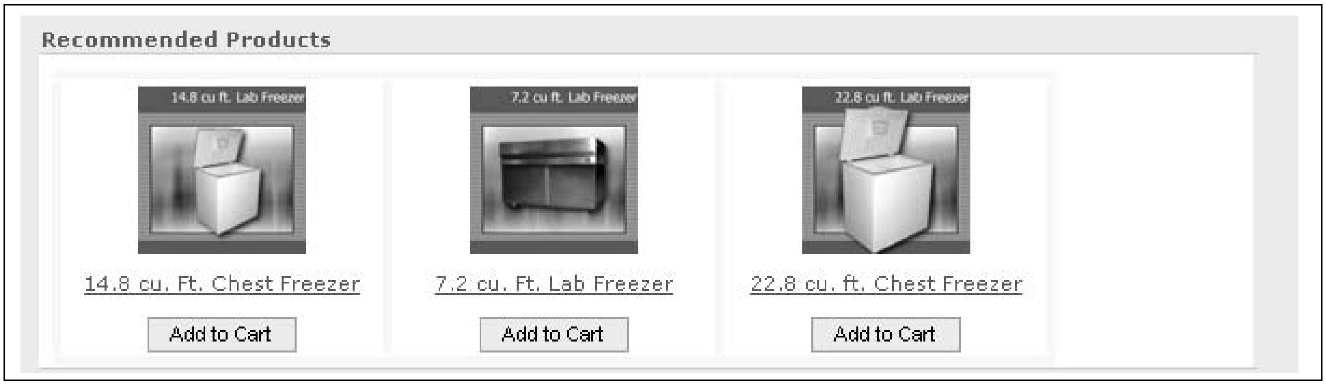
Find Products page

This page provides several methods to find products.

- Click the Get Advice link when you are unsure of the product or type of product that you need and the system will guide you in selecting the appropriate item through an Real-Time Advisor dialogue consisting of a series of questions and answers.
- The system can present you with recommended products based upon your prior ordering activity.
- Select and search a particular catalogue and when you have enough information to provide definitive search criteria, use the Advanced Search link to search on such things as keywords, brand name, descriptions and product ID.
- Select catalogue links to browse listed catalogues.

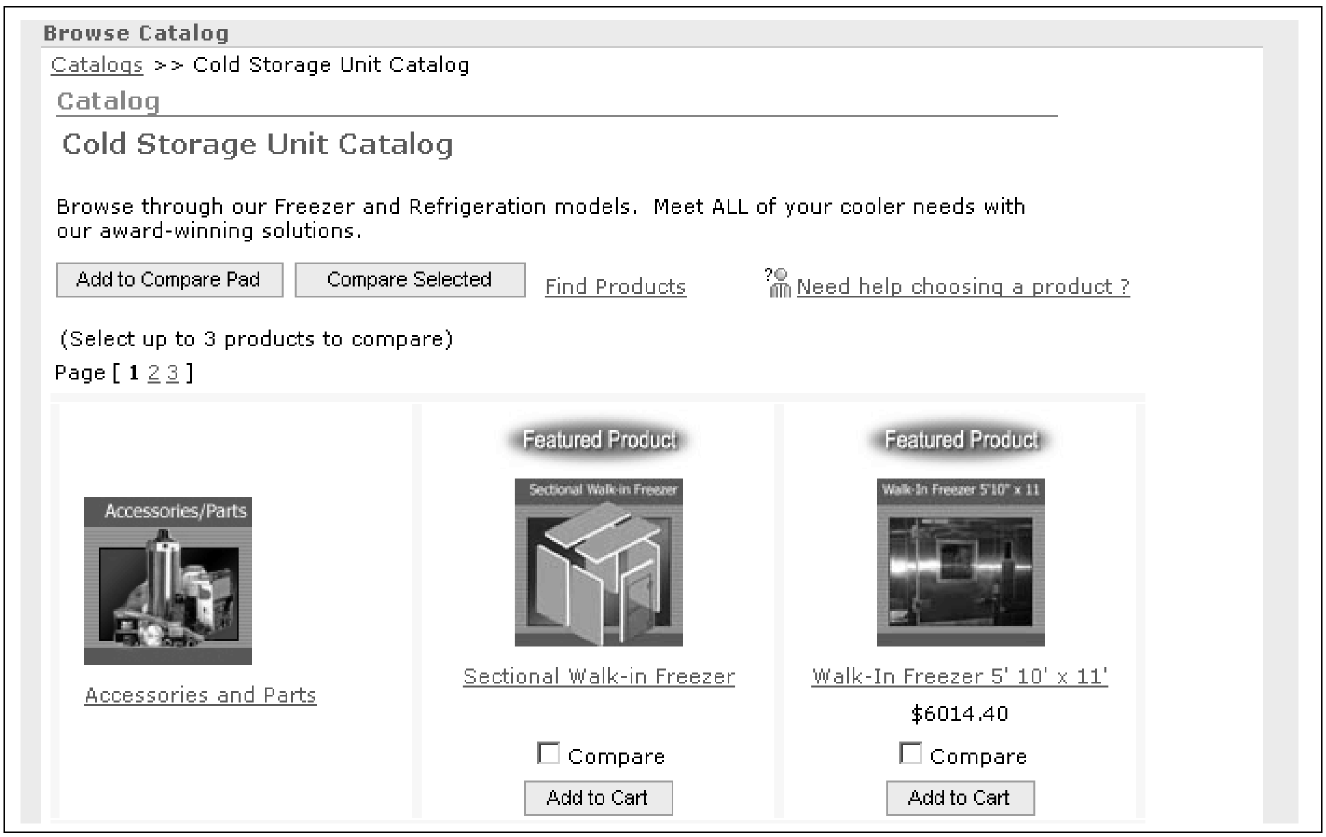
Choosing a Product

Access the Product Catalog page.



Product Catalog page (1 of 2)

Recommended Products The system uses the Real-Time Advisor product to recommend products selected for your consideration. These products are selected based on the Advisor Dialog defined on the Business Unit.



Product Catalog page 2 of 2

Browse the catalog using the Page link to view the pages of the catalogue.

Compare and **Add to Compare Pad** Select a Compare check box for more than one product. Click the Add to Compare Pad button. Using the Page links and the Add to Compare button enables you to add products from multiple pages within the catalog to the comparison.

Compare Selected

Click this button and the system compares up to three products at a time from the compare pad. This is based on the display template that is set up for the product catalogs.

Find Products

Click this link to return to the Find Products page.

Need help choosing a product?

Click to launch the PeopleSoft Real-TimeAdvisor. PeopleSoft Real-Time Advisor asks a series of questions that returns product recommendations based on your answers to the questions.

Featured Product

The system can highlight various products and distinguish them as featured products in the various catalogues.

However, you can click any product link to access its Product Detail page. For example, if you click the Walk-In Freezer 5’ 10’ x 11’ product link, you can access the Product detail page for this product and its associated agreements and enhancements.

Viewing Product Details

Access the Product Detail page.

Product Detail page 1 of 2

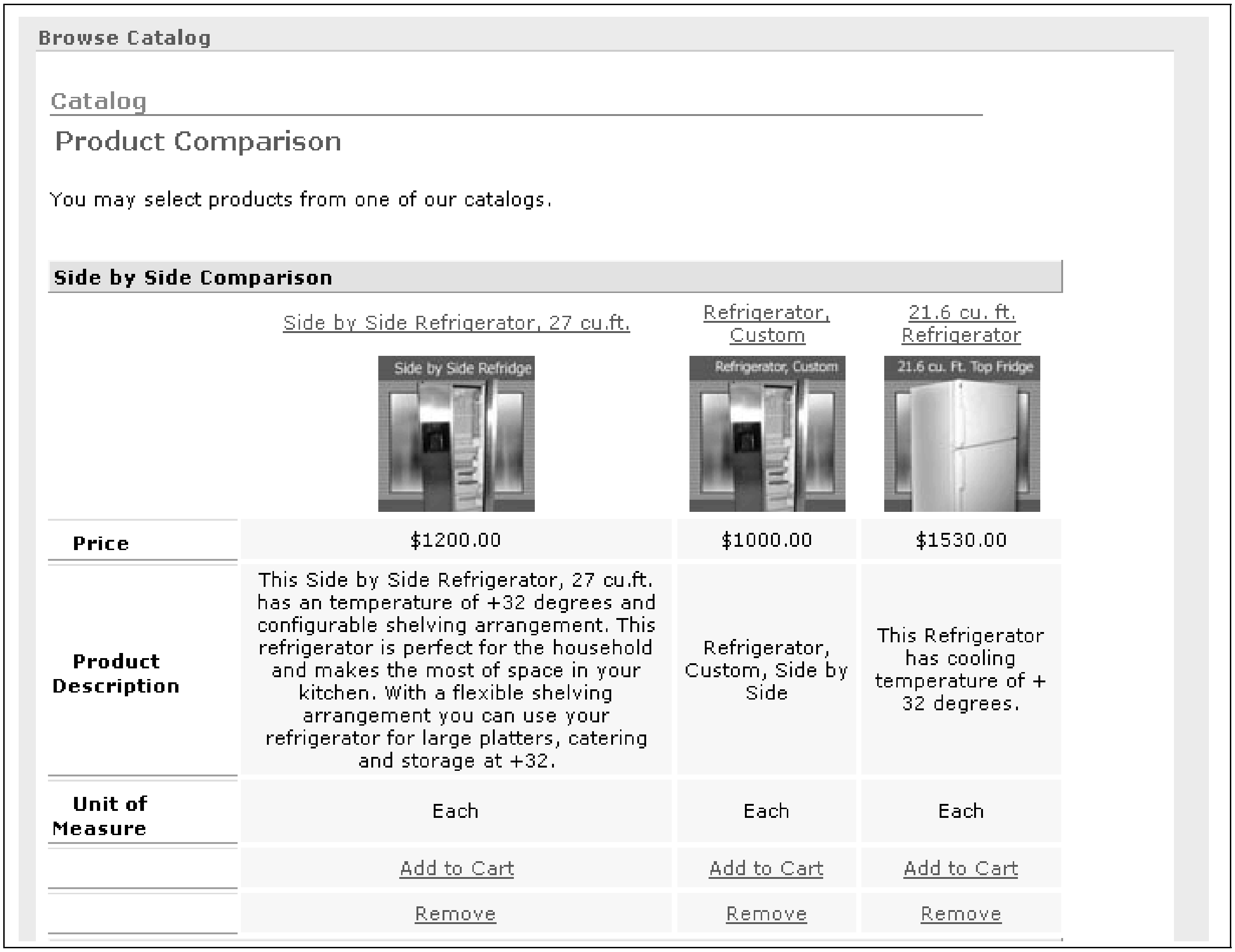
Product Detail page 2 of 2

Agreements for this product and **Enhance this product with these additions**	Click to see links for such things as preventive maintenance or service agreements and enhancement for the product selected and then click the item links to see detailed information about the available agreements and enhancements.
The next step up from this product	Select this link to see products that are considered a step up from the product you are currently considering—perhaps for quality, size or capacity.

Note. You can access Product Details from several pages, including the Catalog, Shopping Cart, Checkout, and Order/Quote Status pages.

Comparing Products

Access the Product Comparison page.



Browse Catalog

Catalog

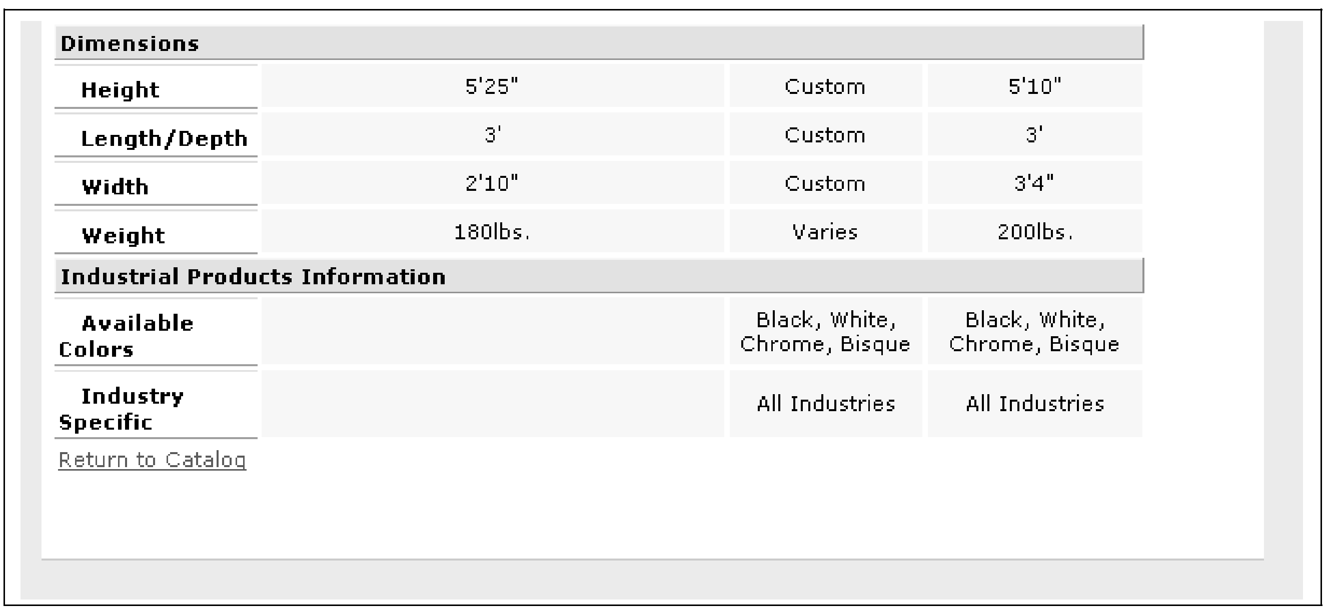
Product Comparison

You may select products from one of our catalogs.

Side by Side Comparison

	Side by Side Refrigerator, 27 cu.ft.	Refrigerator, Custom	21.6 cu. ft. Refrigerator
	Side by Side Refridge	Refrigerator, Custom	21.6 cu. Ft. Top Fridge
Price	$1200.00	$1000.00	$1530.00
Product Description	This Side by Side Refrigerator, 27 cu.ft. has an temperature of +32 degrees and configurable shelving arrangement. This refrigerator is perfect for the household and makes the most of space in your kitchen. With a flexible shelving arrangement you can use your refrigerator for large platters, catering and storage at +32.	Refrigerator, Custom, Side by Side	This Refrigerator has cooling temperature of + 32 degrees.
Unit of Measure	Each	Each	Each
	Add to Cart	Add to Cart	Add to Cart
	Remove	Remove	Remove

Product Comparison page (1 of 2)



Dimensions			
Height	5'25"	Custom	5'10"
Length/Depth	3'	Custom	3'
Width	2'10"	Custom	3'4"
Weight	180lbs.	Varies	200lbs.
Industrial Products Information			
Available Colors		Black, White, Chrome, Bisque	Black, White, Chrome, Bisque
Industry Specific		All Industries	All Industries

Return to Catalog

Product Comparison page (2 of 2)

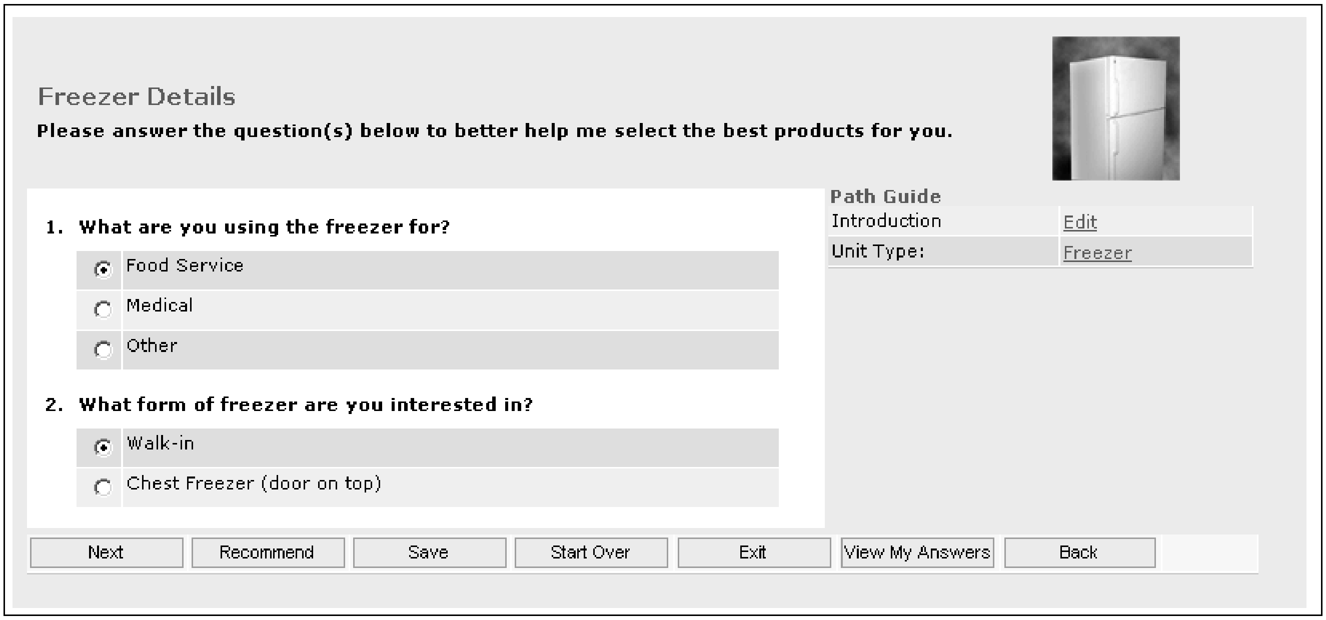
Add to Cart Add the product to your shopping cart.

Remove Click to remove a product from the current comparison.

Return to Catalog Click to return to the catalogue where you can add other products for a total of three products for any one comparison.

Launching PeopleSoft Real-Time Advisor

Access the PeopleSoft Advisor page.



PeopleSoft Advisor page

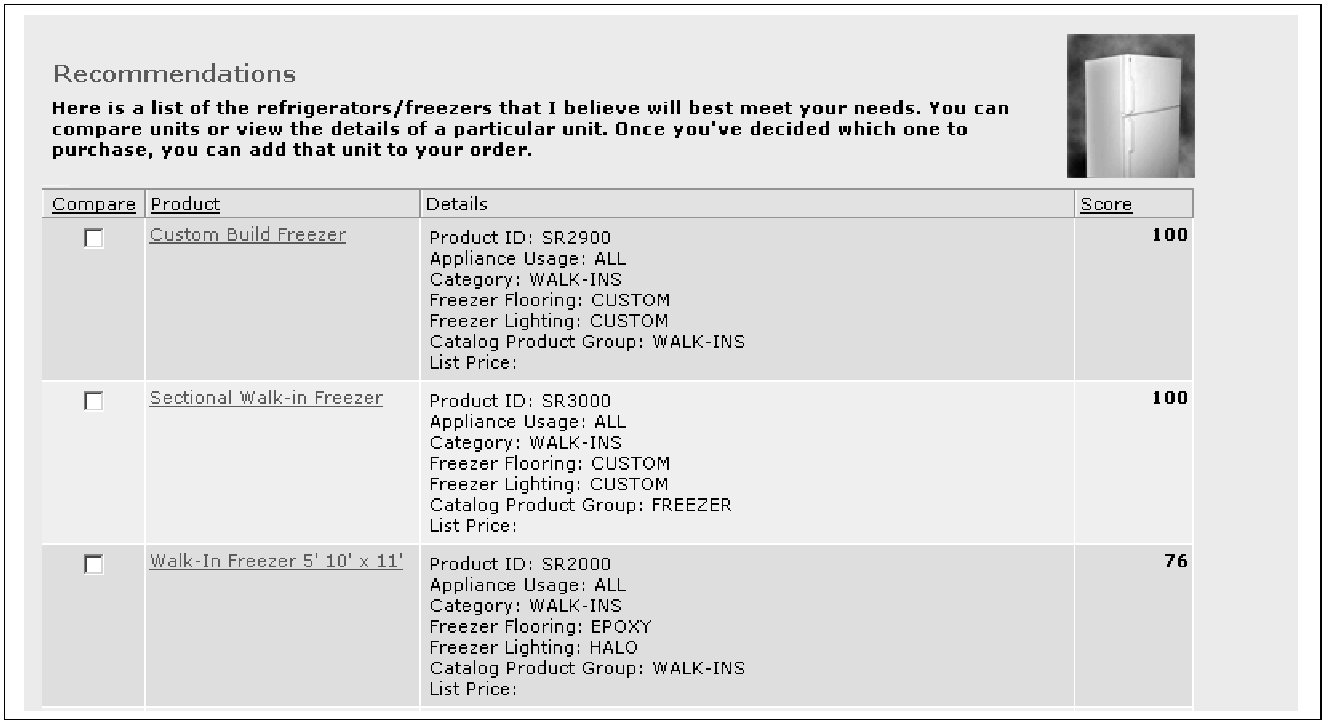
Next After selecting or entering your applicable response, click to move to the next dialogue in the series of the advisor's questions.

Save Click to save your responses to complete or modify at another time.

Recommend Click to access the advisor's product recommendations based on you answers to the advisor dialogue.

Recommendations

Select the Recommend button on the Advisor page



PeopleSoft Advisor — Recommendations page

Score The system displays suitable products and scores them based on how well these products fit your responses to the advisor’s questions.

Using Quick Order Entry

This section provides an overview of Quick Order Entry and discusses how to select products quickly.

Understanding Quick Order Entry

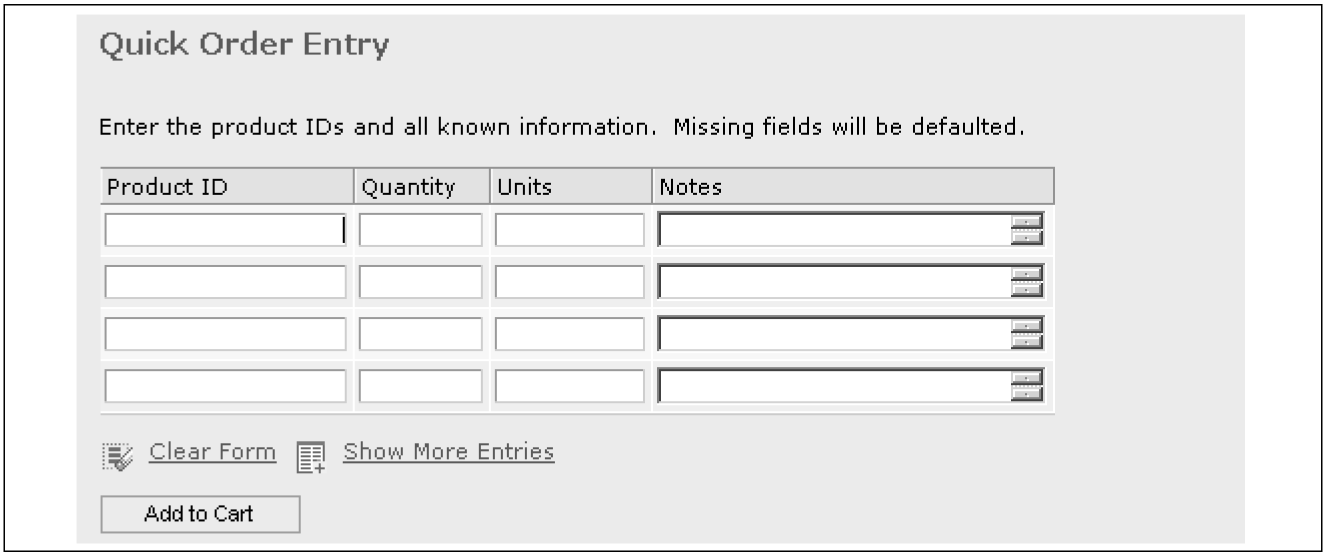
There are two ways to add products to the shopping cart: from the Product Details page or from Quick Order Entry page. Quick Order Entry is intended for users who are familiar with the products and the product IDs that they order. Quick Order Entry delivers a simple form to support speedy entry of product information.

Page Used to Use Quick Order Entry

Page Name	Object Name	Navigation	Usage
Quick Order Entry	RE_QUICK_ENTRY	Click the Quick Order Entry link on the Main Menu.	Create orders or quotes rapidly when you are familiar with the product and already know the product ID.

Selecting Products Quickly

Access the Quick Order Entry page.



Quick Order Entry page

Product ID Enter the product ID.

Quantity Enter a quantity. If you do not select a quantity, a quantity of *1* defaults into the shopping cart.

Units Enter either the unit of measurement (UOM) code (such as *ea.*) or the UOM description (such as *each.*)

Notes Add notes, which appear for the specified product when you access the shopping cart.

Using the Shopping Cart

This section provides an overview of the shopping cart and discusses how to:

- Work from within the shopping cart.
- Delete products from the shopping cart.
- Add notes or attachments.

Understanding the Shopping Cart

The shopping cart displays all of the products that you select for an order or quote. You can perform these operations from the Shopping Cart page:

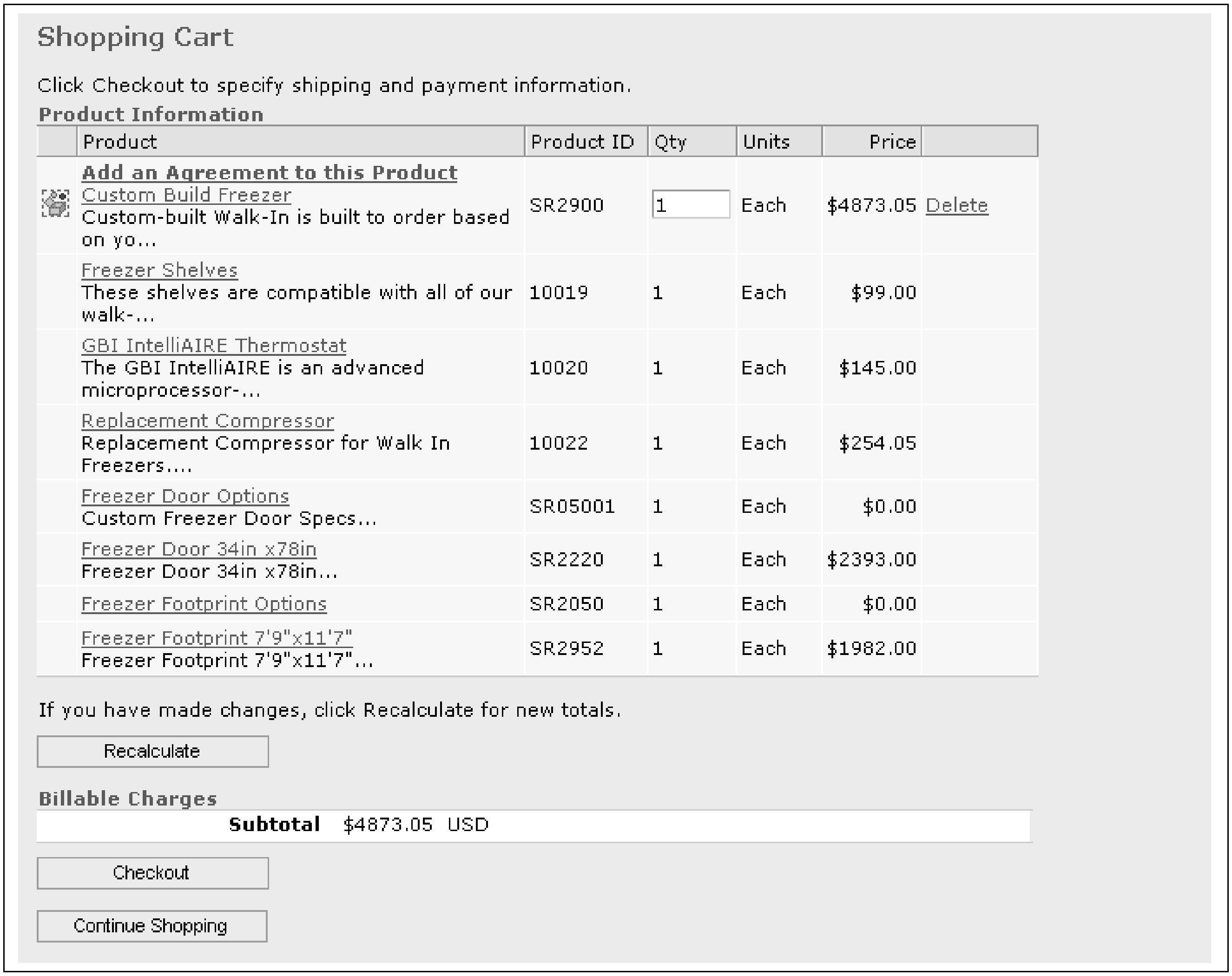
- Update quantity and recalculate price.
- Configure products or packages.
- Add notes and attachments to an order.
- Remove products.
- Proceed to checkout.

Pages Used to Access and Use the Shopping Cart

Page Name	Object Name	Navigation	Usage
Shopping Cart	RE_CART	Quick Order Entry Click the Add to Cart button. Find Products, Select product Click Add to Cart. Checkout Select Change Order link. Shopping Cart pagelet, Click Checkout. (If portal pack is installed)	View the contents of the shopping cart, and then proceed to checkout.
Delete Confirmation	RX_DELETE_CONFIRM	Click the Delete link on the Shopping Cart page. Shopping Cart, Notes & Attachments, Click Delete Attachments.	Confirm the removal of products (or notes and attachments) from the shopping cart.
Notes & Attachments (notes and attachments)	RE_NOTES	Shopping Cart, Add Notes & Attachments Notes & Attachment link	Add a note or an attachment to the products that are being ordered.

Working from within the Shopping Cart

Access the Shopping Cart page.



Shopping Cart page

Click the product's name link to view product details.

Add an Agreement to this Product

Click if you choose to add available agreements, such as a consulting, preventive maintenance, or service agreement for a selected product. Because it is often crucial that certain agreements be ordered with the initial purchase of a product, this is a second opportunity to choose agreements. This option is first presented on the Product Details page.

Qty (quantity)

Update the quantity of a product.

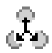
Click the Recalculate button to determine new total charges.

Delete

Click this link to remove the line item from the shopping cart.

Click the Recalculate button to determine new total charges.

Note. When you delete a product all associated agreements for that product are also deleted by the system. Enhancements are not automatically deleted. You must delete them individually using the Delete link on the Shopping Cart page.

	Click to configure when the product is a dynamic package having various options that you must choose, such as when a product must be custom built. When you have configured the product with its various options, a composite price is calculated by the system. This icon is not available or applicable to all products. See *PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook*, “Setting Up Products,” Defining Product Package Components.
	Click to fully configure a ready made product with optional features. This icon is displayed only when applicable and is not available for all products. See *PeopleSoft Enterprise CRM Advanced Configurator 8.9 PeopleBook*.
Recalculate	Click to recalculate the price when you make changes to your selections, such as increasing or reducing the quantity of a product or after removing a product.
Checkout	Proceed to checkout.
Continue Shopping	Return to the catalog to select additional or different products. When you click the Continue Shopping button, the system retains the existing contents of your shopping cart.

Note. When you have a configurable product or package in your shopping cart, it must be configured before you proceed to checkout. If a product has required attributes, you must specify the attribute value before you can proceed to checkout.

Deleting Products from the Shopping Cart

Access the Delete Confirmation page.

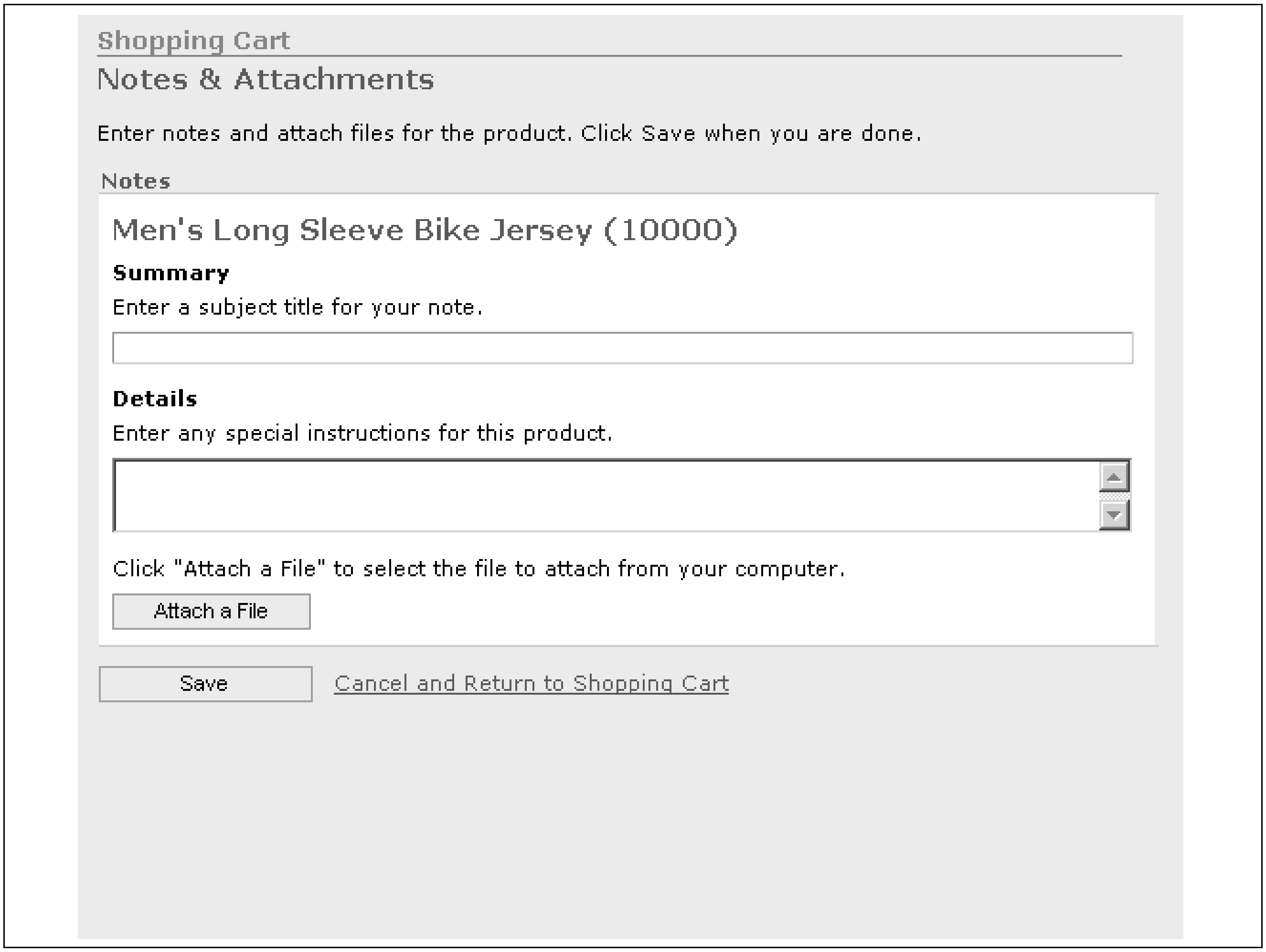
Delete Confirmation page

Click the Delete link on the Shopping Cart page to access the Delete Confirmation page, where you can delete shopping cart contents.

Note. When you delete a product any associated *agreements* are also deleted. However, you must delete any associated enhancements for the deleted core product that you have previously included in your shopping cart.

Adding Notes or Attachments

Access the Notes & Attachments page.



Notes & Attachments page

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Working with Notes and Attachments”

Managing Checkout

This section discusses how to:

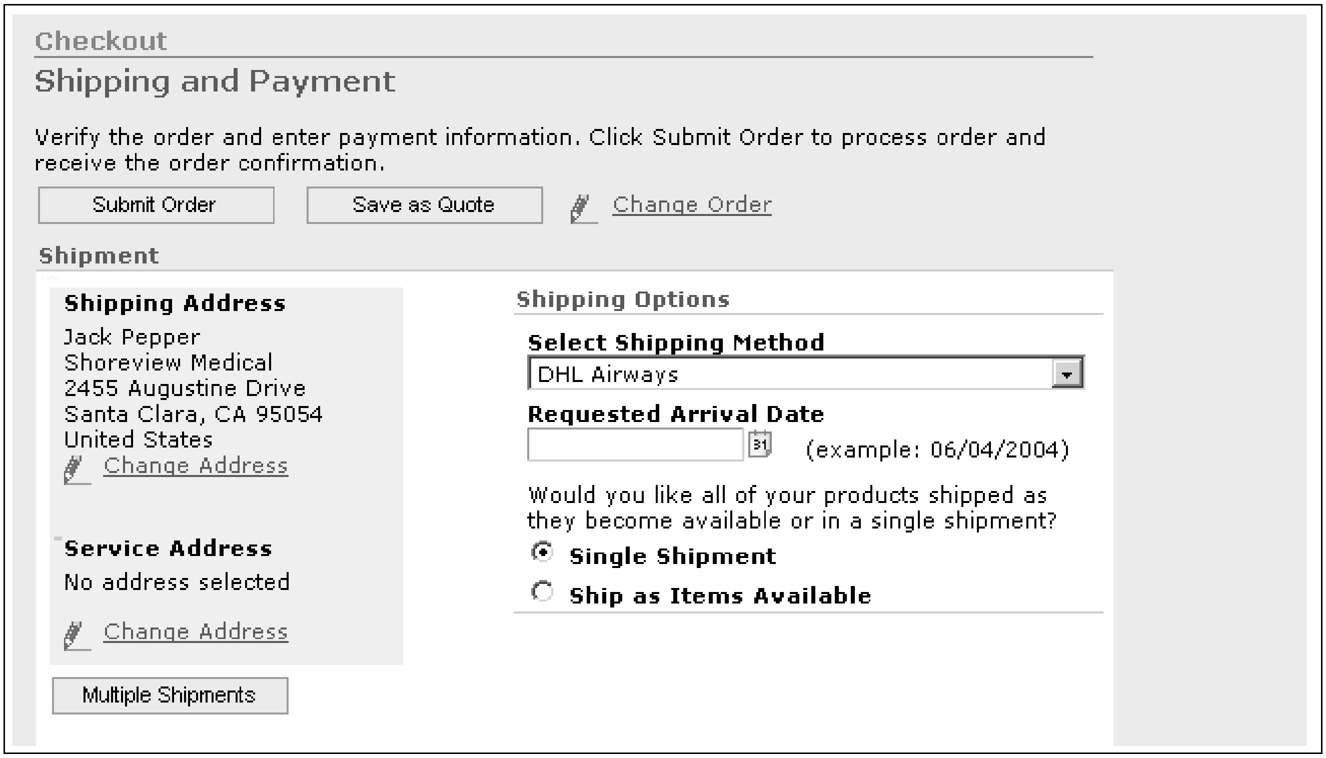
- Manage shipping, product, and payment options from the Checkout page.
- Handle multiple shipments.
- Access and change product attributes.
- Receive an order or quote confirmation.
- Change a submitted order derived from a quote.

Pages Used to Manage Checkout

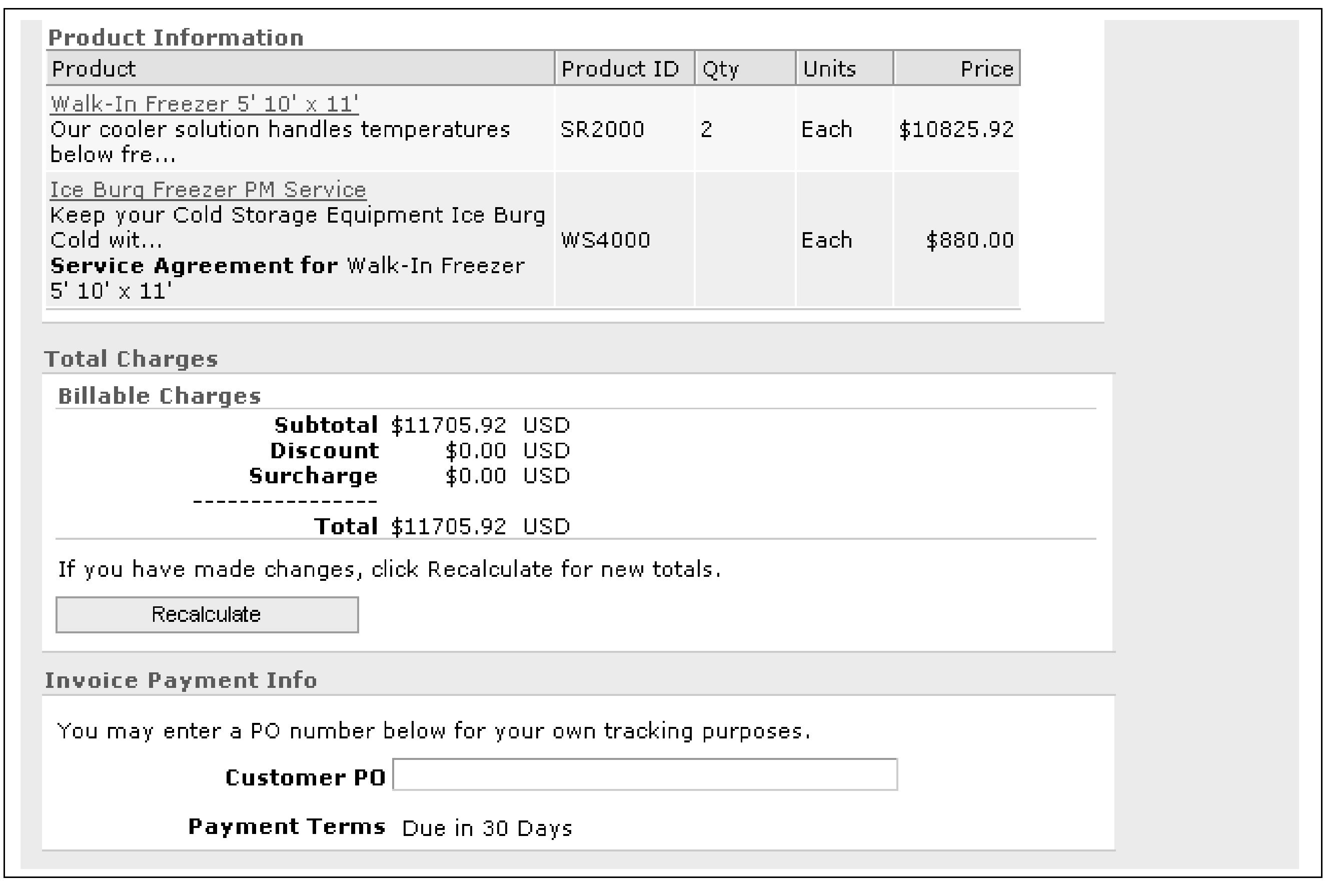
Page Name	Object Name	Navigation	Usage
Checkout	RE_SUMMARY	Shopping Cart, Click Checkout button.	Manage shipping, product, and payment information.
Multiple Shipments	RE_DESTINATION	Checkout, Multiple Shipments button	Create more than one shipment destination for the order.
Notes & Attachments Summary (notes and attachments summary)	RE_NOTE_SUMMARY	Checkout: Shipments and Payments, View Notes & Attachments link. Order/ Quote Details, Click View Notes & Attachments link.	Displays a list of notes and attachments on the order.
Attributes	RE_ATTR_RUNTIME	Checkout, Click Attributes link on a Product line.	Enter product attributes where attributes are allowed for a product.
Order/Quote Confirmation	RE_STATUS	Checkout, Click the Submit Order button or the Save as Quote button.	Displays order/quote confirmation.
Order Change	RX_PROCEED_CONFIRM	Checkout, Click on Change Order link (from a quote).	Change an order that was derived from a quote. When you change an order, all special pricing for quotes is lost, and it becomes necessary to add this confirmation page.

Managing Shipping, Product, and Payment Options From the Checkout Page

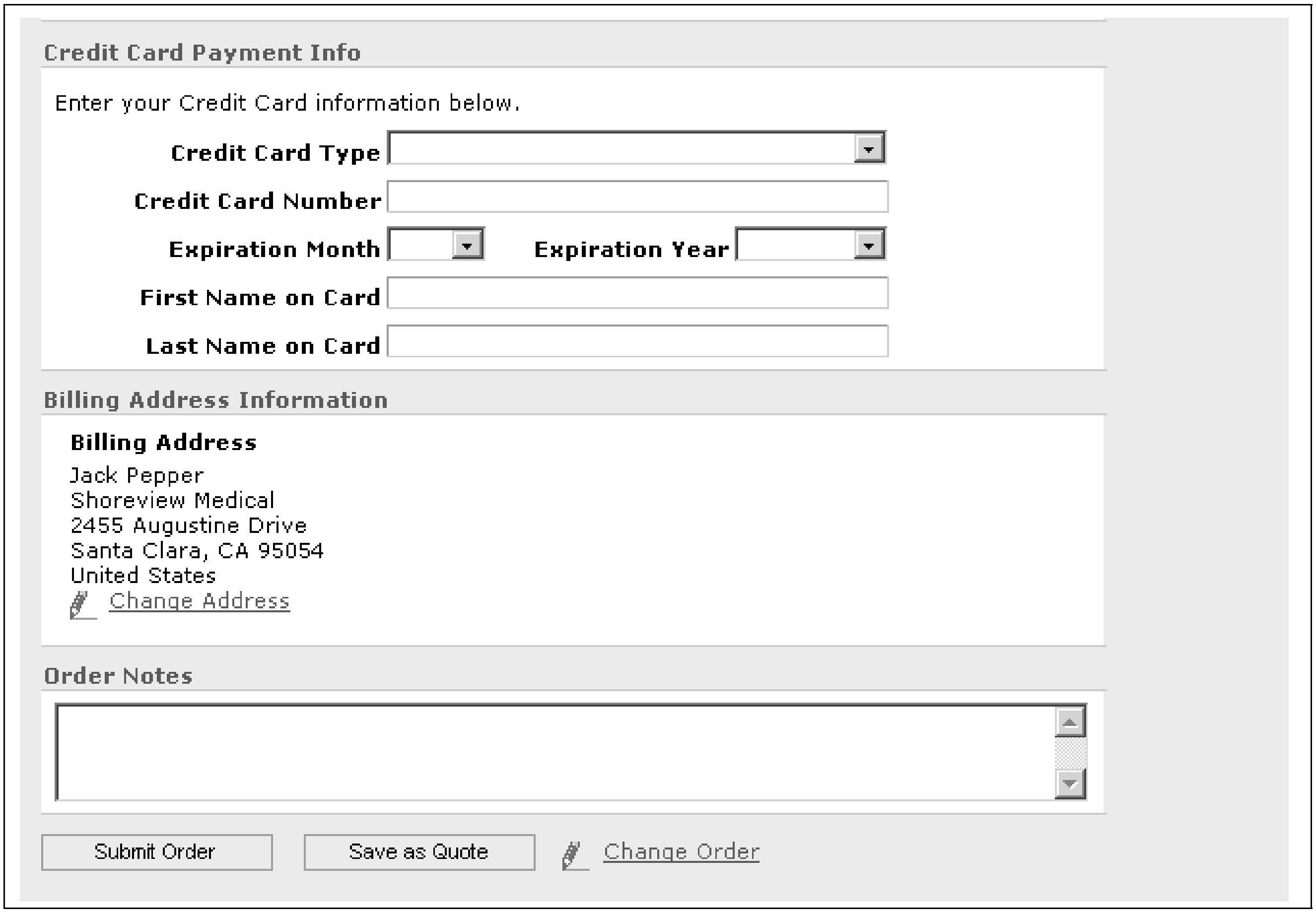
Access the Checkout page.



Checkout page (1 of 3)



Checkout page (2 of 3)



Checkout page (3 of 3)

Shipment

Multiple Shipments

Click to access the Multiple Shipments page and send the products contained in the order to different locations or by way of different shipping methods. This assumes that there is more than one product. To create multiple shipments for the same product, enter the product and appropriate quantity into the cart twice.

Product Information

Click a product link to view product details. On the Product Details page, you can change quantity or view or configure a configurable product, or view and change attributes for a product with attributes.

Invoice Payment Info (invoice payment information))and **Credit Card Payment Info (credit card payment information**

Enter a purchase order number if you are paying by invoice. Enter an account number if you are ordering a service that can be billed to a service account, such as a cable television account. Enter credit card information if payment is by credit card.

Note. The payment method that displays is based on the defined customer or consumer as well as the preferred payment method that is established on the customer's or consumer's record.

Submit Order

Click to submit the order for processing. You receive an order confirmation.

Save as Quote

Click to save as a quote. You receive a quote confirmation.

Change Order

Click to return to the shopping cart and make changes.

Shipping Options

Change Address	Change the shipping, service, or billing address.
Select Shipping Method	Choose a preferred carrier from the drop-down list.
Single Shipment	Select to prevent partial shipments of this order.
Ship as Items Available	Select to allow partial shipments.

Note. Partial shipments may increase freight charges.

Handling Multiple Shipments

Access the Multiple Shipments page.

If there are two or more order lines in the shopping cart, you can divide shipments.

To divide shipments:

1. Select the product that you want to designate for a separate shipment on the Multiple Shipments page.
2. Click the New Shipment button to request a new shipment.

Note. You cannot split a single line consisting of more than one quantity of a single item into two shipments. Also, you cannot ship components of a single package separately.

Accessing and Changing Product Attributes

Access the Attributes page.

If available for that product, access the Attributes page by clicking on the Attributes icon next to a product.

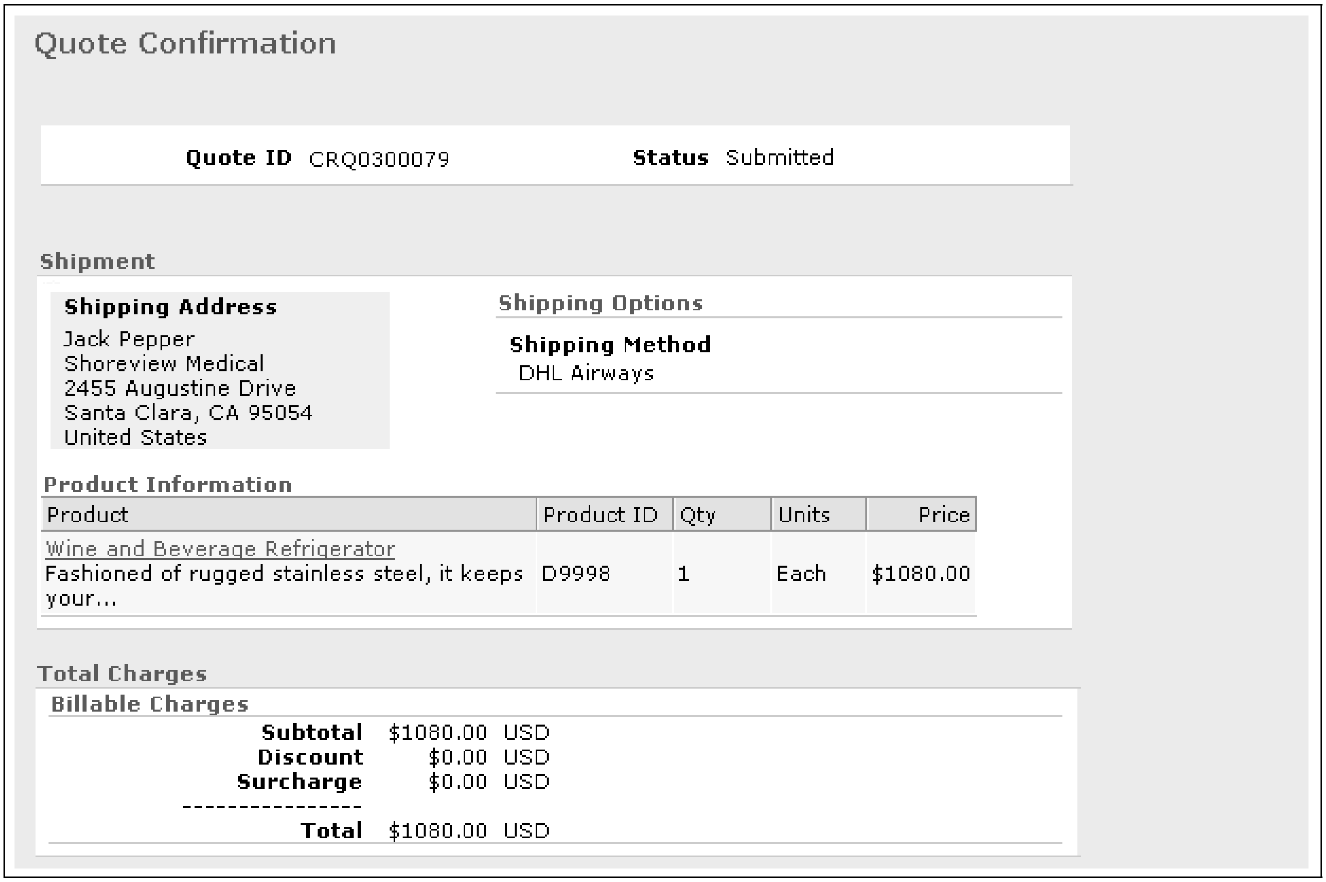
Fields on the Attributes page are dynamic. You define the attributes that are necessary for the products that you sell. Attributes are an optional feature. Attribute groups allow you to associate a different set of attributes to different sets of products.

See Also

PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook, “Setting Up Products,” Defining Product Attributes

Receiving an Order or Quote Confirmation

Access the Order or Quote Confirmation page.

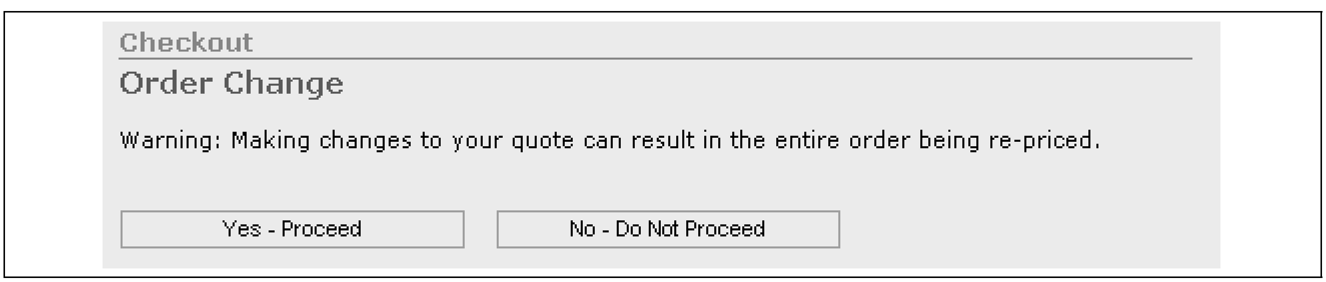


Quote Confirmation page

Product Information Click the product link to return to the Product Detail page where you can click the Order Again button to place another order or click theReturn to Order Status button to access the Order Details page again.

Changing a Submitted Order Derived from a Quote

Access the Order Change page



Order Change page

Yes - Proceed Click this button to proceed in making changes to an order that has been submitted from a quote.

Note. Making changes in an order submitted from a quote can result in the entire order being repriced.

Viewing Order or Quote Status

This section discusses how to:

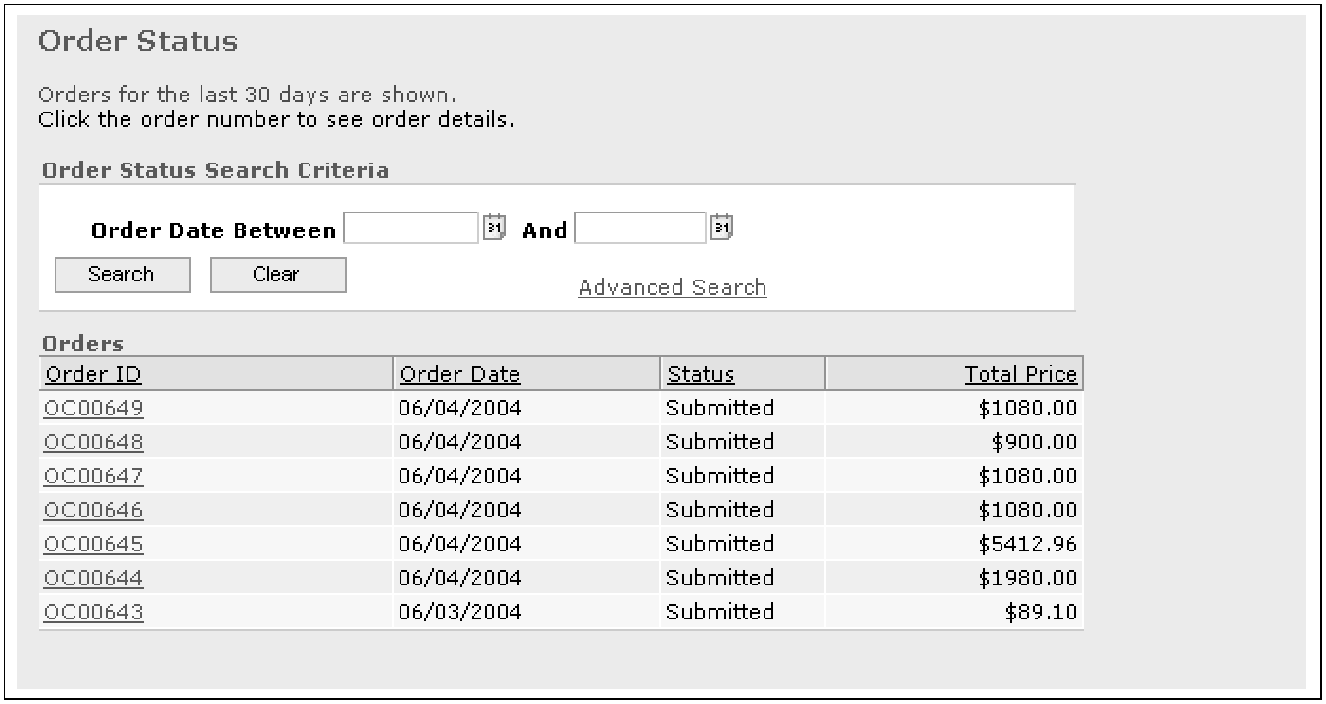
- Search for orders.
- View order details.
- Search for quotes.
- View quote details.
- Convert a quote to an order.
- Track orders.

Pages Used to View Order or Quote Status

Page Name	Object Name	Navigation	Usage
Order Status	RE_ORD_SEARCH	Order Status.	Search for orders in the system.
Order Details	RE_STATUS	Order Status, Click on an Order.	View line information for orders. You can also copy this order to the shopping cart.
Quote Status	RE_QUO_SEARCH	Quote Status.	Search for quotes in the system.
Quote Details	RE_STATUS	Quote Status, Click on a Quote.	View line information for quotes. You can also convert this quote to an order.

Searching for Orders

Access the Order Status page.



Order Status page

Note. Either the Order Status or the Quote Status page becomes available when the Advanced Search link is clicked.

Contact Us information is associated with the business unit and can be omitted or modified (during setup) as you see fit.

Search — Click to search by date.

Advanced Search — Click the Advanced Search link to search for orders by date, order ID, customer PO, and order status.

Order Status — Search for orders using advanced search by entering one of the following order status conditions:

- Cancelled
- Complete
- Expired
- Generating

Note. This status indicates that the Business Project is in the process of creating the individual orders. Only a *master* bulk order can have this status.

- Hold
- In Fulfillment

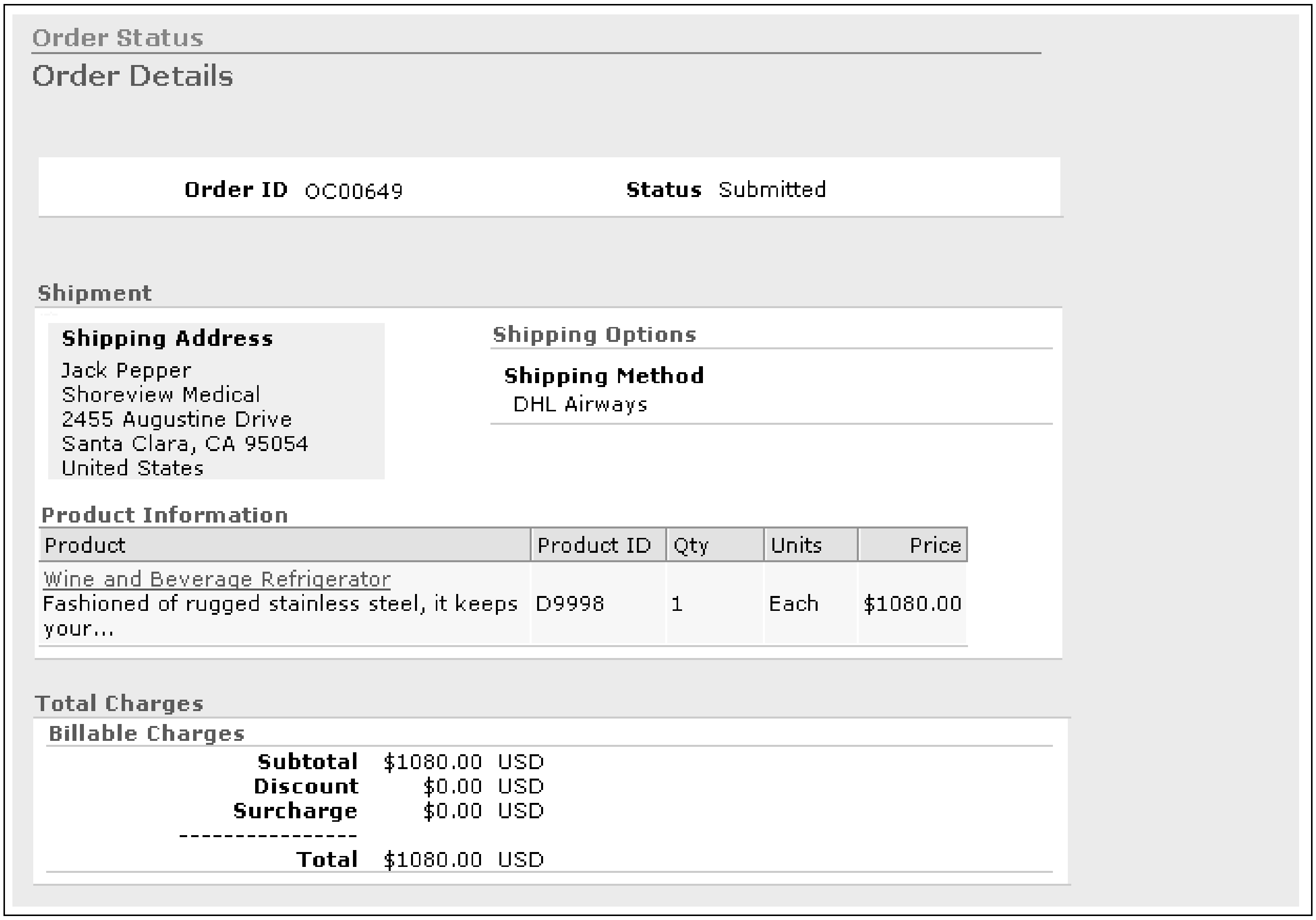
Note. This status indicates an order that is being process to be shipped or provisioned.

- New
- Partial Hold
- Submitted

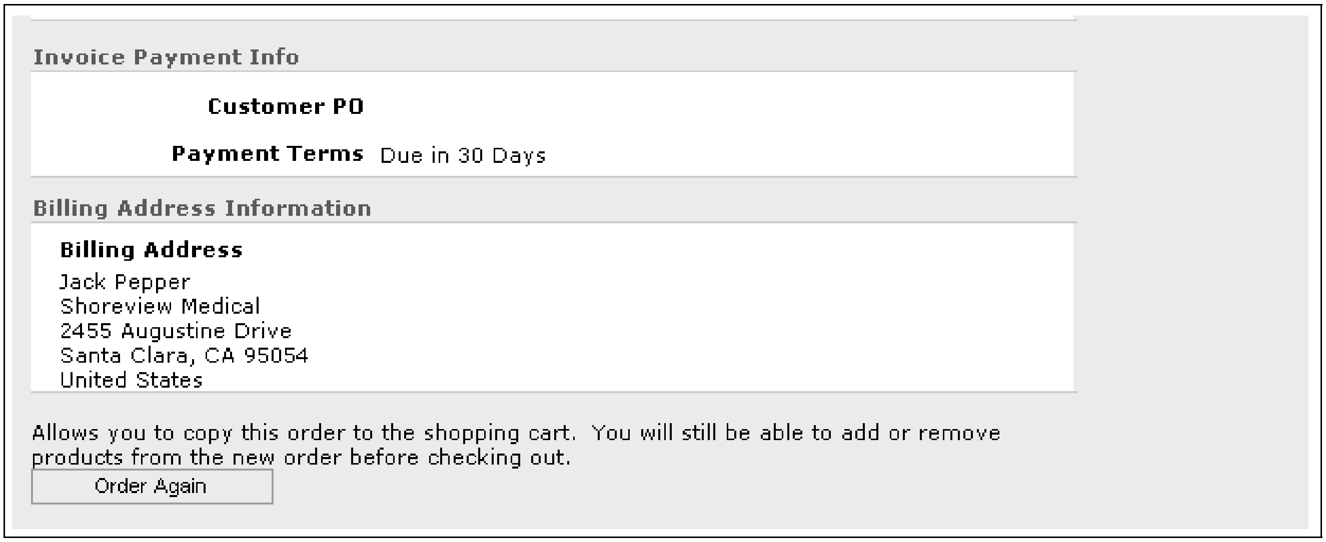
Order ID Click the order link to access the Order Details page.

Viewing Order Details

Access the Order Details page.



Order Details page (1 of 2)



Order Details page (2 of 2)

Note. To view order details for orders that originated externally, an external link must be defined on the Order Capture Setup Workbench.

Order ID Displays the PeopleSoft Order number or quote number.

Status Displays the current status of the order or quote.

Shipment Displays shipment information and links for tracking orders. When you click the Track Shipment link, you transfer to the shipment provider, where you can view the status of your packages.

Note. Information is available only for orders that have a shipment and a PRO_NUMBER defined to a web site, such as for United Parcel Service (UPS) or Federal Express (FEDEX.)

Product Click the product link to view product details.

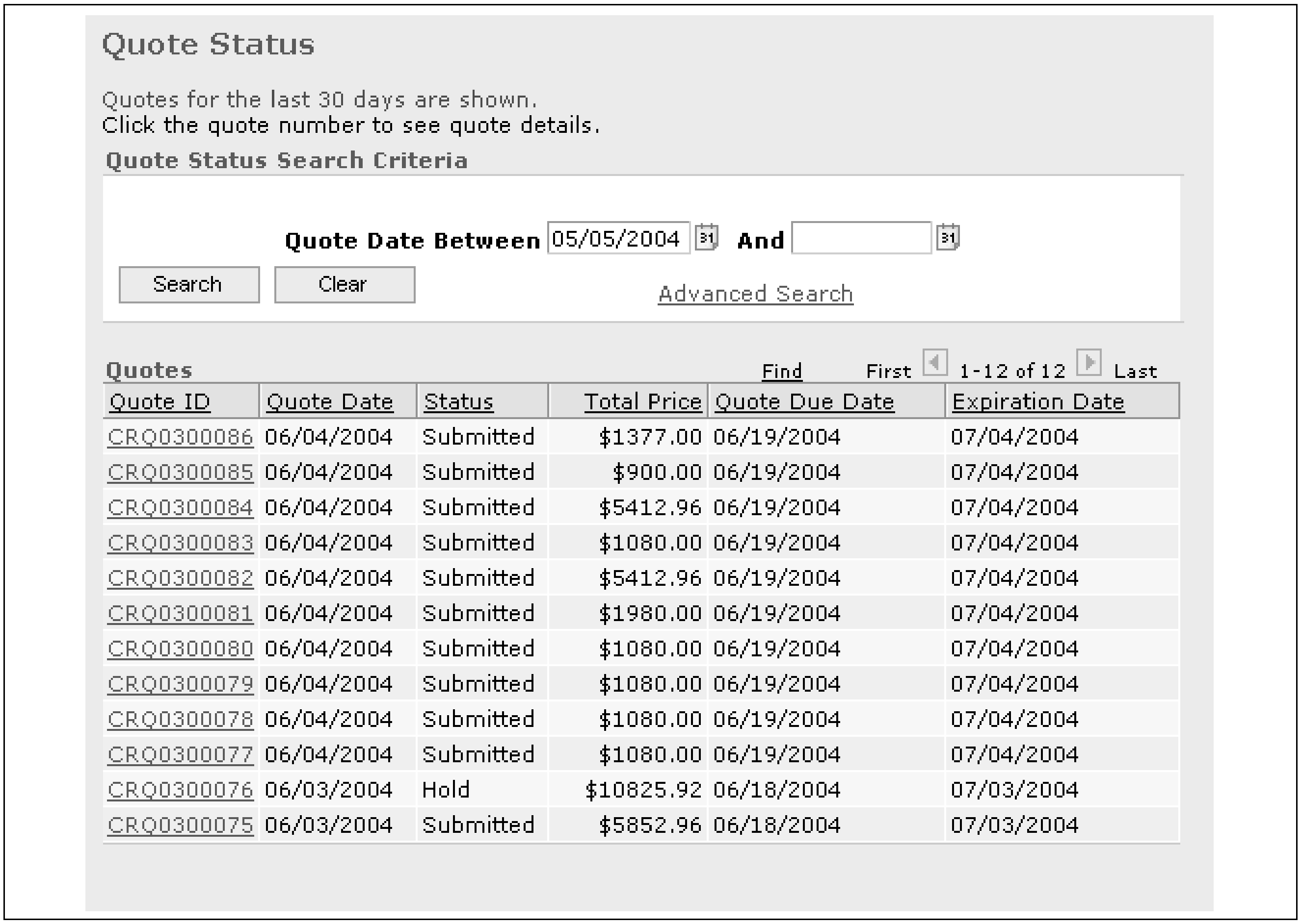
Note. Depending on the fulfillment system with which your system integrates, products or packages within packages may display their statuses individually and not as a package.

Order Again Click to copy this order to the shopping cart.

Note. Your original order does not change.

Searching for Quotes

Access the Quote Status page.



Quote Status page

Quote Due Date Displays the date on which the quote must be captured before the quote automatically expires.

Expiration Date Displays the date after which the quote is no longer valid.

Note. Advanced search criteria for *quote* status are slightly different from advanced search criteria for *order* status in that the criteria can entail quote due date and expiration date parameters.

Viewing Quote Details

Access the Quote Status page.

Click a quote ID link in the Quotes section to view Quote Details.

Converting a Quote to an Order

Access the Quote Details page.

Click the Submit as Order button on the Quote Details page to convert a quote to an order. You can add or remove products prior to conversion, but this causes the quote to lose its special pricing (if applied) and be repriced. Once you click the Submit as Order button, shipping and payment options are available on the checkout page and you can select shipping options, such as multiple shipments. You can also change the shipping destination, as well.

Tracking Orders

Access the Order Details page.

For a particular order, access the Order Details page from the Order Status page, then click the Order Tracking link that is a uniform resource locator (URL) to the third-party system. You can see the status of your packages. This link only appears when URL links for tracking are set up in advance.

Important! You can use the Order Status page to link to an order fulfillment system with the keys for that order. When you click the link, a fulfillment page appears that provides order status details. For example, a link to the PeopleSoft Order Management order status page provides real-time status from that particular fulfillment system.

PART 4

PeopleSoft Mobile Order Capture

CHAPTER 14

Understanding PeopleSoft Mobile Order Capture

This chapter provides an overview of PeopleSoft Mobile Order Capture, and explains:

- Functionality differences with PeopleSoft Order Capture.
- Synchronization options.
- Data distribution rules.

Understanding PeopleSoft Mobile Order Capture

PeopleSoft Mobile Order Capture enables sales representatives to capture customer, product, and order or quote information in a disconnected environment. When a sales user subsequently connects to the network (on which PeopleSoft Order Capture is installed), data is synchronized, and all disconnected information can be transferred between a laptop and the PeopleSoft CRM database.

For each installation of PeopleSoft Mobile Order Capture, the application supports only one sales business unit, one Order Capture business unit, one product setID, and one Customer setID. Also, an installation of PeopleSoft Mobile Order Capture on a laptop does not have to include PeopleSoft Mobile Sales. When you use both however, they must both point to the same setID for customer and product, although business units may be different.

See Also

Chapter 1, "Getting Started with PeopleSoft Enterprise CRM Order Capture Applications," PeopleSoft Order Capture Applications Business Processes, page 3

Functionality Differences with PeopleSoft Order Capture

PeopleSoft Mobile Order Capture differs from PeopleSoft Order Capture in the following ways:

- You do not browse catalogs in the same way you would browse them in the online version of this application. This does not limit functionality beyond the ability to view products from within a catalog. What this means is that you can still view products; just not in a catalog-style display.
- PeopleSoft Advisor and PeopleSoft Configurator must be launched from PeopleSoft Order Capture, not PeopleSoft Mobile Order Capture. You can add order or quote lines for configured products, but the actual product configuration itself must be performed in PeopleSoft Order Capture.
- Dynamic packages are not supported. Order or quote lines for dynamic packages (also called, ?lightly configured packages?) can be added, but they must be configured within PeopleSoft Order Capture.

- PeopleSoft Mobile Order Capture allows you to view list price information when you add a product to an order, but any pricing that is applied to the order according to pricing rules are applied during the synchronization process. For practical purposes, this means that once synchronization has occurred, prices will be the true prices, including all discounts, surcharges, taxes, VAT and freight charges.
- You can only specify one Ship To location per order. In PeopleSoft Order Capture, you can ship different products to different locations.
- Tax and Freight calculations occur on the server when you synchronize the order. These charges are not calculated in a disconnected environment.
- There is no upsell or cross-sell of products within the order, although you can view these from Product Details.

Syncrhonization Options

You'll perform synchronization with your mobile device connected and logged in to your company network server. You can be connected directly to your local area network, through dial-up, or through the internet.

After device initialization (bootstrap synchronization), you have the following synchronization options, which are available to all PeopleSoft CRM mobile applications:

Note. These options are fully explained in the general documentation that accompanies this enhancement.

- *Upload Changes*

  This allows you to send your updates to the server. Only error responses are received from the server.

  Note. Full Synchronization is required to receive all server-side changes.

- *Full Synchronization*

  This option provides a complete refresh of any business data that has been changed, either on the main server or the mobile device. This guarantees that both systems are synchronized.

  Note. Updates are transferred to the server and error responses are received from the server. New or modified business data is received from the server.

- *Update Applications*

  This option provides a complete refresh of all application and business data. All application definitions are refreshed from the server and business data is updated.

- *Last Results*

  This option displays your most recent synchronization results.

See Also

PeopleSoft 8.8 CRM Mobile Applications PeopleBook

Data Distribution Rules

Mobile devices may have limited processing power, storage capacity, and display space. You can limit the range and quantity of data passed to the mobile device by specifying a data distribution method. Data distribution is unique to mobile devices. These rules are essentially tools that control the amount, type, or both, of data that is downloaded to the mobile application. These rules can limit the data to customers from a particular region, or orders within a particular time frame, for example.

Data distribution for mobile applications:

- Implements security.
- Filters the data downloaded to the mobile device.

See Also

PeopleSoft 8.8 CRM Mobile Applications PeopleBook

CHAPTER 15

Setting Up PeopleSoft Mobile Order Capture

This chapter provides an overview of mobile setup tasks, and explains how to:

- Perform an initial, bootstrap synchronization.
- Define PeopleSoft Mobile Order Capture options.

Understanding Mobile Setup

Before you can initialize and begin using your PeopleSoft CRM Mobile application, PeopleSoft Mobile Agent must be installed on your mobile device. This installation is described in the *PeopleTools Mobile Agent PeopleBook* referenced previously.

Mobile device initialization is the process by which application metadata and business data are installed to the mobile device for the first time. Although PeopleSoft Mobile Agent may be installed to the device by an Administrator, only the user of the PeopleSoft Mobile Agent (defined by user ID and user Role) can synchronize application metadata and business instance data from the server to the device.

Note. Take advantage of all PeopleSoft sources of information, including the installation guides, table-loading sequences, data models, and business process maps. A complete list of these resources appears in the preface in the PeopleSoft CRM Application Fundamentals PeopleBook, with information about where to find the most current version of each.

Performing an Initial Bootstrap Synchronization

Initializing a mobile device requires a bootstrap synchronization. The steps required for a bootstrap synchronization are as follows

1. Install the PeopleSoft Mobile Agent software to the device.
2. Perform a bootstrap synchronization.
    a. Verify that the PSMOBILE.INI file in your WINNT folder, identifies the server you will use to transfer PeopleSoft Mobile Order Capture data between the server and the remote device when you launch the application. This URL should be identified in the SyncGateway parameter. (For example, SyncGateway=http://psuser110200/SyncServer).

    b. Launch the PeopleSoft Mobile Agent by selecting Start, Programs, PeopleSoft Mobile Agent, Start PeopleSoft Mobile Agent. If PeopleSoft Mobile Agent is already running on the local machine, you can stop the application, by selecting Start, Programs, PeopleSoft Mobile Agent, Stop PS Mobile Agent.

c. From the Start menu of your computer, select Start, Programs, PeopleSoft Mobile Agent, PS Mobile Application. If the device has not previously been initialized, the PeopleSoft Mobile Device Bootstrap page appears.

d. Sign in to the application with your User ID and Password.

The userID, such as the delivered userID/password,*MOCREP/MOCREP*, identifies the appropriate application metadata (application definitions) and instance data (business data) to be downloaded to the device. When the sign on information has been entered, the synchronization begins, and the user must wait for this process to complete before launching the application. Subsequent synchronizations do not require a complete synchronization of both metadata and instance data, but only upload changes from the device to the server and reconcile changes between the device and server.

e. Click *Synchronize.*

The PeopleSoft Mobile Synchronization Results page appears, showing the progress of your bootstrap synchronization.

When complete, check for alerts or notifications.

Both the PeopleSoft Mobile Agent and the PeopleSoft Mobile Order Capture application should now be running. You are now ready to use your PeopleSoft Mobile Order Capture application.

Note. If you make changes to the Capture Type Workbench, or the Setup Workbench in PeopleSoft Order Capture, those changes may not be reflected in PeopleSoft Mobile Order Capture. For example, if you add new order status values they will not appear in PeopleSoft Order Capture. However, any changes in the Integration Workbench or the Order Capture Business Unit component will be reflected in PeopleSoft Mobile Order Capture, if applicable.

See Also

PeopleTools PeopleBook: PeopleTools Mobile Agent

Defining PeopleSoft Mobile Order Capture Options

In this section, we explain how to:

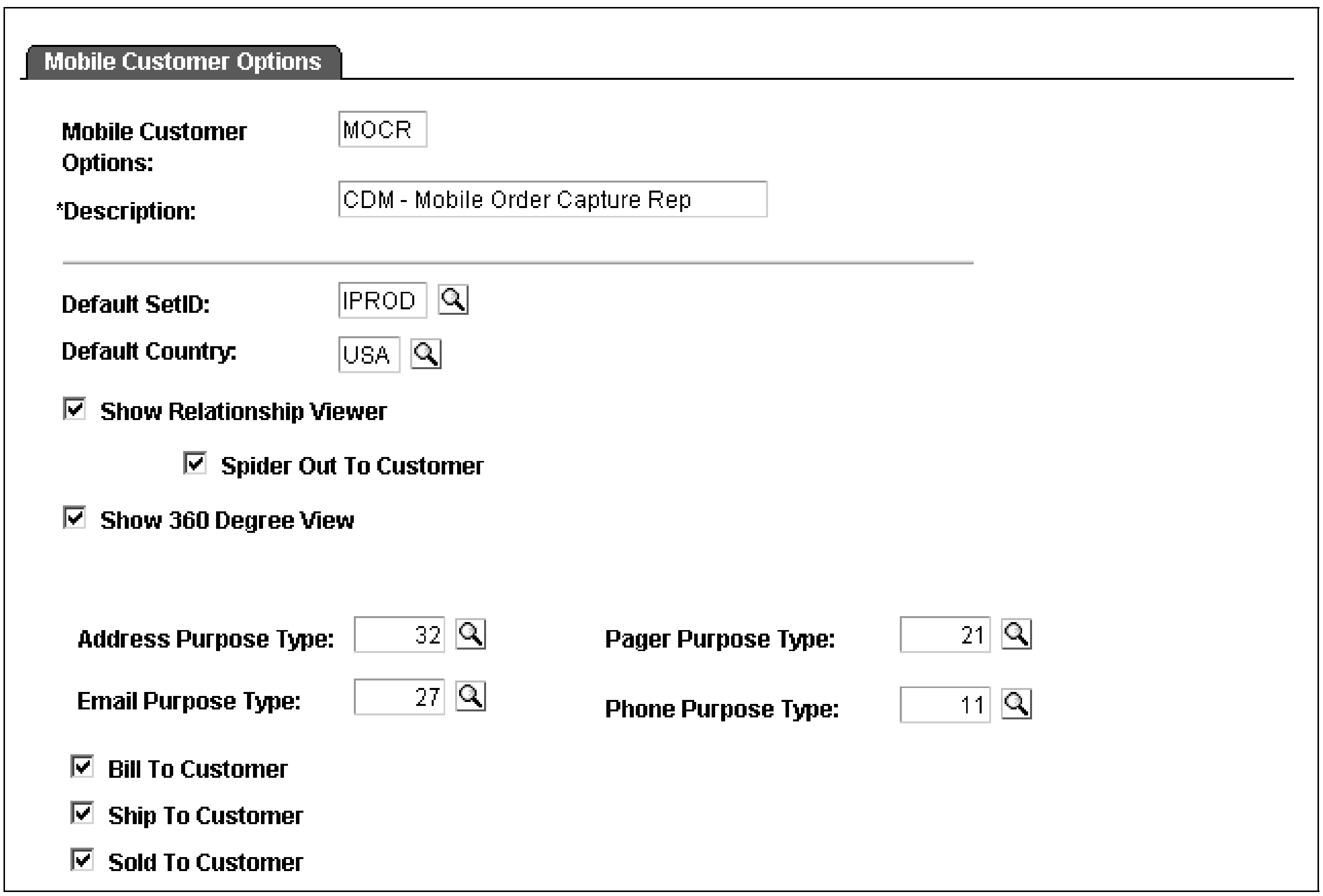
- Define customer options.
- Define product defaults.
- Define Mobile Order Capture defaults.

Pages Used to Define PeopleSoft Mobile Order Capture Options

Page Name	Object Name	Navigation	Usage
Mobile Customer Options	RDM_MOBILE_DFLT	Set Up CRM, Install, Mobile, Mobile Customer Options, Mobile Customer Options	Define the data distribution methods to display the Relationship Viewer and the 360 Degree View on mobile devices.
Mobile Product Defaults	MOC_OPTIONS_PG	Set Up CRM, Install, Mobile, Mobile Product Options, Mobile Product Defaults	Determine how attachments and images are synchronized from the product data model in the CRM database to the mobile device.
Mobile Order Capture Defaults	MOC_OC_OPTIONS_PG	Set Up CRM, Install, Mobile, Mobile Order Capture Options, Mobile Order Capture Defaults	Determine how attachments and images can be placed on the order itself.

Defining Customer Options

Access the Mobile Customer Options page.



Mobile Customer Options page (1 of 2

Customize | Find | First 1-3 of

*Role Type ID	Role	Business Object Name Type	Relationship View Name	Spider Out To Relationships	360 View Tree Name	Three Sixty View Tab Number
2	Company	PREFERRED	CONTACT VIEW	☑	MOBILETREE	6
8	Contact	PREFERRED	FSI CONTACT	☑	MOBILETREE	5
9	Individual Consumer	PREFERRED	CONSUMER CONTACTS	☑	MOBILETREE	6

Mobile Customer Options page (2 of 2)

Default SetID The ID for this set of options.

Show Relationship Viewer Select this check box to display the Relationship Viewer on mobile devices. This field will not be enabled if the corresponding option in the Business Object Model System Options is not checked.

Spider Out to Customer During a synchronization, this option controls whether the synchronization process spiders out to retrieve the full object, that is, Company, Contact, and so forth, or if only the Name is retrieved.

Note. If you check this box, there may be a slight decrease in system performance.

Show 360 Degree View Select this check box to display the 360 Degree View on mobile devices. This field will not be enabled if the corresponding option in the Business Object Model System Options is not checked.

Spider Out for 360 View During a synchronization, as transactions are encountered this option will control whether the synchronization process will spider out to those transactions. If this option is checked, the synchronization process will spider out to send all relevant information to the Mobile Device.

Address Purpose Type These are the defaults for the address contact methods that are created on the device. Delivered values are: *Physical Location*, *Business*, *Campus*, *Dormitory*, *Home*, *Legal*, *Mailing*, and *Other*.

Email Purpose Type These are the defaults for the email contact method. Delivered values are: *Business*, *Campus*, *Dorm*, *Home* and *Other*.

Pager Purpose Type These are the defaults for the pager contact method. Delivered values are: *Pager 1* and *Pager 2*.

Phone Purpose Type These are the defaults for the phone contact method. Delivered values are: *Business*, *Cell*, *Default*, *FAX*, *Home*, *Telex*, *Campus*, *Dormitory*, *main* and *Other*.

Bill To Customer Select this check box if you want customers created on the mobile device to be Bill To customers. Addresses created for a Bill To customer will automatically be marked as a Bill To Address and the primary address will automatically be marked as a Primary Bill To Address. Bill To Customer means that invoices can be sent to the customer or site.

Ship To Customer Select this check box if you want customers created on the mobile device to be Ship To customers. It should be noted that addresses created for such a Ship To customer will automatically be marked as a Ship To Address and the

	primary address will automatically be marked as a Primary Ship To Address. Ship To Customer means that invoices can be shipped to the customer or site.
Sold To Customer	Select this check box if you want customers created on the mobile device to be Sold To customers. It should be noted that addresses created for such a Sold To customer will automatically be marked as a Sold To Address and the primary address will automatically be marked as a Primary Sold To Address. Sold To Customer means that invoices can be sold to the customer or site.
Role Type ID	Displays the identification code associated with the business object role type. When adding a new role type, the system automatically assigns a value using automatic numbering functionality.
Role	Displays the role for which you want to view relationships.
Business Object Name Type	Displays the business object name type for which this role type is valid.
Relationship View Name	Select the relationship view that you want to associate with the role.
Spider Out to Relationships	During a synchronization, as transactions are encountered this option will control whether the sync process will spider out to the relationships.

Warning! It is a requirement for PeopleSoft Mobile Order Capture that you select the check box for Company, Contact, and Individual Consumer.

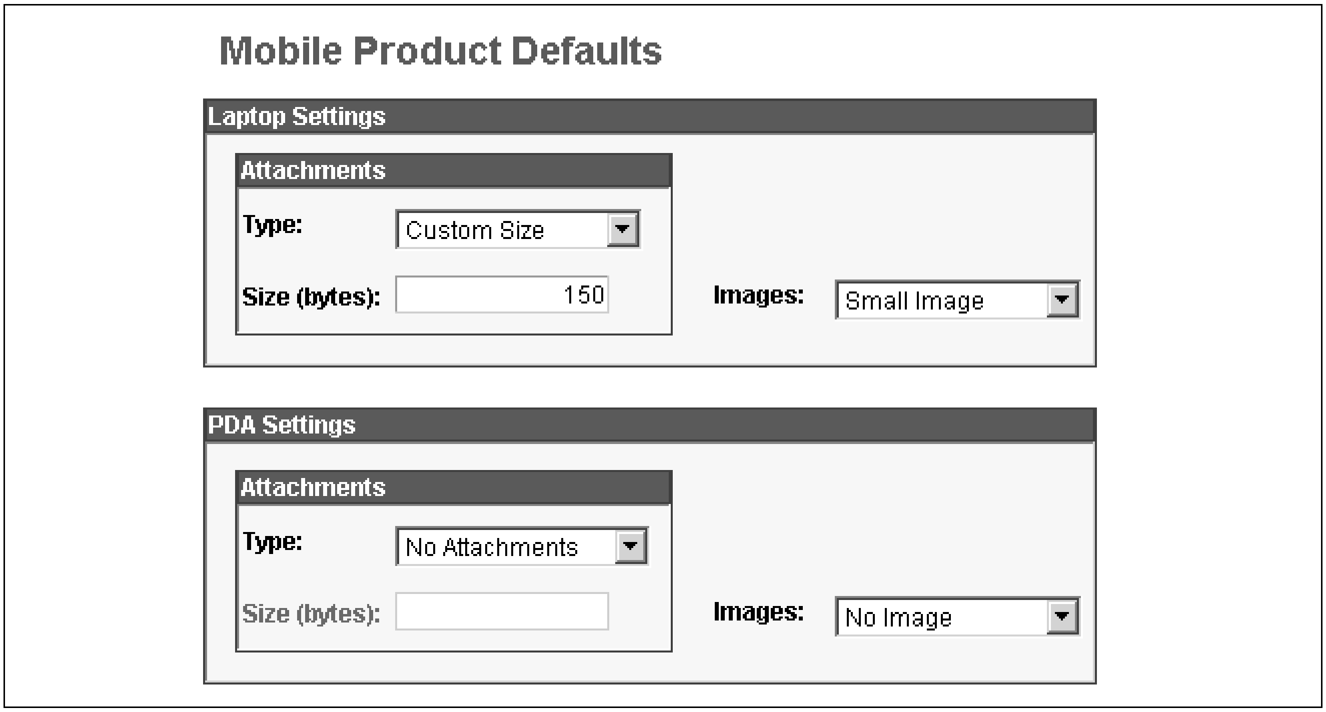
360 Degree Tree Name	The tree displays all activities and interactions for the company or contact. Plus, it can display an add and search node for the particular activity of the tree. Click the detail link to drill down to the detail pages for the activity. Click the add link to access a page where you can add the activity. Click the search link to access a page where you can search for the activity.
360 Degree Tab Number	Displays the tab number of the 360 Degree View.

See Also

PeopleSoft Enterprise CRM 8.9 Mobile Applications PeopleBook, “Getting Started with PeopleSoft Enterprise CRM Mobile Applications,” PeopleSoft Enterprise CRM Mobile Applications Implementation

Defining Product Defaults

Access the Mobile Product Defaults page.



Mobile Product Defaults page

Laptop Settings

Type

Select the synchronization option for product attachments to be passed down from the database to the laptop computer. Valid values are: *All Attachments, Custom Size* and *No Attachments*. When you select *Custom Size*, the system enables you to limit which attachments are synchronized by attachment size.

Size (bytes)

When *Custom Size* is selected for Type, specify the maximum size in bytes of the attachments that you want to pass down form the database to the laptop computer. The system will only deliver product attachments that are less than the specified size.

Images

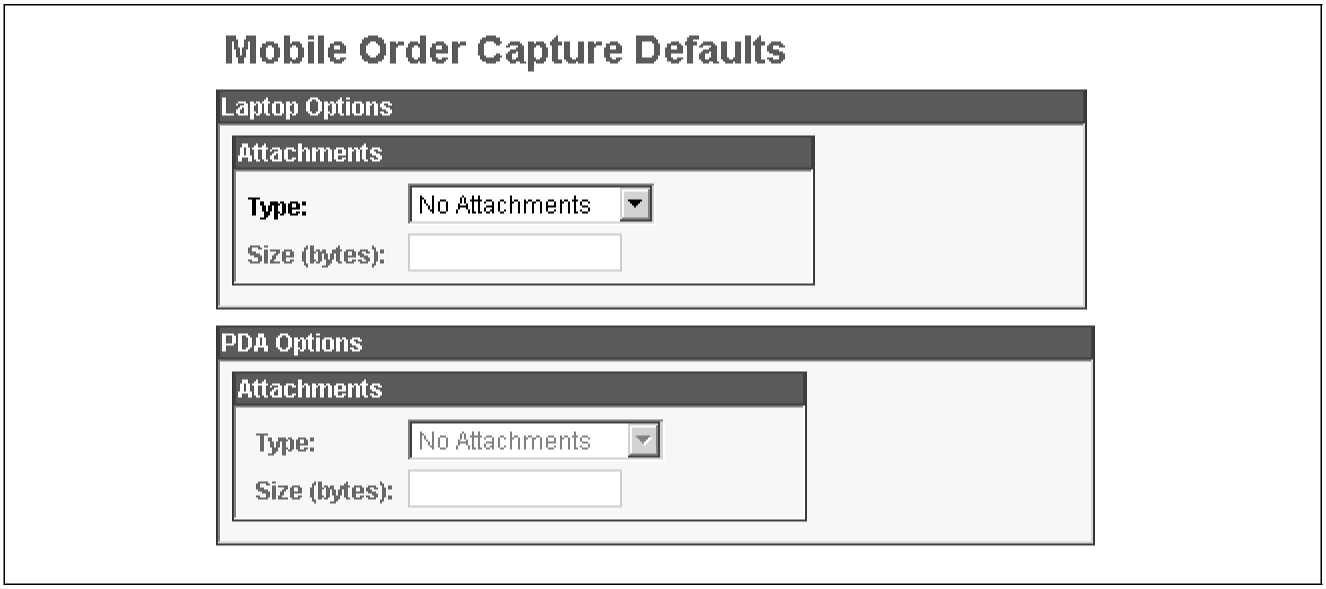
Select the product image that you want to pass down from the database to the laptop computer. Valid values are: *Large Image, Medium Image, No Image, Small Image,* and *Zoom Image*. The default is *Medium Image*.

PDA Settings

The PDA options are available for products, as sales uses them on PDA.

Defining Mobile Order Capture Defaults

Access the Mobile Order Capture Defaults page.



Mobile Order Capture Defaults page

Laptop Settings

Type

Select the synchronization option for order and quote attachments to be passed down from the database to the laptop computer. Valid values are: *All Attachments, Custom Size* and *No Attachments*. When you select *Custom Size,* the system enables you to limit which attachments are synchronized by attachment size.

Size (bytes)

When *Custom Size* is selected for Type, specify the maximum size in bytes of the attachments that you want to pass down form the database to the laptop computer. The system will only deliver order and quote attachments that are less than the specified size.

PDA Options

By default, PDA settings are currently unavailable for selection in PeopleSoft Mobile Order Capture.

CHAPTER 16

Using PeopleSoft Mobile Order Capture

This chapter provides an overview of PeopleSoft Mobile Order Capture options, and explains how to:

- Work with customers on the mobile device.
- Work with products on the mobile device.
- Work with orders and quotes on the mobile device.

Understanding PeopleSoft Mobile Order Capture Options

PeopleSoft CRM Mobile Order Capture enables you to view customer and product information on mobile devices for *one* predefined setID. Although business units used by PeopleSoft Mobile Order Capture and PeopleSoft Mobile Sales can be different, their business units must be related to the same setID for customers and products.

The setID for customers and products can be different

Working with Customers on the Mobile Device

Consumers and sites are not supported in PeopleSoft Mobile Order Capture. Neither can you create a new customer on your laptop and use them on an order. Customers need to have any or all of the Sold To, Bill To, and Ship To options setup by a CSR in PeopleSoft CRM before they can be used in PeopleSoft Mobile Order Capture.

See Also

PeopleSoft Enterprise CRM 8.9 Mobile Applications PeopleBook, “Working with Customer and Product Information on a Mobile Device,” Working with Companies, Consumers, Contacts, Workers and Sites

Working with Products on the Mobile Device

This section provides an overview of product data in PeopleSoft Mobile Order Capture, and explains how to view product information.

Understanding Product Data in PeopleSoft Mobile Order Capture

PeopleSoft Mobile Order Capture stores product information as follows:

- Product information is extensive, but is for information purposes only, and cannot be modified.
- Product images are optional. Product options allow you to specify whether or not to download product images, and if so, which image size to download.
- Attachments are optional, and can be controlled by file size. You control attachment size by defining the maximum file size (in bytes) that will be downloaded.
- Product information includes list price, unit of measure (UOM) and currency.

Pages Used to View Product Information

Page Name	Object Name	Navigation	Usage
Product Definition-Details	MOC_PROD_DET	Products CRM, Product Definition Select a Product and click the Details button	View product information, such as Description and List Price.
Product Definition-Notes	MOC_PROD_DET	Products CRM, Product Definition, Select a Product, Details Click the Notes tab	View note information for a specific product.
Product Definition-Attachments	MOC_PROD_DET	Products CRM, Product Definition, Select a Product, Details Click the Attachments tab	View attachment information for a specific product.
Product Definition-Product Groups	MOC_PROD_DET	Products CRM, Product Definition, Select a Product, Details Click the Product Groups tab.	View product group information for a specific product.
Product Definition-Relationships	MOC_PROD_DET	Products CRM, Product Definition, Select a Product, Details Click the Relationships tab.	View upsell and cross-sell information for a specific product.
Relationship Details	MOC_PROD_DET	Products CRM, Product Definition, Select a Product, Details Click the Relationships tab, Click the Related Product button.	View detailed upsell and cross-sell relationships for a specific product.

Viewing Products in PeopleSoft Mobile Order Capture

Access product definition pages, such as the Details page or Relationships page.

Details | Notes | Attachments | Product Groups | Relationships

Product ID: SR2010

Description: Walk-In Freezer 7ft 9in x11ft

Status: Active

Category: WALK-INS

Currency	List Price	UOM
US Dollar	$6606.00	Each

Product Definition - Details page

Details | Notes | Attachments | Product Groups | Relationships

Product ID: SR2010

Find | View All |

Related Product	Description	Relationship
10019	Freezer, Shelves	Cross-Sells
10020	Freezer Thermostat	Cross-Sells
10021	Freezer, Light Bulb	Cross-Sells
10022	Freezer, Compressor	Cross-Sells
SR2900	Custom Build Freezer Package	Up-Sells

Product Definition - Relationships page

When you drill on the icon next to the Related Product, you'll view the Relationship Details page:

Relationships

Product ID: SR2010

Related Product ID	Related Product Description	Product Relationship
10019	Freezer, Shelves	Cross-Sells

Relationship Details page

Note. Although, product relationships can be viewed from the product pages, as seen above, Upsell and Cross Sell icons will not appear on the order line, as they do in online entry.

Working with Orders and Quotes on the Mobile Device

In this section, we explain how to:

- Create new orders or quotes.
- View existing orders or quotes.

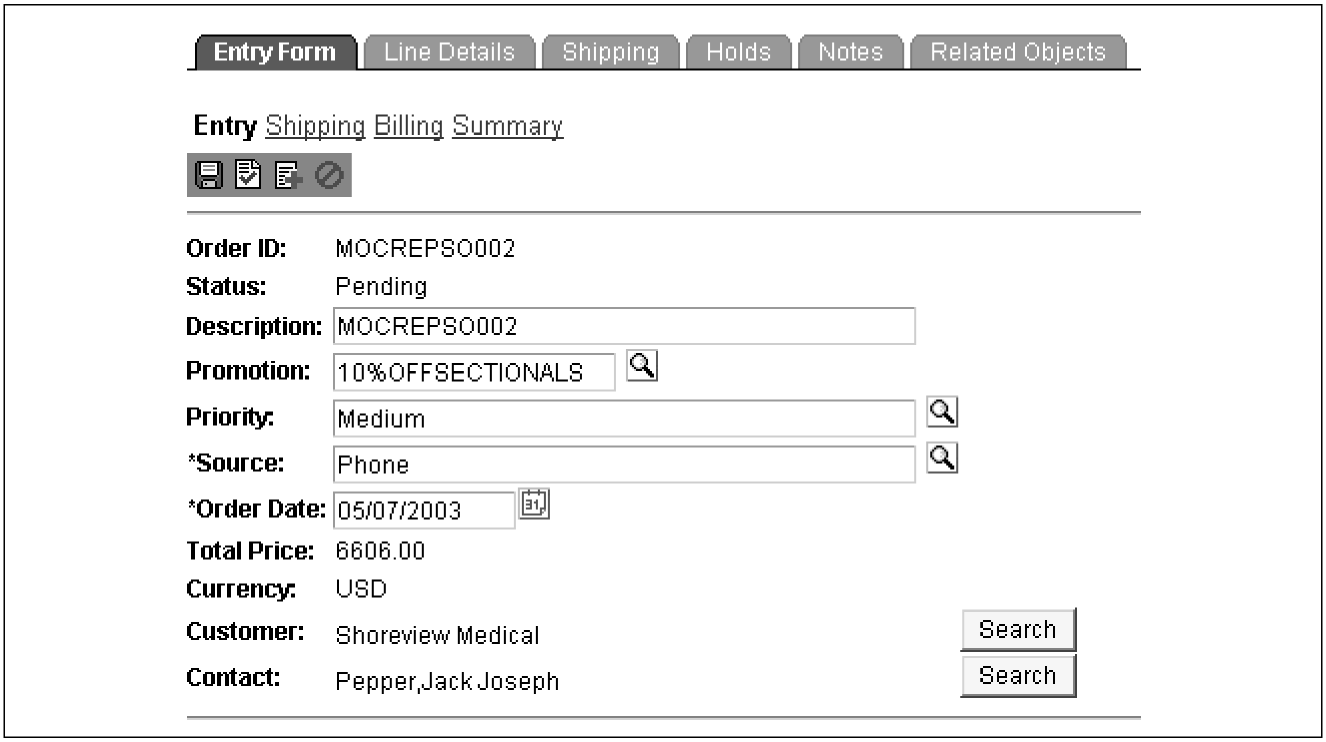
Pages Used to View or Create Orders or Quotes

Page Name	Object Name	Navigation	Usage
Create Order/Quote	MOC_DUMMY_PG	Orders and Quotes, Create Order/Quote. Click the Create Order button.	Use the Create Order/Quote page to create new orders or quotes.
Entry Form	MOC_FORM	Orders and Quotes, Create Order/Quote. Click the Create Order button, Entry Form.	Use the Entry Form page to begin creating a new order or quote, or view an existing order or quote.
Line Details (Summary)	MOC_FORM	Orders and Quotes, Create Order/Quote. Click the Create Order button, Entry Form, Line Details	View all order lines for this order, or add order lines to the order.
Line Details	MOC_FORM	Orders and Quotes, Create Order/Quote. Click the Create Order button, Entry Form, Line Details, Click the details icon for an existing line to view details, or click the *Add* button to add a new line to the order.	View all a single line's details to make edits to the line details, or to add to the order.
Shipping (Summary)	MOC_FORM	Orders and Quotes, Create Order/Quote. Click the Create Order button, Entry Form, and click the Shipping tab or select the Shipping link.	View a summary of Ship To information, such as *Customer, Contact*, and *Requested Date of Shipment.*
Shipments (Details)	MOC_FORM	Orders and Quotes, Create Order/Quote. Click the Create Order button, Entry Form, and click the Shipping tab or select the Shipping link and click the details button next to the Customer.	Change or view detailed shipping information.

Page Name	Object Name	Navigation	Usage
Billing	MOC_FORM	Orders and Quotes, Create Order/Quote. Click the Create Order button, Entry Form, and select the Billing link.	Change or view billing information related to the order.
Summary	MOC_FORM	Orders and Quotes, Create Order/Quote. Click the Create Order button, Entry Form, and select the Summary link.	View a complete summary of the order or quote.
Holds	MOC_FORM	Orders and Quotes, Create Order/Quote. Click the Create Order button, Entry Form, and click the Holds tab.	View holds on the order.
Notes	MOC_FORM	Orders and Quotes, Create Order/Quote. Click the Create Order button, Entry Form, and click the Notes tab.	Add or view a note or attachment.
Related Objects	MOC_FORM	Orders and Quotes, Create Order/Quote. Click the Create Order button, Entry Form, and click the Related Objects tab.	View related actions.

Creating New Orders or Quotes

Use the Entry Form page to create a new order or quote. Access the Entry Form page.



Entry Form page

Note. The toolbar buttons displayed within PeopleSoft Mobile Order Capture are standard PeopleSoft Order Capture icons, and are explained in the Common Elements section of the Managing Orders and Quotes chapter of the *PeopleSoft 8.8 CRM Collaborative Selling PeopleBook.* Here the icons represent, *Save Order, Submit Order, Add Order Line,* and *Cancel Order,* respectively. Personalization of the toolbar icons is not supported in PeopleSoft Mobile Order Capture.

Order ID

The order ID initially defaults to <user id><capture type><sequence number>. For example, if your user ID is “MOCREP” and you are entering your first order, the order ID will be set to “MOCREPSO001.” If you enter your second quote, the quote ID will be “MOCREPQUO002.”

Note. The order ID will be overwritten by the server upon synchronization. For example, if you have created a mobile order with the ID of “MOCREPSO001,” it will change to a number. The format is determined by the Capture Type workbench when you next synchronize.

Status

Select from six possible delivered statuses: *Open, Pending, In Process, Hold, Complete,* or *Canceled.*

Description

Enter descriptive information here. The Order ID is the default entry.

Promotion

Select a Promotion for the line.

Priority

Enter a capture priority of *Urgent, High, Medium,* or *Low* to specify the default priority for all orders that are created in the business unit.

Source

Enter an informational code that identifies the source of the order. For example, you could specify *Phone* if you received this order by telephone.

Note. This is a required field so you must choose a value.

Order Date Select the date of order entry. By default, today's date will be entered here.

Total Price Displays Total price of the order appears here.

Currency Currency code is selected on the Create Order/Quote page, and displays here.

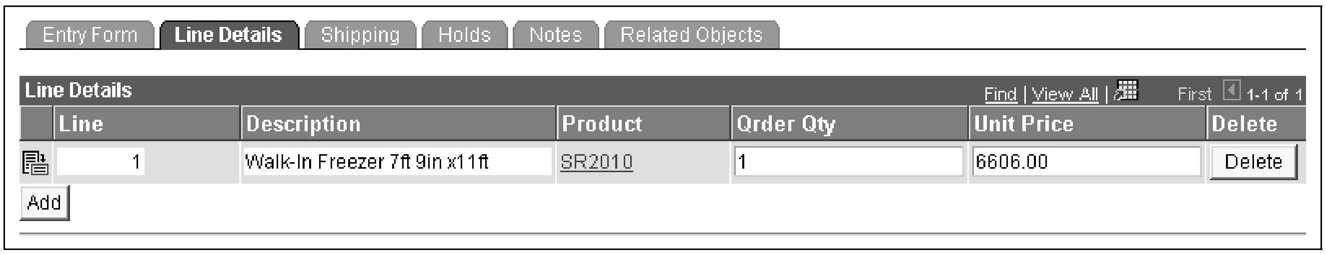
Customer Select the Sold To customer for this order.

Contact Select the contact person for this customer. The Sold To contact will be automatically populated after selecting a Sold To customer.

See *PeopleSoft 8.8 CRM Collaborative Selling PeopleBook*

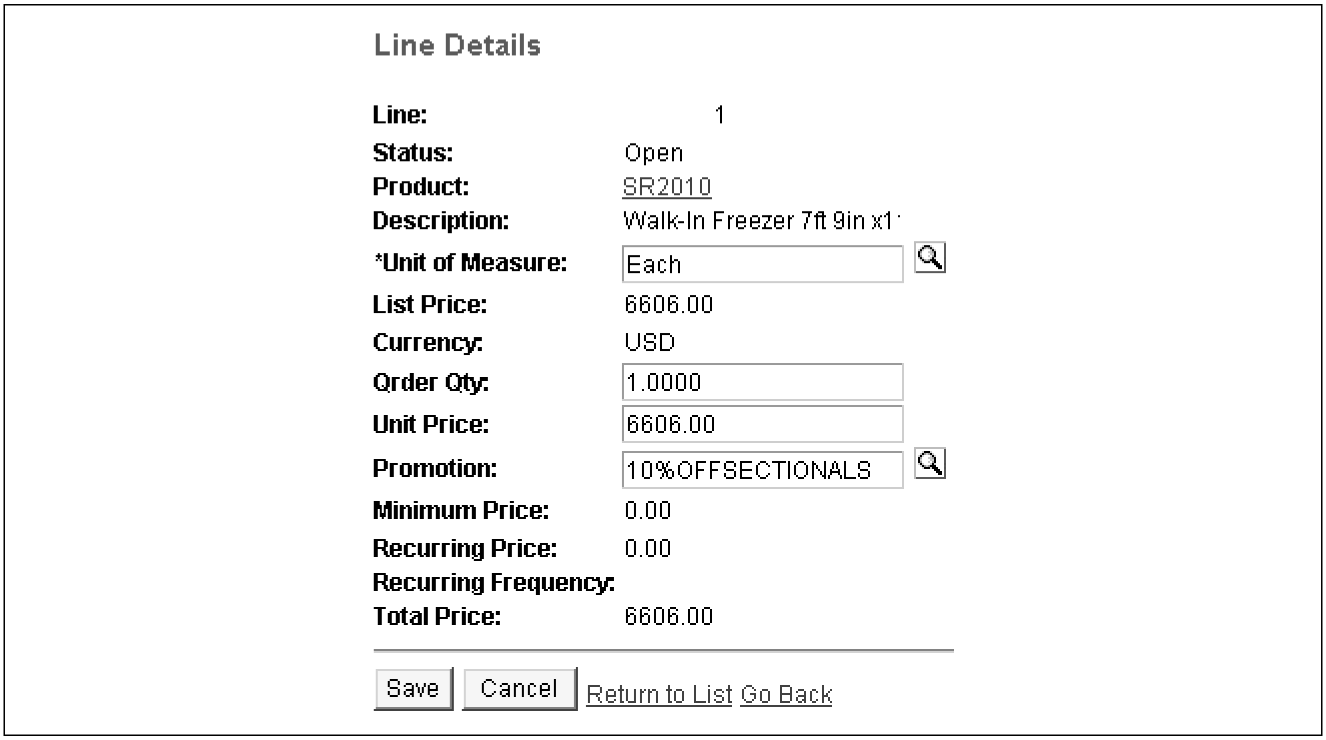
Adding Products to the Order

Access the Line Details page.



Line Details (summary) page

Line Details displays a summary of products (or order lines) connected to this order. Click the details icon next to the line number to drill into product detail information for a specific order line. Click the *Add* button to add another product to the order. When you click the *Add* button, and choose a product, the following Line Details page appears:



Line Details page

The Line Details page indicates the list price and total price for the line. If the order has been synchronized, the price is the final price that includes all surcharges or discounts set up in pricing. Any special pricing is applied when synchronizing the order with the server.

Unit of Measure

Select the unit of measure for this product.

List Price

List price displays from the product definition, and is the price before the application of any price adjustments, such as discounts or surcharges.

Order Qty

Enter the quantity of product for this order line.

Unit Price

Unit price is the price of the product after pricing adjustments are applied (by the pricing engine).

Note. For PeopleSoft Mobile Order Capture, pricing adjustments are only applied once the order has been synchronized with the main application.

Promotion

Select a promotion code from the lookup.

Minimum Price

Minimum price is determined by product setup. If you enter a unit price that is below the minimum price on the line, and then attempt to submit the order, a hold is generated at synchronization, and the order cannot continue without a manual override.

Recurring Price

If this product has a recurring price, that recurring price amount appears here. You combine the recurring price with recurring frequency to arrive at a price. This could be, for example, a price that repeats each month, or a charge that occurs each year.

Recurring Frequency

As opposed to one time charges, these charges indicate charges that occur with varying frequency, such as *weekly, monthly,* or *annual* charges.

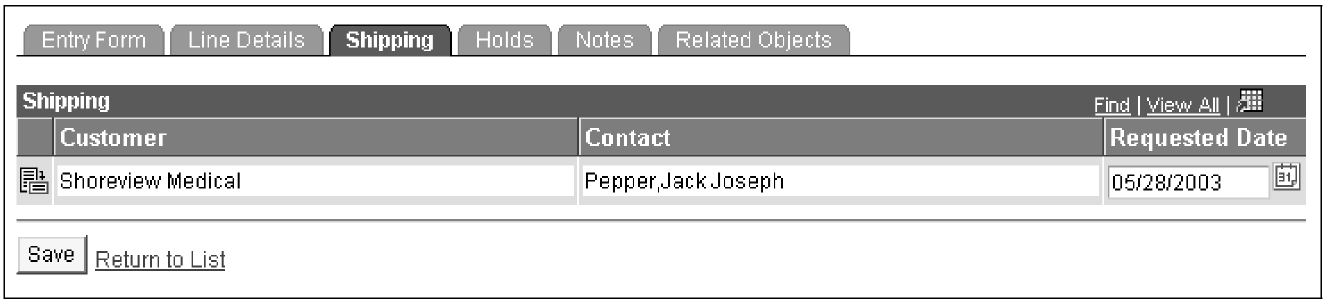
Total Price This is the total price of this order line.

Save Click the *Save* button to add this line to the order.

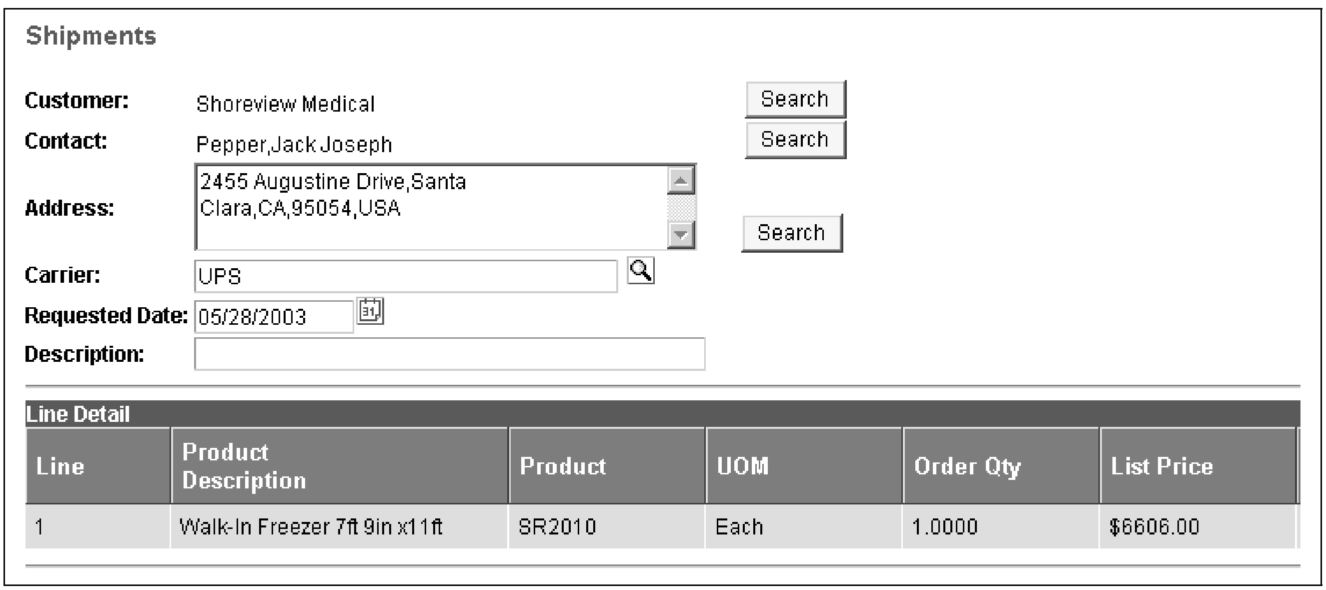
Note. You can order configured products and dynamic packages, but you cannot configure them on the mobile device. If the user orders one or more of these products and submits the order, it will be placed on hold at synchronization time. The Customer Service Representative (CSR) must configure these products from within PeopleSoft Order Capture. You can also exclude these products from being passed to the mobile device by enforcing the appropriate data distribution rules.

Changing or Viewing Shipping Information

Access the Shipping page to view a summary of shipment information. Click the details icon next to a specific customer to access the Shipping (details) page and enter or change shipping information:



Shipping (summary) page



Shipments (details) page

Customer, Contact Change the customer and contact information by clicking the *Search* button and making a different selection.

Address The address where the shipment is delivered. This address defaults primary shipping contact (and primary shipping address for the customer) from the customer data model.

Carrier Select a carrier for this shipment by clicking the *Search* button, and making a selection.

Requested Date Enter a requested arrival date for the shipment here. Note that you can specify a future shipment date.

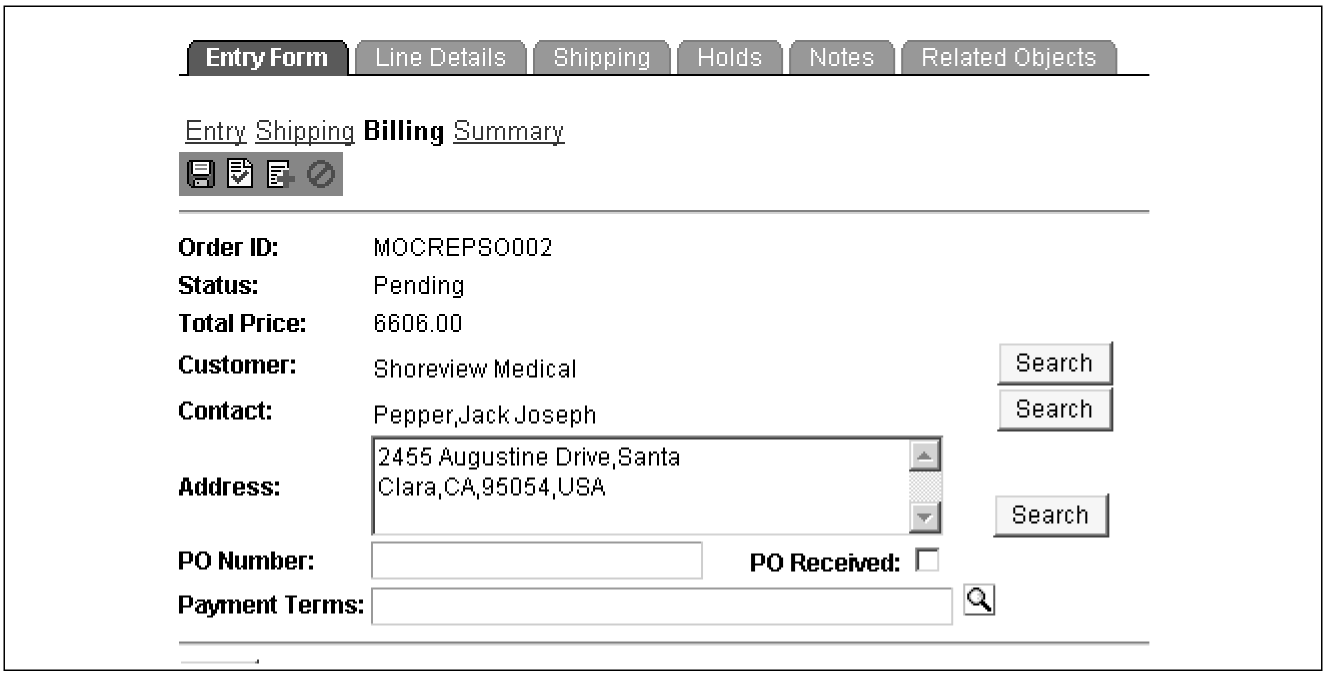
Description Enter any additional shipment information in this field.

Note. Mobile orders are restricted to a single shipment. However, if this order or quote was created in PeopleSoft Order Capture and is shipping to multiple locations, all of those locations will be displayed here. .

The Line Detail grid displays the order lines associated with each ship-to location.

Changing or Viewing Billing Information

Access the Billing page:



Billing page

We have previously explained fields that appear on the Billing page, with the exception of the following:

Customer, Contact Customer and Contact displayed here are the Bill To equivalents, although they are not necessarily the same ones as those that are on the Shipping or Entry Form pages.

Address This address is the billing address. By default, the primary billing contact and the primary billing address are populated from the customer data model.

PO Number Enter the Purchase Order number, if applicable.

PO Received Select this check box if a Purchase Order has been received.

Note. This functionality is designed solely for auditing purposes. There is no attached business logic.

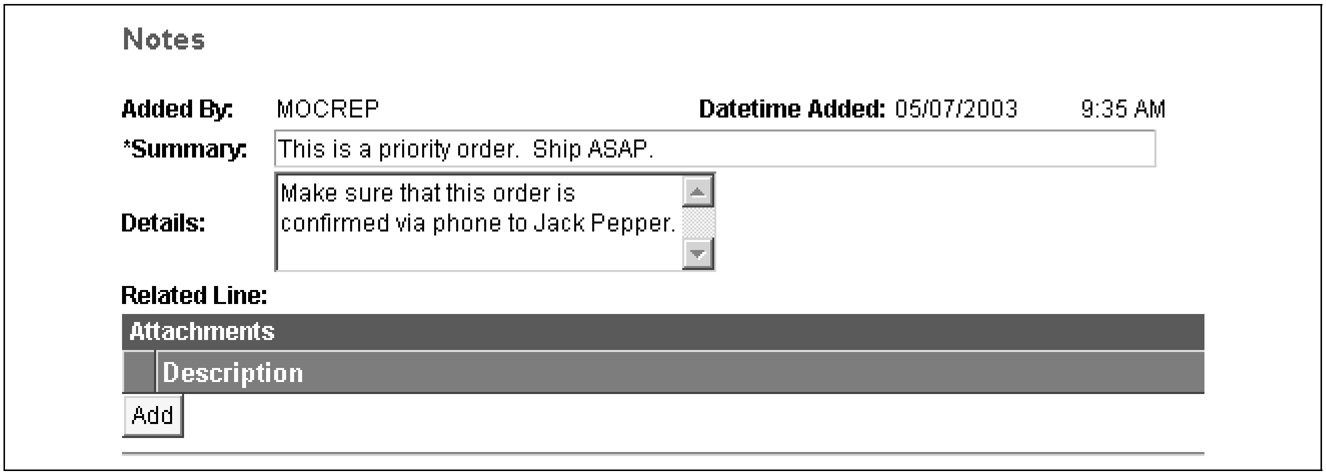
Payment Terms Select terms of payment, such as *Due Immediately.*

Managing Holds

Holds appear on the Holds page. You cannot remove holds in PeopleSoft Mobile Order Capture, you can only view them. Held orders are maintainable; thus you can correct the problems caused by certain holds from the main PeopleSoft Order Capture application. For example, if the order is held because an invalid Bill To customer was specified on the order (or no Bill To customer was specified at all), the user can change the Bill To customer and perform a synchronization. The hold is then lifted.

Adding Notes

Access the Notes summary page, and then click on the details icon to drill into Notes details.



Notes (Detail) page

Viewing Related Actions

View related actions on this page. A related object is data, such as a business project, that is somehow related to the order or quote. If the data exists on the mobile device, you will have the option to link to that data. For example, if there is an sales opportunity associated with this order and it exists on the mobile device, you will be able to transfer to that opportunity from here.

Understanding Third Party and Miscellaneous Calculations

These following third party and miscellaneous charges may be applied to the order during synchronization:

- Pricing discounts, surcharges, or both.
- Freight.
- Tax.
- VAT.
- Product giveaways.

Viewing Existing Orders or Quotes

You may view existing orders or quotes by using the Search Orders and Quotes menu option. The pages will be the same as above. Only quotes, unsubmitted orders, and orders that are on hold can be modified.

APPENDIX A

ISO Country and Currency Codes

PeopleBooks use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

This appendix discusses:

- ISO country codes.
- ISO currency codes.

See Also

"About This PeopleBook," Typographical Conventions and Visual Cues

ISO Country Codes

This table lists the ISO country codes that may appear as country identifiers in PeopleBooks:

ISO Country Code	Country Name
ABW	Aruba
AFG	Afghanistan
AGO	Angola
AIA	Anguilla
ALB	Albania
AND	Andorra
ANT	Netherlands Antilles
ARE	United Arab Emirates
ARG	Argentina
ARM	Armenia
ASM	American Samoa
ATA	Antarctica

ISO Country Code	Country Name
ATF	French Southern Territories
ATG	Antigua and Barbuda
AUS	Australia
AUT	Austria
AZE	Azerbaijan
BDI	Burundi
BEL	Belgium
BEN	Benin
BFA	Burkina Faso
BGD	Bangladesh
BGR	Bulgaria
BHR	Bahrain
BHS	Bahamas
BIH	Bosnia and Herzegovina
BLR	Belarus
BLZ	Belize
BMU	Bermuda
BOL	Bolivia
BRA	Brazil
BRB	Barbados
BRN	Brunei Darussalam
BTN	Bhutan
BVT	Bouvet Island
BWA	Botswana
CAF	Central African Republic
CAN	Canada
CCK	Cocos (Keeling) Islands

ISO Country Code	Country Name
CHE	Switzerland
CHL	Chile
CHN	China
CIV	Cote D’Ivoire
CMR	Cameroon
COD	Congo, The Democratic Republic
COG	Congo
COK	Cook Islands
COL	Colombia
COM	Comoros
CPV	Cape Verde
CRI	Costa Rica
CUB	Cuba
CXR	Christmas Island
CYM	Cayman Islands
CYP	Cyprus
CZE	Czech Republic
DEU	Germany
DJI	Djibouti
DMA	Dominica
DNK	Denmark
DOM	Dominican Republic
DZA	Algeria
ECU	Ecuador
EGY	Egypt
ERI	Eritrea
ESH	Western Sahara

ISO Country Code	Country Name
ESP	Spain
EST	Estonia
ETH	Ethiopia
FIN	Finland
FJI	Fiji
FLK	Falkland Islands (Malvinas)
FRA	France
FRO	Faroe Islands
FSM	Micronesia, Federated States
GAB	Gabon
GBR	United Kingdom
GEO	Georgia
GHA	Ghana
GIB	Gibraltar
GIN	Guinea
GLP	Guadeloupe
GMB	Gambia
GNB	Guinea-Bissau
GNQ	Equatorial Guinea
GRC	Greece
GRD	Grenada
GRL	Greenland
GTM	Guatemala
GUF	French Guiana
GUM	Guam
GUY	Guyana
GXA	GXA - GP Core Country

ISO Country Code	Country Name
GXB	GXB - GP Core Country
GXC	GXC - GP Core Country
GXD	GXD - GP Core Country
HKG	Hong Kong
HMD	Heard and McDonald Islands
HND	Honduras
HRV	Croatia
HTI	Haiti
HUN	Hungary
IDN	Indonesia
IND	India
IOT	British Indian Ocean Territory
IRL	Ireland
IRN	Iran (Islamic Republic Of)
IRQ	Iraq
ISL	Iceland
ISR	Israel
ITA	Italy
JAM	Jamaica
JOR	Jordan
JPN	Japan
KAZ	Kazakstan
KEN	Kenya
KGZ	Kyrgyzstan
KHM	Cambodia
KIR	Kiribati
KNA	Saint Kitts and Nevis

ISO Country Code	Country Name
KOR	Korea, Republic of
KWT	Kuwait
LAO	Lao People’s Democratic Rep
LBN	Lebanon
LBR	Liberia
LBY	Libyan Arab Jamahiriya
LCA	Saint Lucia
LIE	Liechtenstein
LKA	Sri Lanka
LSO	Lesotho
LTU	Lithuania
LUX	Luxembourg
LVA	Latvia
MAC	Macao
MAR	Morocco
MCO	Monaco
MDA	Moldova, Republic of
MDG	Madagascar
MDV	Maldives
MEX	Mexico
MHL	Marshall Islands
MKD	Fmr Yugoslav Rep of Macedonia
MLI	Mali
MLT	Malta
MMR	Myanmar
MNG	Mongolia
MNP	Northern Mariana Islands

ISO Country Code	Country Name
MOZ	Mozambique
MRT	Mauritania
MSR	Montserrat
MTQ	Martinique
MUS	Mauritius
MWI	Malawi
MYS	Malaysia
MYT	Mayotte
NAM	Namibia
NCL	New Caledonia
NER	Niger
NFK	Norfolk Island
NGA	Nigeria
NIC	Nicaragua
NIU	Niue
NLD	Netherlands
NOR	Norway
NPL	Nepal
NRU	Nauru
NZL	New Zealand
OMN	Oman
PAK	Pakistan
PAN	Panama
PCN	Pitcairn
PER	Peru
PHL	Philippines
PLW	Palau

ISO Country Code	Country Name
PNG	Papua New Guinea
POL	Poland
PRI	Puerto Rico
PRK	Korea, Democratic People's Rep
PRT	Portugal
PRY	Paraguay
PSE	Palestinian Territory, Occupie
PYF	French Polynesia
QAT	Qatar
REU	Reunion
ROU	Romania
RUS	Russian Federation
RWA	Rwanda
SAU	Saudi Arabia
SDN	Sudan
SEN	Senegal
SGP	Singapore
SGS	Sth Georgia & Sth Sandwich Is
SHN	Saint Helena
SJM	Svalbard and Jan Mayen
SLB	Solomon Islands
SLE	Sierra Leone
SLV	El Salvador
SMR	San Marino
SOM	Somalia
SPM	Saint Pierre and Miquelon
STP	Sao Tome and Principe

ISO Country Code	Country Name
SUR	Suriname
SVK	Slovakia
SVN	Slovenia
SWE	Sweden
SWZ	Swaziland
SYC	Seychelles
SYR	Syrian Arab Republic
TCA	Turks and Caicos Islands
TCD	Chad
TGO	Togo
THA	Thailand
TJK	Tajikistan
TKL	Tokelau
TKM	Turkmenistan
TLS	East Timor
TON	Tonga
TTO	Trinidad and Tobago
TUN	Tunisia
TUR	Turkey
TUV	Tuvalu
TWN	Taiwan, Province of China
TZA	Tanzania, United Republic of
UGA	Uganda
UKR	Ukraine
UMI	US Minor Outlying Islands
URY	Uruguay
USA	United States

ISO Country Code	Country Name
UZB	Uzbekistan
VAT	Holy See (Vatican City State)
VCT	St Vincent and the Grenadines
VEN	Venezuela
VGB	Virgin Islands (British)
VIR	Virgin Islands (U.S.)
VNM	Viet Nam
VUT	Vanuatu
WLF	Wallis and Futuna Islands
WSM	Samoa
YEM	Yemen
YUG	Yugoslavia
ZAF	South Africa
ZMB	Zambia
ZWE	Zimbabwe

ISO Currency Codes

This table lists the ISO country codes that may appear as currency identifiers in PeopleBooks:

ISO Currency Code	Description
ADP	Andorran Peseta
AED	United Arab Emirates Dirham
AFA	Afghani
AFN	Afghani
ALK	Old Lek
ALL	Lek
AMD	Armenian Dram

ISO Currency Code	Description
ANG	Netherlands Antilles Guilder
AOA	Kwanza
AOK	Kwanza
AON	New Kwanza
AOR	Kwanza Reajustado
ARA	Austral
ARP	Peso Argentino
ARS	Argentine Peso
ARY	Peso
ATS	Schilling
AUD	Australian Dollar
AWG	Aruban Guilder
AZM	Azerbaijanian Manat
BAD	Dinar
BAM	Convertible Marks
BBD	Barbados Dollar
BDT	Taka
BEC	Convertible Franc
BEF	Belgian Franc
BEL	Financial Belgian Franc
BGJ	Lev A/52
BGK	Lev A/62
BGL	Lev
BGN	Bulgarian LEV
BHD	Bahraini Dinar
BIF	Burundi Franc
BMD	Bermudian Dollar

ISO Currency Code	Description
BND	Brunei Dollar
BOB	Boliviano
BOP	Peso
BOV	Mvdol
BRB	Cruzeiro
BRC	Cruzado
BRE	Cruzeiro
BRL	Brazilian Real
BRN	New Cruzado
BRR	Brazilian Real Dollar
BSD	Bahamian Dollar
BTN	Ngultrum
BUK	N/A
BWP	Pula
BYB	Belarussian Ruble
BYR	Belarussian Ruble
BZD	Belize Dollar
CAD	Canadian Dollar
CDF	Franc Congolais
CHF	Swiss Franc
CLF	Unidades de fomento
CLP	Chilean Peso
CNX	Peoples Bank Dollar
CNY	Yuan Renminbi
COP	Colombian Peso
CRC	Costa Rican Colon
CSD	Serbia Dinar

ISO Currency Code	Description
CSJ	Krona A/53
CSK	Koruna
CUP	Cuban Peso
CVE	Cape Verde Escudo
CYP	Cyprus Pound
CZK	Czech Koruna
DEM	Deutsche Mark
DJF	Djibouti Franc
DKK	Danish Krone
DOP	Dominican Peso
DZD	Algerian Dinar
ECS	Sucre
ECV	Unidad de Valor
EEK	Kroon
EGP	Egyptian Pound
EQE	Ekwele
ERN	Nakfa
ESA	Spanish Peseta
ESB	Convertible Peseta
ESP	Spanish Peseta
ETB	Ethiopian Birr
EUR	euro
FIM	Markka
FJD	Fiji Dollar
FKP	Falklands Isl. Pound
FRF	French Franc
GBP	Pound Sterling

ISO Currency Code	Description
GEK	Georgian Coupon
GEL	Lari
GHC	Cedi
GIP	Gibraltar Pound
GMD	Dalasi
GNE	Syli
GNF	Guinea Franc
GNS	Syli
GQE	Ekwele
GRD	Drachma
GTQ	Quetzal
GWE	Guinea Escudo
GWP	Guinea-Bissau Peso
GYD	Guyana Dollar
HKD	Hong Kong Dollar
HNL	Lempira
HRD	Dinar
HRK	Kuna
HTG	Gourde
HUF	Forint
IDR	Rupiah
IEP	Irish Pound
ILP	Pound
ILR	Old Shekel
ILS	New Israeli Sheqel
INR	Indian Rupee
IQD	Iraqi Dinar

ISO Currency Code	Description
IRR	Iranian Rial
ISJ	Old Krona
ISK	Iceland Krona
ITL	Italian Lira
JMD	Jamaican Dollar
JOD	Jordanian Dinar
JPY	Yen
KES	Kenyan Shilling
KGS	Som
KHR	Riel
KMF	Comoro Franc
KPW	North Korean Won
KRW	Won
KWD	Kuwaiti Dinar
KYD	Cayman Islands dollar
KZT	Tenge
LAJ	Kip Pot Pol
LAK	Kip
LBP	Lebanese Pound
LKR	Sri Lanka Rupee
LRD	Liberian Dollar
LSL	Loti
LSM	Maloti
LTL	Lithuanian Litas
LTT	Talonas
LUC	Convertib Francl
LUF	Luxembourg Franc

ISO Currency Code	Description
LUL	Financial Franc
LVL	Latvian Lats
LVR	Latvian Ruble
LYD	Libyan Dinar
MAD	Moroccan Dirham
MAF	Mali Franc
MDL	Moldovan Leu
MGF	Malagasy Franc
MKD	Denar
MLF	Mali Franc
MMK	Kyat
MNT	Tugrik
MOP	Pataca
MRO	Ouguiya
MTL	Maltese Lira
MTP	Maltese Pound
MUR	Mauritius Rupee
MVQ	Maldive Rupee
MVR	Rufiyaa
MWK	Malawian Kwacha
MXN	Mexican Peso
MXP	Mexican Peso
MXV	Mexican UDI
MYR	Malaysian Ringgit
MZE	Mozambique Escudo
MZM	Metical
NAD	Namibia Dollar

ISO Currency Code	Description
NGN	Naira
NIC	Cordoba
NIO	Cordoba Oro
NLG	Netherlands Guilder
NOK	Norwegian Krone
NPR	Nepalese Rupee
NZD	New Zealand Dollar
OMR	Rial Omani
PAB	Balboa
PEI	Inti
PEN	Nuevo Sol
PES	Sol
PGK	Kina
PHP	Philippine Peso
PKR	Pakistan Rupee
PLN	Zloty
PLZ	Zloty
PTE	Portuguese Escudo
PYG	Guarani
QAR	Qatari Rial
ROK	Leu A/52
ROL	Leu
RUB	Russian Ruble
RUR	Russian Federation Rouble
RWF	Rwanda Franc
SAR	Saudi Riyal
SBD	Solomon Islands

ISO Currency Code	Description
SCR	Seychelles Rupee
SDD	Sudanese Dinar
SDP	Sudanese Pound
SEK	Swedish Krona
SGD	Singapore Dollar
SHP	St Helena Pound
SIT	Tolar
SKK	Slovak Koruna
SLL	Leone
SOS	Somali Shilling
SRG	Surinam Guilder
STD	Dobra
SUR	Rouble
SVC	El Salvador Colon
SYP	Syrian Pound
SZL	Lilangeni
THB	Baht
TJR	Tajik Ruble
TJS	Somoni
TMM	Manat
TND	Tunisian Dinar
TOP	Pa’anga
TPE	Timor Escudo
TRL	Turkish Lira
TTD	Trinidad Dollar
TWD	New Taiwan Dollar
TZS	Tanzanian Shilling

ISO Currency Code	Description
UAH	Hryvnia
UAK	Karbovanet
UGS	Uganda Shilling
UGW	Old Shilling
UGX	Uganda Shilling
USD	US Dollar
USN	US Dollar (Next day)
USS	US Dollar (Same day)
UYN	Old Uruguay Peso
UYP	Uruguayan Peso
UYU	Peso Uruguayo
UZS	Uzbekistan Sum
VEB	Bolivar
VNC	Old Dong
VND	Dong
VUV	Vatu
WST	Tala
XAF	CFA Franc BEAC
XAG	Silver
XAU	GOLD
XBA	European Composite Unit
XBB	European Monetary Unit
XBC	European Unit of Account 9
XBD	European Unit of Account 17
XCD	East Caribbean Dollar
XDR	SDR
XEU	EU Currency (E.C.U)

ISO Currency Code	Description
XFO	Gold-Franc
XFU	UIC-Franc
XOF	CFA Franc BCEAO
XPD	Palladium
XPF	CFP Franc
XPT	Platinum
XTS	For Testing Purposes
XXX	Non Currency Transaction
YDD	Yemeni Din
YER	Yemeni Rial
YUD	New Yugoslavian Dinar
YUM	New Dinar
YUN	Yugoslavian Dinar
ZAL	Financial Rand
ZAR	Rand
ZMK	Zambian Kwacha
ZRN	New Zaire
ZRZ	Zaire
ZWC	Rhodesian Dollar
ZWD	Zimbabwe Dollar

Glossary of PeopleSoft Terms

absence entitlement This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.

absence take This element defines the conditions that must be met before a payee is entitled to take paid time off.

accounting class In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.

accounting date The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.

accounting split The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.

accumulator You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

action reason The reason an employee’s job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

activity In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

agreement — In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.

allocation rule — In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.

alternate account — A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.

AR specialist — Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.

arbitration plan — In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.

assessment rule — In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer’s account or of individual items to determine whether to generate a follow-up action.

asset class — An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.

attribute/value pair — In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.

authentication server — A server that is set up to verify users of the system.

base time period — In PeopleSoft Business Planning, the lowest level time period in a calendar.

benchmark job — In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.

book — In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.

branch — A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.

budgetary account only — An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called “system-maintained account.”

budget check — In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.

budget control — In commitment control, budget control ensures that commitments and expenditures don’t exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document’s cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.

budget period — The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.

business event — In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).

business unit — A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.

buyer — In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.

catalog item — In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.

catalog map — In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog.

catalog partner — In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.

categorization — Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.

channel — In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.

ChartField — A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.

ChartField balancing — You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit — The process of editing journal lines for valid ChartField combinations based on user-defined rules.

ChartKey — One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.

checkbook — In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.

Class ChartField — A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*

clone — In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

collection — To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.

collection rule	In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
condition	In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.
	In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data elements	Data elements, at their simplest level, define a subset of data and the rules by which to group them.
	For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method	In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method. In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.
delivery method type	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
directory information tree	In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.
document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM ledger	Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
elimination set	In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
event	A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete. In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.
event propagation process	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects.

	Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.
fund	In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
group	In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs). In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
incentive rule	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
incur	In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
item	In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained. In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
KPI	An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file	Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft data and directory data.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.
learning components	In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
learning environment	In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
load	In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.
local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.
logistical task	In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new

laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

market template In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.

match group In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

MCF server Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

merchandising activity In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

meta-SQL Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

metastring Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

multibook In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

multicurrency The ability to process transactions in a currency other than the business unit's base currency.

national allowance In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

node-oriented tree A tree that is based on a detail structure, but the detail values are not used.

pagelet Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

participant In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.

participant object Each participant object may be related to one or more compensation objects.

See also *compensation object.*

partner A company that supplies products or services that are resold or purchased by the enterprise.

pay cycle In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.

pending item In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
price list	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

price rule condition	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
price rule key	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.
progress log	In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for *record input value-added tax flag.* Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT

on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.

record output VAT flag Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

reference data In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.

reference object In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

reference transaction In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

regional sourcing In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

relationship object In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

remote data source data Data that is extracted from a separate database and migrated into the local database.

REN server Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

role Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

role user A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.

roll up In a tree, to roll up is to total sums based on the information hierarchy.

run control A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.

run control ID A unique ID to associate each user with his or her own run control table entries.

run-level context
In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.

search query
You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.

section
In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.

security event
In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

serial genealogy
In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production
In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

session
In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

session template
In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

setup relationship
In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

share driver expression
In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

single signon
With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.

source transaction
In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.

SpeedChart
A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.

SpeedType
A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

staging
A method of consolidating selected partner offerings with the offerings from the enterprise’s other partners.

statutory account Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.

subcustomer qualifier A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

Summary ChartField You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).

summary ledger An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.

summary time period In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

summary tree A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

syndicate To distribute a production version of the enterprise catalog to partners.

system function In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.

TableSet A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.

TableSet sharing Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.

target currency The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

template A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

territory In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

TimeSpan A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather

	than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
trace usage	In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and "picked up" by a different section for further processing.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
user interaction object	In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
variable	In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

work order In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.

worksheet A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

worklist The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

XML schema An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.

yield by operation In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

zero-rated VAT Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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