



PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook

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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.
<i>Italics</i>	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 <i>O</i> .
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)	<p>When placed before a parameter in PeopleCode syntax, an ampersand indicates that the parameter is an already instantiated object.</p> <p>Ampersands also precede all PeopleCode variables.</p>

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 *About These PeopleBooks*, “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 B, “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 CRM Services Foundation Preface

This preface discusses:

- PeopleSoft CRM application fundamentals.
- PeopleSoft CRM automation and configuration tools.
- PeopleSoft business object management.
- PeopleSoft product and item management.
- PeopleTools PeopleBooks.

PeopleSoft CRM Application Fundamentals

The *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook* contains essential information describing the setup and design of the PeopleSoft CRM system. This book contains important topics that apply to many or all PeopleSoft applications across the PeopleSoft CRM product line.

The *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook* contains these parts:

- CRM Multi-Product Foundation.

This part discusses the design and setup of the PeopleSoft CRM system, including security considerations.

- Workforce Management.

This part discusses PeopleSoft CRM workflow, the Active Analytics Framework (AAF), business projects, and scripts.

- Interactions and 360-Degree Views.

This part discusses how to manage interactions and set up and use the 360-degree view, a powerful tool that enables users to view and work with any transaction or interaction that is associated with a customer or worker.

- Self-Service for Customers.

This part discusses how to set up, administer, and use self-service applications for customers and workers.

- Relationship Management.

This part discusses how system users manage their contacts and tasks.

- Entitlement Management.

This part discusses setting up agreements and warranties.

- SmartViews.

This part discusses how to set up and use SmartViews to manage key customer segments and accounts in a central environment.

PeopleSoft CRM Automation and Configuration Tools

The *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook* discusses automation and configuration tools that are common to multiple CRM applications. This is an essential companion to the application *PeopleBook*.

There are four parts to the *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*:

- Correspondence management.

This part discusses the setup and application of manual notifications, automatic notifications and manual correspondence requests among CRM objects.

- Automation tools.

This part discusses PeopleSoft CRM workflow, the Active Analytics Framework (AAF), business projects, and scripts.

- Configuration tools.

This part discusses configurable search pages, configurable toolbars, attributes, display templates and industry-specific field labels and field values.

- Knowledge management.

This part discusses the setup of Natural Language Processing (NLP) and Verity search.

PeopleSoft CRM Business Object Management

The *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook* discusses how to create and manage customer and worker business objects in PeopleSoft CRM.

The *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook* has these parts:

- Business Object Management Basics.

This part provides an overview of the business object relationship model and discusses setting up role types, relationship types, and control values.

- Data Management for Organization Business Objects.

This part discusses how to set up and manage companies, sites, and partner companies.

- Data management for Individual Business Objects.

This part discusses how to set up and manage persons, including contacts and consumers, and workers.

- Business Object Management.

This part discusses how to define and use business object searches, quick create, and the customer identification framework to manage business objects.

- Customer and Worker Data Integrations.

This part discusses how to integrate customer and worker data with other systems. *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*.

PeopleSoft Product and Item Management

The *PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook* discusses how to set up products in PeopleSoft CRM, including installed products, product packages, and products that are service offerings such as service agreements and warranties.

PeopleTools PeopleBooks

Cross-references to PeopleTools documentation refer to the PeopleSoft Enterprise PeopleTools 8.5 PeopleBooks.

PART 1

Getting Started

Chapter 1

Getting Started with PeopleSoft CRM Services Foundation

CHAPTER 1

Getting Started with PeopleSoft CRM Services Foundation

This chapter provides an overview of the PeopleSoft CRM Services Foundation PeopleBook and discusses:

- PeopleSoft services foundation business processes.
- PeopleSoft services foundation implementation.

PeopleSoft Services Foundation Overview

This book discusses the common foundational objects that are shared among PeopleSoft Integrated FieldService, the call center applications (PeopleSoft Support, HelpDesk and HelpDesk for Human Resources), and industry solutions that leverage the functionality of these core applications. These objects are used in service orders and cases to provide solution management, integration with PeopleSoft Transaction Billing Processor, and geographical information lookup capabilities.

Solution management, and integration with Transaction Billing Processor are available to PeopleSoft Integrated FieldService and most call center applications. Geographical information lookup, also known as the Environmental Systems Research Institute (ESRI) integration, is available to PeopleSoft Integrated FieldService and Support.

PeopleSoft Services Foundation Business Processes

This section discusses the business processes associated with solution, time management, integration with PeopleSoft Transaction Billing Processor, and ESRI integration. We discuss these business processes in the business process chapters in this PeopleBook.

Solution Management Business Process

Solution management enables users to establish a set of predefined solutions that can be used by call center agents and field service technicians to resolve customer problems.

Time Management Business Process

Time management enables users to log time for the work performed on cases. Field service technicians and managers use a different page that is embedded in the service order component

Transaction Billing Processor Integration Business Process

Transaction Billing Processor integration provides the ability to bill and book revenue through PeopleSoft Contracts for recurring and on-demand services and agreements. The fees sent to PeopleSoft Transaction Billing Processor includes agreement fees, service order fees (including service, material, time, and expense fees), and case fees.

ESRI Integration Business Process

The integration with ESRI, a third-party mapping software, enables users to view the location of reported cases and field service activities through the Map Dashboard.

PeopleSoft Services Foundation Implementation

PeopleSoft Setup Manager enables you to review a list of setup tasks for your organization for the products 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 Integrated FieldService and call center applications provide component interfaces to help you load data from your existing system into PeopleSoft tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

Each product's Getting Started chapter contains specific implementation and component interface information for that product. This PeopleBook includes information about solution management, time management, contracts and billing integration, and integration with ESRI.

See *PeopleSoft Enterprise Setup Manager for Customer Relationship Management 8.9 PeopleBook*

See *PeopleSoft Enterprise PeopleTools 4.5 PeopleBook: PeopleSoft Component Interfaces*

Other Sources of Information

In the planning phase of the 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 CRM Application Fundamentals 8.9 PeopleBook* with information about where to find the most current version of each.

See Also

PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook, "Getting Started with PeopleSoft Enterprise CRM Call Center Applications"

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, "Getting Started with PeopleSoft Integrated FieldService"

PART 2

Solution Management

Chapter 2
Setting Up Solution Management

Chapter 3
Managing Solutions

Chapter 4
Using Solutions

CHAPTER 2

Setting Up Solution Management

This chapter provides an overview of solution management setup and discusses how to:

- Set up solution management prompt tables.
- Define record-based search index templates.
- Set up solution history tracking.

Understanding Solution Management Setup

Solutions are resolutions to problems. They exist independently from the cases, service orders, defects, and email responses to which they can be applied.

This section discusses:

- Solution relationship types.
- Solution libraries.
- Solution search templates.
- Solution history.

Solution Relationship Types

Solutions can be related to other solutions. You can relate solutions manually or automatically. When you relate solutions, you must qualify the relationship using a solution relationship type. Predefined types are *Similar* and *Duplicate*.

Solution relationship types, unlike case relationship types, are never hierarchical. The system uses the same relationship label for both solutions. (That is, if solution A is similar to solution B, then solution B is similar to solution A.)

Solution Libraries

Solution libraries enable you to group solutions into functional areas within a setID. For example, you can create solution libraries for each of your product lines. This level of categorization improves search effectiveness in PeopleSoft call center applications: Solution for cases enables users to choose libraries to include in the search domain. Solution for service orders does not filter solutions based on library.

Secondary Libraries

Libraries can be associated with other, secondary, libraries. When this occurs, solutions in the primary library can be given a secondary association with the secondary libraries. The same library can be a primary library for some solutions and a secondary library for other solutions.

A solution's secondary library associations do not affect processing. Specifically, Solutions does not use the solution's secondary library to access the solution. For example, an agent who uses Solutions to search library A will find only solutions that have a primary association with library A, not solutions that have a secondary association with it.

The only reason to give solutions secondary associations with libraries is if your organization designs administrative processes or reports based on secondary associations.

FAQ Libraries

The Frequently Asked Questions self-service page gives PeopleSoft Support self-service customers access to solutions whose primary library is set up as a frequently asked question (FAQ) library. To set up a library as a FAQ library, give it a secondary library called FAQ.

For example, if the library called FAQ is a secondary library for libraries X and Y but not for Z, then libraries X and Y appear in the drop-down list box from which customers can select a topic on the Frequently Asked Questions page. Library Z does not.

A customer who selects library X sees all solutions that have a primary association with X, regardless of any secondary associations. However, you can prevent a solution from appearing as a FAQ by setting its visibility to *Internal*.

Note. Self Service FAQ functionality is applicable to Customer Self Service and Employee Self Service for PeopleSoft Support, HelpDesk, and HelpDesk for Human Resources customers. PeopleSoft FieldService does not utilize FAQ functionality.

See Also

PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook, “Configuring Self-Service Applications”

Solution Search Templates

PeopleSoft CRM provides multiple versions of solutions. Different versions search different objects. For example, solutions for PeopleSoft FieldService searches only solutions, while solutions for cases also searches cases, troubleshooting scripts, defects and fixes.

You can use the solution and error message search collection in various ways. In the three PeopleSoft CRM call center applications (PeopleSoft Support, HelpDesk, and HelpDesk for Human Resources), solution functionality is used to search for objects that can help resolve a case. Search groups determine which objects are searchable in agent-facing and self-service versions of solution searching.

The agent-facing version searches solutions. It also searches cases, troubleshooting scripts, fixes, and defects which can lead the searcher to a solution. The self-service version searches only solutions. Both versions enable users to associate selected solutions with the case from which the solution search was invoked. The self-service version additionally enables self-service users to search for solutions outside the context of a case.

In PeopleSoft FieldService, the system searches for solutions that are relevant to a service order. PeopleSoft FieldService does not track solution usage for service orders; search results are informational only.

Like solution searches for cases, the type of object that gets searched (solutions only) is controlled through search group configuration. As delivered, the system searches for solutions for service orders searches only

Note. To be searchable, an object must have a search index template that defines the fields included in the search collection. PeopleSoft delivers search index templates for solutions, cases, and troubleshooting scripts.

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Setting Up Search Collections,” Understanding PeopleSoft CRM Searching

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Setting Up Search Collections,” Search Index Templates

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Setting Up Correspondence Templates,” Template Architecture

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Setting Up Search Collections”

Solution History

Solutions History is a system-delivered action type. Solutions history logs information into the History Page of the Solution component. This is a solution specific action and cannot be used for other applications. You can determine which policy caused the history item to be logged since the policy name appears in the history grid. The details can contain terms, which are resolved at run time. This action is usually invoked after a solution is saved.

The system uses Active Analytics Framework (AAF) to create solution history items. Terms are managed in the AAF data library. They point to disparate pieces of data residing in places like data warehouses, external databases, or operational environments. They are metadata that provide information about the physical data and can be resolved into actual data to be used in PeopleSoft CRM. When users send template-based letters or email, the system merges both static text and resolved data into the template to produce the final correspondence.

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Working with Active Analytics Framework,” Understanding Active Analytics Framework

Setting Up Solution Management Prompt Tables

To setup solution libraries, use the Solution Library Setup (RC_SOLN_LIB_SETUP) and Solution Relationship Table (RC_SOLN_RLT_TBL) components.

This section discusses how to:

- Define solution relationship types.
- Define solution libraries.

Pages Used to Set Up Solution Management Prompt Tables

Page Name	Object Name	Navigation	Usage
Solution Relationship Type	RC_SOLN_REL_TYPE	Set Up CRM, Product Related, Solution, Solution Relationship Type, Solution Relationship Type	Define how solutions can be related.
Solution Library Setup	RC_SOLN_LIB_SETUP	Set Up CRM, Product Related, Solution, Solution Library, Solution Library Setup	Create solution libraries.

Defining Solution Relationship Types

Access the Solution Relationship Type page..

Solution Relationship Type

Customize | Find | First 1-2 of 2 Last

*Solution Relationship Type	*Relationship Name	Relationship Description		
DUP	Duplicate	Duplicate	+...	-
SIM	Similar	Similar	+...	-

* Required Field

Save Add

Solution Relationship Type page

Solution Relationship Type Enter a unique identifier for the relationship type.

Relationship Name and Relationship Description Enter a short and long description of the relationship. The short description appears on the pages where you establish and review solution relationships.

Defining Solution Libraries

Access the Solution Library Setup page.

Solution Library Setup

Library Details

SetID COM01

Library ID NTWK

***Name** Network Performance

☒ **Searchable in Solution Advisor**

☐ **Default Libraries Selected?**

Description

Solution Library Defaults

*Solution Library	Changed By	Last Modified
FAQ	Allen,Edward	02/12/2002 12:20PM

Modified 02/24/2004 10:07AM PST SAMPLE

* Required Field

Save Return to Search Next in List Previous in List Add Update/Display

Solution Library Setup page

- Name** Enter a library name. If this library is associated with the library FAQ, then the name you enter is exposed to self-service users in the Customer Care - Frequently Asked Questions page.
- Searchable in Solution Advisor** Select to let Solution Advisor users select this library for searching.
- Default Libraries Selected** Select if you are adding default libraries to the page.
- Solution Library Defaults** A solution is always owned by a single library, but it can also be associated with other secondary libraries. The library defaults is a list of secondary libraries.
- To set up this library so that it is available for selection in the self-service Frequently Asked Questions page, enter *FAQ* as a secondary library.

See Also

PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook, “Configuring Self-Service Applications”

Defining Record-Based Search Index Templates

Define search index templates for the PeopleSoft CRM search collection. Use the Search Index Template page to record-based search index templates and identify record fields to include in the search collection.

The Search Index Template page displays the collection that the search index template is associated with and is used to establish search collections and parameters that are used to build them on the Search Settings page.

Select the fields to include in the collection as searchable fields. When you configure solution search groups, only these fields are available for field-level searching.

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Setting Up Search Collections,” Defining Record-Based Indexes

Setting Up Solution History Tracking

Use AAF to define which events are captured in a solution’s history.

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Working with Active Analytics Framework,” Configuring Actions in Policies

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Working with Active Analytics Framework,” Configuring Case History Actions

CHAPTER 3

Managing Solutions

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

- Create solutions.
- Relate solutions automatically.
- Update solution usage counts and linkages.
- Merge similar solutions.

Understanding Solutions

Solutions are resolutions to problems. A well-established set of predefined solutions for common problems helps resolve customer problems quickly and efficiently.

This section discusses:

- Solution creation.
- Solution deactivation.
- Solution use in PeopleSoft CRM applications.
- Solution usage counts and linkages.

Solution Creation

Solutions can be created manually or by merging solutions. You can create solutions:

- When a user creates a new text resolution for a case.

Within PeopleSoft call center applications and PeopleSoft FieldService users can use solutions to explain how problems were resolved for cases and service orders. When this occurs, the system uses the text to create a new solution of type *Adhoc*. Using PeopleSoft ERMS (email response management system) users can also attach solutions to emails in a way that's similar to the method users would use to attach solutions to cases and service orders. In PeopleSoft Quality users can only search solutions. They may not attempt or associate them to defects.

- When a self-service user closes a call center case using a predefined reason.

If you do not associate solutions with the case closure reasons that you create, then the first time a self-service user closes a case using one of the predefined reasons, the system uses the reason description to create a new solution of type of *Canned*. The system associates this solution with the reason.

The only way to edit a solution is through the Solution component.

See Also

PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook, “Configuring Self-Service Applications,” Associating Solutions with Reasons for Closing Cases

Solution Deactivation

Over time, even a well-managed solution set can end up with similar or duplicate solutions.

You deactivate a solution by giving it an expiration date. When you run the Update Solution Usage Counts process, the system sets the solution status to *Expired* in all solutions with dates passed the expiration dates.

You can associate an expired solution with a replacement solution. This is useful for solutions that explain a problem or suggest a temporary fix without resolving the problem. When a true solution becomes available, you can give the temporary solution an expiration date and cross-reference the new solution.

The ability to give a solution an expiration date is particularly important in call center applications. This is because there may be cases associated with a solution, and deleting or modifying the original solution compromises the data integrity. (Expired solutions that are associated with cases are still accessible from those cases, but they are no longer found by the solution search process.)

When you merge solutions, you create a master solution that supersedes one or more similar solutions. The status of the superseded solutions changes to *Superseded*, and the superseded solutions cross-reference the new master solution.

Solution Use in PeopleSoft CRM Applications

Solutions can apply to problems tracked through service orders, call center cases, defects and resolutions, and email. Field service technicians and call center agents use solutions differently.

Using Solutions in PeopleSoft Integrated FieldService

PeopleSoft Integrated FieldService users may view existing solutions from service orders and add new ones as they resolve problems. PeopleSoft Integrated FieldService tracks which solutions are used for specific service orders. Field service technicians can both view solutions and enter new ones.

Using Solutions in PeopleSoft Call Center Applications

PeopleSoft Support, PeopleSoft HelpDesk, and PeopleSoft HelpDesk for Human Resources users can relate solutions to cases.

PeopleSoft call center applications track not only the final solution to a case, but also failed solutions and other solutions considered. By tracking solution usage, you capture valuable information about your solution set.

Call center applications track solution usage by associating solutions to cases and using the solution Status field to indicate whether the solution solved the case. The interface is different in the agent-facing case page and the self-service case page, but the underlying data structures are the same for all users.

Using Solutions in PeopleSoft Quality Management

PeopleSoft Quality Management enable you to track both the final solution (the one that resolved the caller’s problem) and other solutions that were considered. By tracking all solution usage, you capture valuable information about the effectiveness of your solution set.

Using Solutions

Both field service technicians and call center users (agents and self-service users) can search for solutions using the Solutions page. Solutions for cases, service orders, and email provides search functionality, including the ability to associate a solution with the case, service order or email from which the search originated.

When you use Solutions page to search for solutions, search results are ranked by relevance. Relevance scores range from 1 to 100, with 100 representing the highest relevance.

In addition PeopleSoft provides a suggested solutions functionality which used Natural Language Processing (NLP). This is done using a third-party software application called Banter. NLP enables PeopleSoft CRM applications to automate certain business tasks by running concept-based content analysis on information it receives and providing appropriate suggestions that can be used to drive business processes.

Over time the knowledge base matures with numerous established categories. The system associates each category with a significant number of concepts. When NLP receives a request to suggest a solution to solve a case or service order it:

1. Extracts concepts from the case.
2. Scans the knowledge base for categories (solutions) that have matching concepts.
3. Sends the solutions back to the case or service order as suggestions.

A solution's relevance score is calculated based on how well the search criteria match the solution. The search index template for solutions determines which fields are searched to determine if there is a match.

Call center agents have additional ways of finding solutions for a case. They can or access the Solutions page and then

- Search the solutions on the Frequently Used Solutions page by product, by error code, or by category, type, and detail.
- Search for solutions on the FAQ (frequently asked questions) page.
- Search for solutions on the Suggested Solutions page

Note. Suggested Solutions requires an additional purchase of Banter's NLP application.

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, "Setting Up Natural Language Processing," Understanding Natural Language Processing

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, "Setting Up Search Collections"

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, "Working with My Service Orders"

[Chapter 4, "Using Solutions," page 35](#)

PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook, "Managing Cases"

Solution Usage Counts and Linkages

Because PeopleSoft call center and field service applications enable you to track the application of a solution to cases and service orders, the system can track resolution-related metrics for each solution.

This table describes the resolution metrics that are tracked:

Number	Description
Solved count	<p>Indicates how many cases or service orders the solution has resolved.</p> <p>This number is informational only; Solution Advisor displays this number to help you determine a solution's potential.</p> <p>This number increases by one every time that you set a solution status to <i>Successful Resolution</i>. The number decreases by one if you change the status of a solution formerly designated as successful.</p>
Usage count	<p>Indicates how many cases or service orders that the solution has been associated with, regardless of whether the solution was successful.</p> <p>This number is a minor factor in determining the relevance score when you use Solution Advisor to search for solutions.</p> <p>This number increases by one every time that you associate the solution with a case or service order. The number decreases by one if you change the solution status to <i>Withdrawn</i>.</p>
Usage count by product	<p>Indicates how many times the solution resolved cases or service orders for the products that are associated with the solution (these products are listed on the Related Actions page in the Solution component).</p> <p>This number is used to determine which solutions appear on the Frequently Used Solutions page.</p>
Usage count by error	<p>Works like usage count by product, but is based on the error message recorded for a case rather than on the product recorded for a case. This usage count pertains to the Frequently Used Solutions page and is used the same way that it is used for products.</p>
Usage count by category/type/detail	<p>Works like usage count by product, but is based on the category, type, and details recorded for a case rather than on the product recorded for a case. This usage count pertains to the Frequently Used Solutions page and is used the same way that it is used for category, type, and details.</p>

The system normally maintains the solved count and the (overall) usage count by increasing and decreasing the values as you work with solutions. But you can reset the counts based using either a specified date range or all dates. To do this, run the Update Solution Usage Counts process. This process is also the only mechanism for updating the usage count by product, error, or category/type/detail.

Creating Solutions

To define solutions, use the Solution (RC_SOLUTION) component.

This section discusses how to:

- Define solutions.

- Track notes and attachments.
- Identify secondary solution libraries.
- Manage relationships with cases, products, errors, and other solutions.
- Manage relationships with service orders, products and other solutions.
- Relate solutions.
- View solution history.

Pages Used to Create Solutions

Page Name	Object Name	Navigation	Usage
Solution	RC_SOLN_DETAILS	Solutions, Solution, Solution	Create and deactivate solutions.
Solution - Notes	RC_SOLN_NOTES	Solutions, Solution, Notes	Add notes or attachments.
Solution - Libraries	RC_SOLN_LIBRARY	Solutions, Solution, Libraries	Identify libraries to which the solution belongs. When users search for solutions using Solution Advisor, they can choose which libraries to search.
Solution - Case Related Actions	RC_SOLN_SIMILAR	Solutions, Solution, Case Related Actions	Review the solutions, cases, products, and errors, and category/type/detail that are related to this solution, and create relationships with other solutions and products.
Solution - Service Order Related Actions,	RF_SOLN_SIMILAR	Solutions, Solution, Service Order Related Actions	Review the solutions, service orders, and products that are related to this solution, and create relationships with other solutions and products.
Relate Existing Solution	RC_SOLREL_TYPE_SEC	Click the Relate an Existing Solution button on the Case Related Actions page.	Identify a related solution and the relationship type. Note. This page is used for the both the case and service order related actions.
Solution - History	RC_SOLN_HISTORY	Solutions, Solution, History	Review a history of important events in the life of the solution.
Solution Summary	RC_SOLN_SUMMARY	Click the Summary link on the Solution page.	View solution summary information for the current solution.
Solution Summary	RC_SOLN_SUMMARY_RL	Click the solution ID for a related solution on the Solution - Related Actions page.	View solution summary information for a solution related to the current solution.

Defining Solutions

Access the Solution page.

Solution

Save Refresh Personalize

Solution ID 301028 **Usage Count** 0
Summary Modem Dials But No Answer **Solved Count** 0

Solution Notes Libraries Case Related Actions Service Order Related Actions History

Details

*Type Standard Library Network Performance
 *Status Active ☒ Include in F.A.Q.
 *Visibility All Summary
 Superseded by Expired or Superseded Date

Description

*Summary Modem Dials But No Answer
 Keywords No Answer
 Symptoms No response from DSL Modem
 Details Verify that modems are not answering by using any telephone to dial in and listen. Please gather the info and pass on to level 2 if problem continues.

Solution page

Solved Count and Usage Count

Displays the number of cases that the solution is associated with and the number of cases that the solution successfully resolved. These numbers are updated when you run the Update Solution Usage Counts process.

Type

Normally, select either *Standard* or *Workaround*.

Solutions created when agents enter an independent text resolution are given the type *Adhoc*. You can convert these to standard solutions by changing the type.

Solutions created when a agent or technician uses external content to resolve a service order are given a solution of type of *Link*.

Solutions created when self-service users choose predefined case closure reasons are given the type of *Canned*.

Library

Select the solution's primary library. This library is considered the solution's owning library. Libraries are defined on the Solution Library Setup page. The case Solution Advisor searches solutions by library.

Status

Select from:

Active: The solution is approved and available to users.

Draft: The solution is not yet approved. Unless you modify the delivered search index templates, the search collection does not include draft solutions. Therefore, these solutions are not accessible through

Solution Advisor. However, they are still accessible using the solution ID prompt in the resolution region of the Case page.

Expired: The solution is no longer valid as of the expired or superseded date.

Superseded: The solution is no longer valid because another solution has replaced it.

Include in F.A.Q. (include in frequently asked questions)

Selecting this check box makes the solution available on the FAQ tab on the agent facing Case page. It is not used in the self-service FAQ functionality. The self-service FAQ set up is discussed in the section on secondary libraries.

See [Chapter 3, “Managing Solutions,” Identifying Secondary Solution Libraries , page 20.](#)

Visibility

Select *All* if self-service users are allowed to view this solution. Select *Internal* to prevent self-service users from using this solution.

Summary

This page has both a link and an enterable field called Summary. To view the Solution Summary page, click the link. Use the enterable field to enter a short description of the solution.

Superseded By

When the solution status is *Superseded*, identify the replacement solution in this field.

Selecting a replacement solution automatically sets the status to *Superseded*. Selecting a status other than *Superseded* clears the Superseded By field.

When you merge solutions using the Merge Similar Solutions page, the system sets the status to Superseded and identifies the replacement solution automatically.

Expired or Superseded Date

Enter the date the status was set to either *Expired* or *Superseded*.

As delivered, the search index templates for solutions exclude solutions with an expired or superseded date after the collection build date. Therefore, these solutions are not accessible through Solution Advisor. However, they are still accessible using the solution ID prompt in the resolution region of the Case page.

Keywords

Enter search keywords or a phrase for the solution.

Symptoms

Enter a description of the problem that the solution addresses.

Details

Enter the full explanation of how to solve the problem.

See Also

[Chapter 2, “Setting Up Solution Management,” page 7](#)

Tracking Notes and Attachments

Access the Solution - Notes page.

The Solution - Notes page uses the standard PeopleSoft CRM interface for working with notes and attachments.

Attachments are visible on solution summary pages, including self-service pages. Therefore, you would normally want all attachments (especially those with visibility of *All*) to be files that a caller uses when applying the solution: for example, DLL files or BAT files that fix software problems.

See Also

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

Identifying Secondary Solution Libraries

Access the Solution - Libraries page.

Solution

Save Refresh Personalize

Solution ID 301028 **Usage Count** 0
Summary Modem Dials But No Answer **Solved Count** 0

Solution Notes **Libraries** Case Related Actions Service Order Related Actions History

Solution Library Defaults

Include	Library Name	Description
<input type="checkbox"/>	Accounts and Billing	
<input type="checkbox"/>	---- Choose an FAQ Topic ----	
<input type="checkbox"/>	General Questions	
<input checked="" type="checkbox"/>	Network Performance	
<input type="checkbox"/>	Product Issues	
<input type="checkbox"/>	Self-Service Troubleshooting	
<input type="checkbox"/>	User Training	

Solution - Libraries page

Libraries are only applicable to call center applications.

Solution Library Defaults

If the primary library, which appears on the Solution page, is associated with any secondary libraries, those secondary libraries are listed in this grid. If *FAQ* appears, then the solution's primary library (and therefore the solution, if its visibility is set to *All*) is visible to customers in the self-service Frequently Accessed Questions page.

Select secondary libraries to associate with the current solution.

Secondary library association do not affect searching or the availability of the solution as a FAQ. The only reason to give solutions secondary associations with libraries is if your organization designs administrative processes or reports based on secondary associations.

See Also

PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook, “Configuring Self-Service Applications”

PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook, “Working with Self-Service Application Transactions”

Managing Relationships with Cases, Products, Errors, and Other Solutions

Access the Solution - Case Related Actions page.

Solution

Save

Refresh

Personalize

Solution ID

301028

Usage Count

0

Summary

Modem Dials But No Answer

Solved Count

0

Solution

Notes

Libraries

Case Related Actions

Service Order Related Actions

History

Related Solutions

Related Cases

Related Products

Related Errors

Related Category/Type/Detail

Related Solutions

Relationship Type	Solution	Solution Summary	Link Source	Datetime Added	Delete
Similar	301022	Busy signal when dialing long distance	MAN	05/24/2004 4:04PM	<div>Delete</div>

Relate an Existing Solution

Solution - Case Related Actions page

Click the links at the top of the page to see different types of related actions in the grid.

Related Solutions

This grid lists all solutions that are related to the current solution. You can add rows of data manually or create solution relationships by running the Related Solution process. This information appears for each related solution:

- The relationship type.
- The solution ID and summary.
Click the solution ID to view the solution summary.
- The link source: MAN (manually created) or SYS (system-created).
- The date and time the relationship was created.

Click the Relate an Existing Solution button to access the Relate Existing Solutions page. Use this page to establish a relationship between this solution and another one.

Related Cases

Case relationships are relevant only for call center applications. When you resolve a case, the system adds the newly resolved case to the solution's list of related cases.

This grid lists all cases to which the solution has been applied, regardless of whether the solution solved the case. The system maintains the list of related cases in realtime.

This information appears for each related case:

- The case ID and summary.
Click the case ID to transfer to the case.
- A resolution status that indicates whether the solution resolved the case.

Related Products

This grid lists all products for cases that the solution successfully resolved. You can add rows of data manually or use the Update Solution Usage Counts process to create additional relationships automatically.

This information appears for each related product:

- The product ID and description.
- A solved count that indicates the number of cases with this product that the solution resolved.
- The link source: MAN (manually created) or SYS (system-created).
- The date and time the relationship was created.

Related Errors

Errors are relevant only to call center applications. This grid lists all errors for cases that the solution successfully resolved. You cannot add rows of data manually; you must use the Update Solution Usage Counts process to create additional relationships.

This information appears for each related error:

- The error ID and error message.
- A solved count that indicates the number of cases with this error that the solution resolved.
- The link source: MAN (manually created) or SYS (system-created).

Currently, you cannot create manual relationships.

Related Category/Type/Detail

Categories, specialty types, and details are relevant only for call center applications. This grid lists all categories, types, and details for cases that the solution successfully resolved. You can change the specialty types and details listed for the category by selecting new values from the drop-down list boxes for the two fields.

This information appears for each related category/type/detail:

- The category, specialty type, and detail.
- A solved count that indicates the number of cases with this category/type/detail combination that the solution resolved.
- The link source: MAN (manually created) or SYS (system-created).

Currently, you cannot create manual relationships.

See Also

[Chapter 3, “Managing Solutions,” Relating Solutions Automatically, page 25](#)

[Chapter 3, “Managing Solutions,” Updating Solution Usage Counts and Linkages, page 26](#)

[Chapter 4, “Using Solutions,” Understanding Case, Service Order, and Defect Resolution, page 35](#)

Managing Relationships with Service Orders, Products, and Other Solutions

Access the Solution - Service Order Related Actions page.

Solution

Save Refresh

Personalize

Solution ID 301028

Usage Count 0

Summary Modern Dials But No Answer

Solved Count 0

Solution

Notes

Libraries

Case Related Actions

Service Order Related Actions

History

Related Solutions

Related Service Orders

Related Products

Related Solutions

Customize Find

First 1-2 of 2 Last

Relationship Name	Solution	Solution Summary	Link Source	Datetime Added	Delete
Similar	301030	Green Light Blinking but cannot connect to internet.	MAN	05/24/2004 4:29PM	Delete
Similar	301022	Busy signal when dialing long distance	MAN	05/24/2004 4:04PM	Delete

Relate an Existing Solution

Solution - Service Order Related Actions page

Click the links at the top of the page to see different types of related actions in the grid.

Related Solutions

This grid lists all solutions that are related to the current solution. You can add rows of data manually or create solution relationships by running the Related Solution process. This information appears for each related solution:

- The relationship name.
- The solution ID and summary.
Click the solution ID to view the solution summary.
- The link source: MAN (manually created) or SYS (system-created).
- The date and time that the relationship was added.

Click the Relate an Existing Solution button to access the Relate Existing Solutions page, where you can establish a relationship between this solution and another one.

Related Service Orders

Service order relationships are relevant only for field service applications. When you resolve a service order, the system adds the newly resolved service order to the solution's list of related service orders.

This grid lists all service orders to which the solution has been applied, regardless of whether the solution solved the problem. The system maintains the list of related service orders in realtime.

This information appears for each related service order:

- The service order and description.
Click the service order link to transfer to the service order.
- A resolution status that indicates whether the solution resolved the problem.

Related Products

This grid lists all products for service orders that the solution successfully resolved. You can add rows of data manually or use the Update Solution Usage Counts process to create additional relationships automatically.

This information appears for each related product:

- The product ID and description.
- A solved count that indicates the number of cases with this product that the solution resolved.
- The link source: MAN (manually created) or SYS (system-created).
- The date and time that the relationship was added.

Relating Solutions

Access the Relate Existing Solution page.

Relate Existing Solution page

Solution ID Select the solution to relate to the current solution.

Solution Relationship Type Select from the values established on the Solution Relationship Type page.

OK Click this button to establish the relationship and return to the Solution - Related Actions page.

See Also

[Chapter 2, “Setting Up Solution Management,” Defining Solution Relationship Types, page 10](#)

Viewing Solution History

Access the Solution - History page.

Solution - History page

Policy Name Displays the name of the policy that caused the history item to be logged. This information is usually recorded after the solution is saved.

Note. The components present in Active Analytics Framework (AAF) are used to build policies. The information that appears on this page is triggered after the solution is saved.

Action Taken Displays the name of the event. The description of the action comes from the description of the event established in the Event Definition page used to set up active analytics framework.

Changed By The person who made the change that triggered the event.

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Delivered Active Analytics Framework System Data for PeopleSoft CRM Applications”

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Working with Active Analytics Framework,” Configuring Actions in Policies

Relating Solutions Automatically

Create solution relationships automatically by running the Related Solutions process.

Page Used to Relate Solutions Automatically

Page Name	Object Name	Navigation	Usage
Update Related Solutions	RC_REL_SOL_RUN	Solutions, Update Related Solutions, Update Related Solutions	Run the Related Solutions (RC_RELA_SOL) process, which loops through every solution in the system. For each iteration of the search, the system creates relationships of type <i>Similar</i> between the base solution and similar solutions.

Creating Solution Relationships

Access the Update Related Solutions page.

Update Related Solutions page

- Score** Enter a score. When the system searches for similar solutions, solutions with a relevance score at or above the level that you specify here are considered a match.
- Rows to return** Enter the maximum number of solutions returned by the search process, and therefore the maximum number of solutions that will be related to the base solution.
- All** Select to search all solutions.
- From and Through Date** Select From and enter from and through dates to limit search results to solutions created during the specified date range.

See Also

Using PeopleSoft Applications PeopleBook

PeopleSoft Process Scheduler PeopleBook

Updating Solution Usage Counts and Linkages

Update usage counts using the Update Solution Usage Counts process.

Page Used to Update Solution Usage Counts and Linkages

Page Name	Object Name	Navigation	Usage
Update Solution Usage Counts	RC_SOLN_RUN_CNTL	Solutions, Update Solution Usage Counts, Update Solution Usage Counts	Run the RC_SOLN_USAG Application Engine process, which updates the solved count, usage count, and usage count by product for all solutions in the database.

Updating Usage Counts

Access the Update Solution Usage Counts page.

Update Solution Usage Counts

Run Control ID: UPD_SOL_USG_CNT_3 [Report Manager](#) [Process Monitor](#)

Update Solution Attributes

Solution Usage Counts: ☒ Solution Usage Counts ☒ Update Product Search Table

Create Solution Linkages: ☒ Solution Usage by Product ☒ Solution Usage by Error ☒ Update Solution Usage by C/T/D

Effected Dates: ☒ All ☐ From Through (Example: 12/31/2000)

Update Solution Usage Counts page

Running this process updates the usage counts that you select. It also updates the solution status to *Expired* for solutions that have had an expiration date in the past.

Solution Usage Counts

Solution Usage Counts	Select to update usage counts and the solved counts.
Solution Usage by Product	Select to update solution counts by product. The process does not affect existing product relationships where the link source is MAN.
Solution Usage by Error	Select to update solution counts by error message. The process does not affect existing error relationships where the link source is MAN.
Update Solution Usage by C/T/D (update solution usage count by category/type/detail)	Select to update solution counts by category, specialty type, and detail.

Create Solution Linkages

Link Solution Products	Select to update the related products list for all solutions. The system creates relationships between cases and the products in the cases that the solution solved.
Solution Error Link	Select to update the related errors list for all solutions. The system creates relationships between cases and the errors in the cases that the solution solved.
Solution Cat/Typ/Det Link (solution category/type/detail link)	<p>Select to update the related categories, types, and details lists for all solutions. The system creates relationships between cases and the category/type/details combination in the cases that the solution solved.</p> <p>Category/type/details counts are based on unique combinations of all three fields.</p>

Effected Dates

These fields affect solution usage counts, not solution linkages.

All	Select to count every use of the solution.
From and Through	Select to count solution usage during a particular date range. If you select this option, specify the date range.

See Also

Using PeopleSoft Applications PeopleBook

PeopleSoft Process Scheduler PeopleBook

Merging Similar Solutions

This section discusses how to:

- Search for similar solutions.
- Select solutions to merge.
- Perform the merge.
- Search for solutions.

Pages Used to Merge Similar Solutions

Page Name	Object Name	Navigation	Usage
Merge Similar Solutions	RC_FIND_SIMLR_SOLN	Solutions, Merge Similar Solutions, Merge Similar Solutions	Search for solutions similar to a solution that you identify.
Merge Similar Solutions - Search Results	RC_FIND_SSOLN_RSLT	Click the Search Similar Solutions button on the Merge Similar Solutions page.	Review search results and select solutions to merge.
Merge Similar Solutions - Select Master Solution	RC_FND_SELECTMASTR	Click the Merge Solutions button on the Merge Similar Solutions - Search Results page.	Select a solution to use as the master solution and complete the merge.
Solutions Search	RB_SOLUTION_SEARCH	Solutions, Solutions Search, Solutions Search, Advanced Search	Search for solutions based on the content of an existing solution.

Searching for Similar Solutions

Access the Merge Similar Solutions page.

Merge Similar Solutions page

SetID	Select the setID of the solutions to be merged.
Solution ID	Select the solution that you want to use to search for similar solutions.
Include Solution Description	Select to search for similar solutions based on the description of the solution that you've identified. The system searches all the fields in the search collection.
Include Symptoms	Select to search for similar solutions based on the symptoms that you entered in the Solution Summary page for the solution that you've identified. The system searches all the fields in the search collection.
Search Similar Solutions	Click to initiate the search for similar solutions. Results appear on the Merge Similar Solutions - Search Results page.

See Also

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

Selecting Solutions to Merge

Access the Merge Similar Solutions - Search Results page.

Merge Similar Solutions

Search Results

SetID COM01 Solution ID 100003

Customize | Find | View All |

First 1-7 of 7 Last

Select	Score	Solution ID	Summary	Added By	Date Added
<input type="checkbox"/>	80%	100003	Connections get dropped while driving.	Allen,Edward	12/14/2001 5:49AM
<input type="checkbox"/>	11%	301019	Call Forwarding Issues	Allen,Edward	01/28/2002 1:04PM
<input type="checkbox"/>	5%	301006	Adding additional representatives to an existing account.	Allen,Edward	12/14/2001 7:15PM
<input type="checkbox"/>	5%	301022	Busy signal when dialing long distance	Allen,Edward	01/28/2002 1:06PM
<input type="checkbox"/>	5%	301026	Network Connection down	Allen,Edward	01/28/2002 1:08PM
<input type="checkbox"/>	5%	301027	Reboot DSL Modem to resolve light status	Allen,Edward	01/28/2002 1:08PM
<input type="checkbox"/>	5%	301292	What is the difference between Bridging and PPP (Point-to-Point)?	Allen,Edward	10/28/2002 4:27PM

☒ Select All ☐ Clear All

Merge Solutions [Return To Search](#)

Merge Similar Solutions - Search Results page

- Select** Select to identify the solutions to merge. Use the Select All and Clear All links as data entry shortcuts.
- Score** Displays the relevance score calculated by Verity, which indicates how closely the solution matches the solution that you started with.
- Merge Solutions** After you've selected the solutions to be merged, click to continue the merging process. The selected solutions appear on the Merge Similar Solutions - Select Master Solution page, where you can select one solution as the master solution and complete the merge.
- Return to Search** Click to return to the Merge Similar Solutions page.

Performing the Merge

Access the Merge Similar Solutions - Select Master Solution page.

Merge Similar Solutions

Select Master Solution

Customize | Find | View All |
First 1-2 of 2 Last

Select	Score	Solution ID	Summary	Added By	Date Added
<input checked="" type="checkbox"/>	80%	100003	Connections get dropped while driving.	Allen,Edward	12/14/2001 5:49AM
<input type="checkbox"/>	5%	301026	Network Connection down	Allen,Edward	01/28/2002 1:08PM

Use Selected As Master
Create New Solution
[Return To Search](#)

Merge Similar Solutions - Select Master Solution page

The column headings on this page are identical to those on the Merge Similar Solutions - Search Results page.

Select one of the solutions listed before you click one of these page elements:

Use Selected as Master

Click to merge the solutions using the selected solution as the master solution. Attachments and products associated with the expired solutions are added to the master solution.

Create New Solution

Click to clone the selected solution and merge the solutions using the newly created solution as the master solution. Attachments and products associated with the expired solutions are added to the new master solution.

Return to Search

Click to return to the Merge Similar Solutions page without merging solutions.

When you merge solutions, all solutions other than the new master solution (either the selected solution or its clone) expire as of the date that you perform the merge. Each expired solution identifies the new master as the superseding solution, including the selected solution, if you cloned it to create the new master.

Searching for Solutions

Access the Solutions Search page.

Solutions Search

Search Criteria

With all the Words

With the Exact Phrase

With any of the Words

map network printer

Without the Words

Use Word Variations

Rows to Display

50 rows

[Basic Search](#)

[Search Tips](#)

[Preferences](#)

[Hide Search Options](#)

Search Domains

☒ **Solution with Products Fields**

☒ Datetime Added
☒ Last Maintained By
☒ Solution Description

☒ Added By
☒ SetID
☒ Solution ID

☒ Last Modified
☒ Solution Status
☒ Solution Summary

Rows to Display

50 rows

[Basic Search](#)

[Hide Search Options](#)

[Search Tips](#)

[Preferences](#)

Solutions Search page (1 of 2)

Search Results			
		Customize Find	First <input type="text" value="1-50 of 50"/> Last
Score	Solution ID	Summary	Library
80.0%	301120	How to Map a Network Printer In the Start Menu go to Start>Settings>Printers Double click the Add Printer button to launch the Add Printer Wizard. Selec...	Network Related
78.00%	75	Map Network Printer Map the network Printer	CRM2
66.00%	72	Testing the Self-test verification for ITN Printers 1. Verify that the printer can print a self-test page (print a self-test page from the printer's control panel). 2. If the s...	CRM2

Solutions Search page (2 of 2)

Search Criteria

Use the fields in this group box to enter information about the solution for which you are searching.

Note. For information on the way that the system uses the various fields in this section for solution searching, click the Search Tips link. To display the page to match your personal preference, click the Preferences link.

Use Word Variations

Select either *Alternate spellings* or *Include Synonyms* to indicate to the system that you want it to also look for solutions based on different spellings or words that are similar to the ones that you entered.

Rows to Display

Select the number of rows that you want the system to display after you click Search.

More Search Options

Click this link to display a list of check boxes that you can select to search by date and time added, last maintained by, solution description, added by, setID, solution ID, last modified, solution status, and solution summary.

Search Domains

Select the fields that you want the system to use to search for solutions. Before you click Search, however, you must enter the criteria by which you want the system search for the solution in the Search Criteria section at the top of the page.

For example, if you know the ID of the solution for which you were searching, you could enter it in one of the fields in the Search Criteria section and then select the Solution ID check box and click Search to locate the solution.

Or, if you know the date that the solution was last modified, you could enter the date in one of the Search Criteria fields, select the Last Modified check box and then click Search to find the solution.

Search Results**Summary**

Click the link under the summary field to go to the Solution page, where you can view the specifics of the solution, including usage counts, solved counts, date created, and so on.

CHAPTER 4

Using Solutions

This chapter provides an overview of case, service order, and defect resolution and discusses how to find and attempt solutions

Note. PeopleSoft's email response management system (ERMS) and many of its self-service applications also use solutions.

Understanding Case, Service Order, and Defect Resolution

PeopleSoft Support, HelpDesk, HelpDesk for Human Resources, Quality Management and Integrated FieldService applications enable you to track both the final solution (the one that resolved the caller's problem) and other solutions that were considered. By tracking all solution usage, you capture valuable information about the effectiveness of the solution set.

This section discusses:

- Resolved cases, service orders, and defects.
- Allowing multiple resolutions to resolve a case, service order, or defect
- Attempted solutions.

Resolved Cases, Service Orders and Defects

Solutions describe the ways you might be able to resolve the caller's problem. A solution can succeed or fail. When a solution resolves a case, service order, or defect, it is considered a resolution. Resolutions exist in the context of a case, service order, defect, or email only.

A resolved case is a case that's associated with a successful solution. A resolved case is not necessarily a closed case; the case status is independent of the solution status. You can use the Case Defaults page to set up a default status for resolved cases. If a default status exists, the system changes the status when you resolve the case.

Note. If no default exists, an agent must update the status manually. You can, however, close a case without a successful solution. You can do this if you have a solvable action that is related on the case; so a successful resolution isn't the only way to close a case.

On a service order the field service technician can record repair actions they have attempted and identify the actions that were successful. The system feeds the successful actions data to the solution database, so that a technician's repair actions become available to other technicians. The result of these solutions when added to the solution database is that new, more efficient and effective solutions become available to the entire work force

In PeopleSoft Quality Management, a technician can select a fix ID or search for and add a solution to indicate what they have done to resolve the customer's problem.

See Also

PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook, “Defining Call Center Business Units and Display Template Options”

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, “Defining Business Units in PeopleSoft Integrated FieldService”

Allowing Multiple Resolutions to Resolve a Case, Service Order, or Defect

You can use more than one solution to resolve a case, service order, or defect. If you use multiple solutions, more than one can have the status of successful.

To allow more than one successful resolution, you must configure it on the Business Unit setup pages for the applications you are implementing. For PeopleSoft FieldService, however, you do not need to configure the system to allow multiple resolutions.

Since you set up the system to close the case automatically when a solution is successful, PeopleSoft has made these modifications to this process:

- The automatic closing of the case on the solution status field is a save event.
This enables the user to change the status on more than one resolution before the case, service order, or defect is closed.
- The status field is editable even when the case is closed if the status is *In Consideration* or *Failed*, so the agent, technician, or manager can identify other solutions as successful. The system makes any resolution with the status of *Successful* read only

Note. This is only applicable when cases are configured to allow multiple resolutions; otherwise, the system makes all the statuses read only after the case is closed

Attempted Solutions

This section discusses:

- Potential solutions.
- Methods for finding solutions.
- Resolution statuses.
- Resolution process.
- Managing attempted solutions.

Attempted Solution Grids

The Case page includes a Solutions Considered for this Case grid that lists all of the solutions that you’ve identified as potential solutions.

Case Solution Summary Notes Case History Related Cases Related Actions						
Solutions Considered for this Case						
Customize Find View All First 1-2 of 2 Last						
Select	ID	Description	Date Modified	Added By	*Status	
<input type="checkbox"/>	27	Steps to fix ice cubes taste bad and smell in... Because ice has a tendency to pick up odors easily, you should clean your ice bin regularl...	05/24/2004 7:07:21PM PDT	Smith,Robert	In Consideration	
<input type="checkbox"/>	22	How to fix if the refrigerator runs too long?... Before making a service appointment, answer these questions: ...	04/11/2001 3:28:32PM PDT		In Consideration	
L Email View Solve						

Solutions Considered for this Case grid

The Service Order page includes an Attempted Solutions grid that lists the solutions that may resolve the service order. The grid includes a relevance score for how well the solution matches the ability to solve the problem or complete the service, a description of the solution, and a link to the Solution Summary page.

The Quality Management page includes a Solutions Considered for this Defect grid that lists the solutions, solution IDs, date modified and status of all solutions that may resolve the defect or implement the enhancement.

Methods for Finding Solutions

There are five ways to find and attempt potential solutions in the Attempted Solutions grid on the Solutions page for cases.

For service orders there are three ways to find and attempt potential solutions using the Attempted Solutions grid on the Solutions page.

For quality management there are two ways to find and attempt potential solutions using the Solutions Considered for this Defect grid on the Solutions page.

Note. When searching for solutions, expired solution do not show up in search result. When you expire a resolution, the user needs to create a new search collection instead of updating it to hide it from the search result.

This table describes the methods that are used to find and attempt solutions:

Page	Tab	Description
Solution	Suggested Solution Used for cases, service orders, and quality management.	Select the solutions that will most likely resolve the problem and then click the Attempt button. The system adds the selected solutions into the Solutions Considered grid. From this tab you can choose to use the basic, advanced, or more search options modes when searching for solutions.

Page	Tab	Description
Solution	Search Used for cases, service orders, and quality management.	Enter text to search for solutions that might relate to the case and then click the Search button. Select the solutions that are most likely to resolve the problem and then click the Attempt button. The system adds the selected solutions into the Solutions Considered grid.
Solution	FAQ Used for cases only.	Select the library of frequently asked questions that are most likely to resolve the problem associated with the case. The system displays a list of solutions. Select a solution and then click the Attempt button. The system adds the selected solutions to the Solutions Considered grid.
Solution	Frequently Used Solution Used for cases only.	Select the type of solutions that are most likely to resolve the problem associated with the case. The system displays a list of solutions. Select a solution and then click the Attempt button. The system adds the selected solutions to the Solutions Considered grid.
Solution	Enter New Solution Used for both cases and service orders.	Enter text that describes the solution that you used to resolve the problem. Click the Attempt button. The system adds the selected solutions into the Solutions Considered grid.

Resolution Statuses

Each solution attempt is associated with one of these statuses:

- *In Consideration*

You have not suggested this solution. The solution is in the list and is available when you're ready to try it.

- *Waiting on Customer*

You have suggested this solution, but you don't know whether the solution worked.

- *Failed Resolution*

The caller or technician attempted the solution, but the solution did not solve the problem.

- *Successful Resolution*

The solution solved the problem. This status can only be associated with one solution in a case, or defect. Service orders allow more than one successful resolution. When you select this status for a solution, the Case, Service Order, or Quality Management page prevents you from considering additional solutions or updating the status of other solutions.

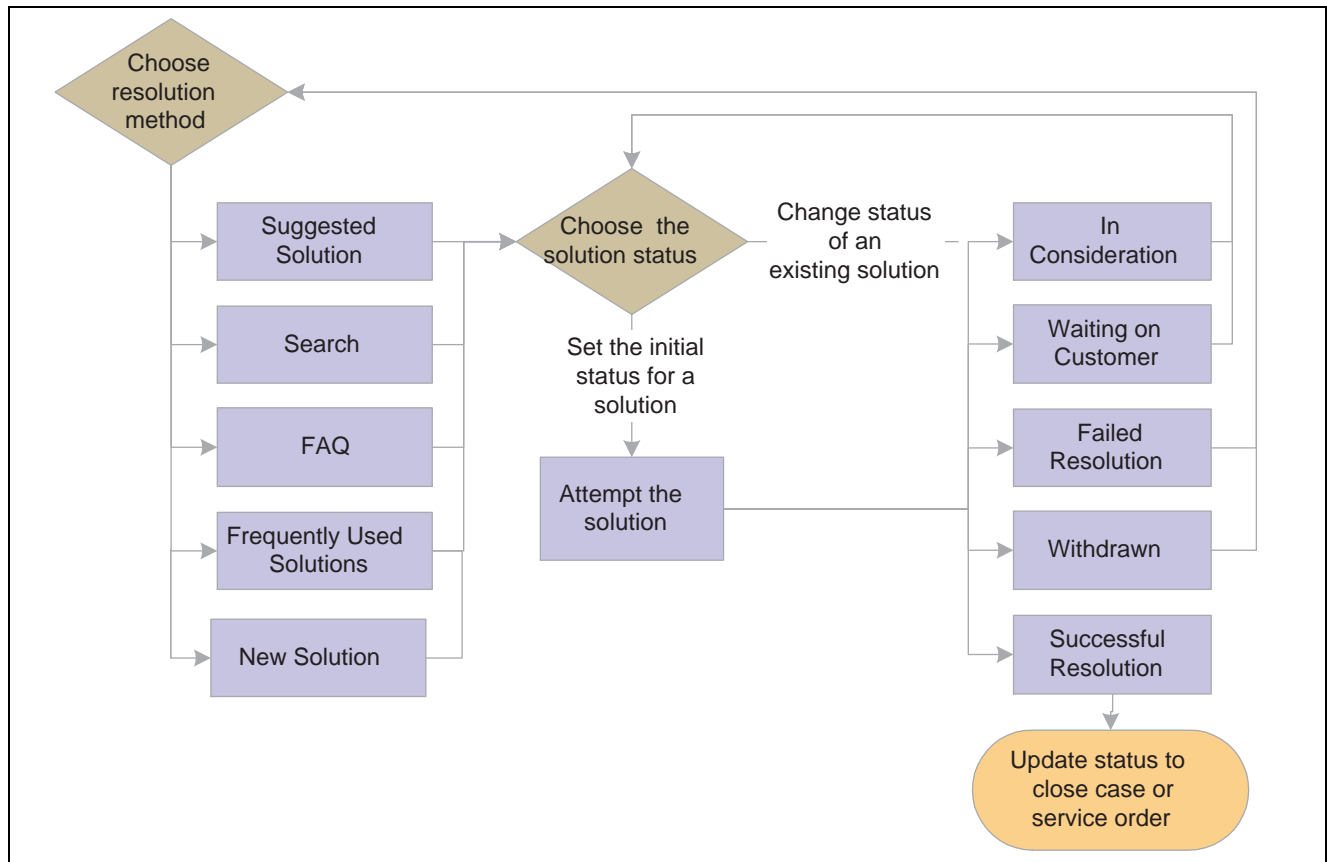
Note. Successful statuses can be applied to multiple solutions based on the way the business unit is set up. When a case is closed and multiple solutions are required, users can select other non-successful solutions as successful. When the case is reopened, however, successful resolutions are changed to failed resolutions.

- *Withdrawn*

The solution should not have been associated with the case, service order, or defect and is to be disregarded in all solution-related metrics. Selecting *Withdrawn* does not remove the solution entirely. It informs the system that it shouldn't have been there in the first place. *Withdrawn* solutions are ignored in solution usage statistics and are not visible through self-service.

Resolution Process

This graphic illustrates the resolution process for cases. For PeopleSoft FieldService successful resolutions do not change the status of the service order.



Case resolution process flow

There are other methods of attempting a solution from a page other than the Case or Service Order page. You can launch a troubleshooting guide (a type of script) directly from the solution search grid or the Related Actions page. Or, if the case is a child of another case, you can set up active analytics frameworks (AAF) to cascade the successful resolution from the parent to the child.

Note. This is not applicable to service orders.

Managing Attempted Solutions

Once you've added solutions to the Attempted Solutions grid for the case, service order, or defect, you can do one of three things with the solutions:

- Update the solution status.
- View the solution details.

The Solutions grids show summary information about each solution. Click the summary text to display the Solution Details page. On the Solution Details page, you can see the full text of the solution, and you can add notes or attachments to the solution.

- Email the solution.

Often the most efficient way to communicate a solution to a caller, manager, or technician is to send an email with the solution text. Attachments are not included in the email.

- Solve the case, service order, or defect by selecting the solution and then click the Solve button. This changes the status to *Successful Resolution*.
- View the text of the solution by selecting the solution and then click the View button.

- Click the Add a New Note button to the right of the solution description to add notes to the solution.

Note. PeopleSoft Quality users can view solution details only. They cannot update solution statuses. They also cannot add resolution notes or attachments from the Solution Details page.

See Also

PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook, “Processing Cases,” Managing Related Actions

Chapter 2, “Setting Up Solution Management,” page 7

Chapter 3, “Managing Solutions,” page 13

Finding and Attempting Solutions

This section provides an overview on solutions and discusses how to:

- Use suggested solutions.
- Search for solutions.
- Use FAQs to search for solutions.
- Use frequently used solutions.
- Enter new solutions.
- Email solutions.
- Review details of attempted solutions.
- View external content solutions.
- Add resolution notes and attachments.

Understanding Solutions

This section discusses:

- Suggested solutions.
- Solution advisor searches.
- FAQs.
- Frequently used solutions.
- New solution creation.
- External content and Verity searching.
- How external content works.

Suggested Solutions

The Suggested Solutions tab is only available to customers who also purchase Banter, a third-party product. Banter’s Natural Language Process (NLP) engine is used to suggest which solutions may solve the problem related to the case, service order, or defects.

When you select the Suggested Solutions tab, the system calls the NLP engine and passes input parameters resulting in the NLP engine returning a list of suggested solutions:

When a solution is identified as successful or failed, the system sends the information to NLP so that the NLP engine can learn which solutions are successful and which ones fail. This information is sent to NLP. Every time the user accesses the Suggested Solutions page, the NLP search automatically runs to take advantage of any changes that would affect the solutions suggested.

Solutions

Suggested Solutions Search New Solution

Your search returned 3 result(s).

Select	Score	ID	Description
<input type="checkbox"/>	93	20	Steps to measure refrigerators. Use a string to measure each dimension of your current refrigerator. Then take the string and line it up with a ruler. This should give you the correc... More like this...
<input type="checkbox"/>	7	18	Cleaning the condenser coil of the Refrigerator? The coil can be cleaned using a long brush (available at most hardware stores) or a vacuum cleaner. Gently nudge the brush under the unit to pull out ... More like this...
<input type="checkbox"/>	4	19	Steps to cut refrigerator's energy costs. The easiest way to trim your energy bill is to replace an older model with a newer one. By replacing a 15-year-old top-mount refrigerator with a new m... More like this...

Keywords

[Advanced Search](#)
[Search Tips](#)
[Preferences](#)
[Create New Solution](#)

Suggested Solutions tab

The Suggested Solutions tab also displays the Verity basic search fields under the results grid. This is available so that if none of the suggested solutions apply, a user can search on a text string that they enter. When the user clicks the Search button, the Verity basic search runs and the user accesses the Search tab, where the system displays the search results.

You can also use the search functionality to search by solution ID. The user can enter the solution ID in the Keyword field and click search. The solutions appear in the results grid. If the customer has not purchased NLP, then the Suggested Solutions functionality is not available. The default tab delivered out of the box is the Search tab. (If NLP does not return any results, then the user is automatically directed to the Search tab).

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, "Setting Up Natural Language Processing".

Solution Searches

The Solution page has three search modes: basic, advanced, and more search options:

- **Basic Search:**

This is a Verity that looks at all objects in the search collection. The system ranks the search results by percentage according to how close the match is. It contains these characteristics:

- Basic search is the default when the user selects the tab, unless the user has changed his preferences.

- The value in the Search field automatically changes to the problem summary value if it is not set yet. Click the Search button to launch a Verity search against all domains in the search collection. Domains can include solutions, cases, fixes, defects, troubleshooting guides, internet sites, intranet sites and file servers.

Note. Click the Search button to launch a Verity search against all the domains that are defined in the user's preferences. There is additional logic that the system uses to display the search text on the Case page. The system first tries to pull information from the quick code, then from the previous search (the saved search), and then the problem summary.

- When the system performs a search, the text is stored as a keywords that the next time the user opens the page, the previously used search text is automatically entered.
- The system displays a message listing common or stop words that were not included in the search (examples are *the*, *a*, *and*, *or* and so on) above the search results, if they were set as a configuration option at the component level during implementation.
- Advanced Search

Includes a series of text boxes used to perform a natural language internet-type search. Advance search gives you the ability to perform these types of searches:

- With all the Words: Works like a logical AND. All of the words must be in the text for which you are searching
- With the Exact Phrase: The exact phrase must appear in the text for which you are searching.
- With any of the Words: Works like a logical OR. If any of the words in the search text appear, the system returns results.
- Without the Words: None of the search text entered can appear in the text for which you are searching.
- Rows to Display: Controls the number of rows in the search results grid.
- Use Word Variations: Select one of the options to expand the search using different spellings of words or synonyms.

Note. These are additional search options available, but they are delivered as hidden out of the box: *Words in a Sentence* and *Words in a Paragraph*. You can enable or disabled these options through user preferences options.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, "Setting Up Search Collections," Configuring Search Options.

FAQs

The FAQ tab displays a predefined list of solutions that the agent can choose from to resolve the case. If the FAQ check box is selected during implementation on the solution setup page, then the solution qualifies as an FAQ.

The View by Type field contains a list of libraries with associated solutions that have been identified as FAQ.

The results grid displays a list of the solutions that have been set up for the library selected. FAQs are sorted by the date and time that they were last modified on the solution so that the user sees the most up-to-date solutions first.

Note. This feature is only used for PeopleSoft call center applications (PeopleSoft HelpDesk, Support, and HelpDesk for Human Resources).

Frequently Used Solutions

The Frequently Used Solution tab lists frequently used solutions by type: either *All*, *Category/Type/Detail*, *Error*, or *Product*.

Solutions are sorted based on their solved counts. For example, the solution that solved the most cases for the product on the current case would be first, and so on. This tab must be turned on when you are configuring the system during implementation.

Note. This feature is only used in PeopleSoft call center applications (PeopleSoft HelpDesk, Support and HelpDesk for Human Resources, and verticals).

New Solution Creation

If a user is unable to locate an existing solution, they can use the New Solution tab to enter a new solution. When the user enters a new solution and clicks the Attempt button, the system inserts the solution into the Attempted Solutions grid with the status of *In Consideration*. If they click the Solve button, the system inserts the solution in the grid with the status of *Successful*.

Note. The Attempt and Solve button are visible and applicable on all sections and tabs on the Solutions page, not just new solutions. This feature is not used in PeopleSoft Quality Management.

External Content and Verity Searching

Included in the Verity search options is external content searching using the intranet, internet and file servers. The system includes external link matches in the Verity search results, if you have enabled it during your implementation.

When external content solutions appear in the search results grid, the description includes a link that opens the external content in a new window. If the external content is a file, it opens in the appropriate application. The user can turn external search on or off by selecting or clearing the external content domain on the Advanced Search - More Search Options page.

When a user selects multiple items from the searching grid, it transfers the user to the Solution Detail page. If external content is selected, it displays as a link with a description. Users can navigate into the solution to see the details or click Attempt or Solve to solve the case, service order, or defect

How External Content Works

Whenever a technician or agent uses external content to resolve a service order or case, the system creates a solution type of *Link* or *File* in the background to represent it. The next time an external content search is used and the same content is found and used, the system checks to see whether a solution already exists for it and uses the existing solution by matching the URL or FILE path in summary.

Here's how it works:

1. Verity indexes HTTP files and documents (Word docs, text files, PDF files, and so on) in addition to regular solutions in the database.

For example you can index PeopleSoft Planet Intranet and do keyword searches on those files.

2. When you search on external content (HTTP or File) and then click an item in the results set, the system opens a new browser with the actual external content using the URL in your browser; so if you index something on the Planet PeopleSoft website, it opens the page on the website; or it will open the actual PDF or Word document.
3. When you attempt one of the solutions using external content, the system create a solution behind the scenes and then attempts the solution to the case

4. When you attempt one of external content solutions, the system looks in the database to see if the external content has already been created as a solution.

It does this by comparing the URL of the external content to the existing solutions that were created from external content. If it has already been created, it uses the existing solution and attempts it. If it is the first time that user has attempted the external content solution and there is no existing solution for it, it creates a new solution and attempts it.

5. When you open an attempted solution that has external content on the attempted solutions grid, it opens the solution.

The system does not open the actual external content. This is different than step 2 where, if you click the external content solution from the search results grid, it opens the actual external content. In this case, it opens the solutions and displays a link with the URL. If you click the URL, the system opens the actual external content.

Common Elements Used in This Section

Select	Select the check box next to the solution that you want to either attempt, use as a solution, or view and then click the appropriate button that corresponds to the action that you want to take.
Attempt	Click this button to attempt the solution that you selected. The system adds the solution to the Solutions Considered grid for the service order, case or defect with the status of <i>In Consideration</i> .
Solve	Click this button to use the solution that you selected to resolve the issue. The system adds the solution to the Solutions Considered grid for the service order, case or defect with the status of <i>Successful Resolution</i> .
View	Click this button to view the solution that you selected. The system displays the Solution Details page.
Search	Click to search for solutions that match the search criteria or text that you entered.

Pages Used to Find and Attempt Solutions

Page Name	Object Name	Navigation	Usage
Solutions	RF_SO_SOLN (Service Order), RC_CASE_SOLN (Case), RQ_DEFECT_SOL_LNK2 (Defects)	<ul style="list-style-type: none"> Support, Create a Case, Solutions HelpDesk, Create a Case, Solutions FieldService, Create a Service Order, Solutions Quality Management, Create a Defect, Solutions 	Find and attempt solutions to resolve cases, service orders, and defects.
Outbound Email	RB_EM_OB_ADD	Select a solution from the Solutions Considered grid and then click the Email button.	Email solution information to customers or contacts.
Resolution Details	RC_CASE_SOL_SUM (Case), RF_SO_SOL_SUM (Service Order), RQ_DFCT_SOL_SUM (Defects)	Click a solution summary on the Case page, Service Order page or Quality Management page.	Review details of attempted solutions.
Solutions	RC_SOLN_SUMMARY	Click a solution summary on the Case page, Service Order page or Quality Management page for a external content solution of type link or file	View solution details.
Case - Resolution Notes	RC_CASE_RSLN_NOTE	Click the Add Resolution Note or Attachment button on the Solutions Detail page (in attempted solutions mode).	Add notes and attachments that are associated with a resolution.

Using Suggested Solutions

Access the Solution - Suggested Solutions page.

Case 19 March 2004 Assigned Agent

Save Spell Check 360 360-Degree View Upsell Notification Email Time Entry Personalize

Case ID 1
Customer Savannah Lee
Summary The Ice Maker is broken.
Open Cases 4

Status Open - New Case
Contact Savannah Lee
Contact Method 642/467-8912-8129
Customer Value Gold☆☆☆☆

Case Solution Summary Notes Case History Related Cases Related Actions

Solutions Considered for this Case Customize Find View All First 1 of 1 Last

Select	ID	Description	Date Modified	Added By	*Status
<input type="checkbox"/>	22	How to fix if the refrigerator runs too ... Before making a service appointment, answer these questions: ...	03/19/2004 12:00:35PM PST	FUN	Failed Resolution

Email View

Suggested Solutions Search FAQ Frequently Used Solutions New Solution

Search Results

Select	Score	ID	Description
<input type="checkbox"/>	3	29	Steps to get odor out of the freezer. Since odors come from food, make sure all foods in your freezer are properly packaged in wrapping materials made specifically for freezers and be sure...

[More like this...](#)

Solution - Suggested Solutions page (1 of 2)

<input type="checkbox"/>	3	16	Steps to remove frost build-up on the inside of the refrigerator. If you have a manual defrost unit, frost build-up is normal in humid weather. Simply defrost the unit regularly during humid months and limit usage.
--------------------------	---	----	-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

[More like this...](#)

Attempt Solve View

Keywords The Ice Maker is broken.

Search [Advanced Search](#) [Search Tips](#)
[Preferences](#) [Create New Solution](#)

Save Case Escalate Case

Solution - Suggested Solutions page (2 of 2)

Select the solution that you want to either attempt or that you have used to resolve the problem. To move the solution to the Solutions Considered grid, click either Attempt or Solve. The system assigns it an appropriate status.

To email the solution to a customer, employee or agent, select the solution in the Solutions Considered grid and click Email. The system displays the Email page or the Email Reply or Start New Thread page.

To view a solution, select it and then click View. The system displays the Solution Details page. You can also click the Summary link to open the solution detail. From there you can attempt, solve, and add notes to the solution.



Click the Add a New Note button to access the Resolution Notes page. The button changes slightly based on whether it is a note to an attempted resolution or a successful resolution.

If there are no notes attached to the resolution, the system displays the Add a New Note button. If there are already notes attached to the resolution, the system displays the View Notes button. The Add a New Note button only shows up in the Attempted Solutions grid, not in the search results grid.

Note. The system displays the Suggested Solution tab only if NLP (Banter) is installed. The Suggested Solutions tab is delivered as hidden out of the box. To enable this functionality access the Display Template page. If you are not an NLP customer you do not need to enable this functionality.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Configuring Display Templates”.

Searching for Solutions

Access the Solution - Search page.

The screenshot shows the 'Solution - Search' page. At the top, there are tabs: 'Suggested Solutions', 'Search' (active), 'FAQ', 'Frequently Used Solutions', and 'New Solution'. Below the tabs, the 'Search Criteria' section includes four input fields: 'With all the Words' (containing 'Air Conditioner making loud noises'), 'With the Exact Phrase', 'With any of the Words', and 'Without the Words'. Below these is a 'Use Word Variations' dropdown menu and a 'Rows to Display' dropdown menu set to '10 rows'. There are 'Search' and 'Clear' buttons. To the right of these buttons are links: 'Basic Search', 'Search Tips', 'Preferences', 'Create New Solution', and 'More Search Options'. Below the search criteria, a message states 'Your search returned 1 result(s)'. A table displays the search results:

Select	Score	Type	ID	Description
<input type="checkbox"/>	80%	Solution	301043	Air conditioner making loud noises Try turning off air conditioner and check that nothing is blocking your fan. More like this...

At the bottom of the table, there is a 'View' button and a 'More like this...' link.

Solution - Search page

This page is a view of the Solution - Search page in the Advanced Search mode. There are additional search modes that you can access in addition to the Advanced Search mode. To access the Basic Search and More Options search pages, click the appropriate links. Information on using these search options is detailed in the Searching for Solutions section.

See [Chapter 3, “Managing Solutions,” Searching for Solutions, page 31](#).

Using FAQs to Search for Solutions

Access the Solution - FAQ page.

Suggested Solutions Search **FAQ** Frequently Used Solutions New Solution

Frequently Asked Questions

Library Air Cooling Systems

Search Results

Select	ID	Description	Last Modified
<input type="checkbox"/>	301043	Air conditioner making loud noises Air conditioner making loud noises More like this...	03/18/04 5:55PM
<input type="checkbox"/>	301051	How do I clean my Air Conditioner? How do I clean my Air Conditioner? More like this...	03/18/04 5:55PM

Solution - FAQ page

Library

Select the library that you want to use to search for solutions. Once you find a solution, select it and use the Attempt, Solve or View buttons to indicate the action that you want to take. To open the Resolution Details page, click the Summary link

Using Frequently Used Solutions

Access the Solution - Frequently Used Solutions page.

Case **Solution** Summary Notes Case History Related Cases Related Actions

Solutions Considered for this Case Customize Find View All First 1 of 1 Last

Select	ID	Description	Date Modified	Added By	*Status
<input type="checkbox"/>	301183	Blue Screen of Death appears with text Use the reset button to restart your computer: Locate the reset button on your computer....	10/22/2002 2:13:56AM PDT		In Consideration

Search FAQ **Frequently Used Solutions** New Solution

Frequently Used Solutions

Type All

Search Results

Select	Score	ID	Description
<input type="checkbox"/>	1	301087	Explanation on the Difference Between Desktop and Minitor Computers. Most desktop computers come in two basic configurations: desktop and minitor. The traditional desktop system is designed to sit on a desk, with the ... More like this...
<input type="checkbox"/>	1	301097	Fix for error message, Personal Computer display correct? ITN Monitors and their Computer video cards are not designed to be set outside of their configured setting ranges. For the video card and monitor vide... More like this...

Solution - Frequently Used Solutions page (1 of 2)

<input type="checkbox"/>	1	301101	Steps to Ensure that the modem is connected properly The telephone cable coming from the wall socket should be plugged into the LINE JACK connection on the back of the computer. If there is a network car...	More like this...
<div> <div>L</div> <div>Attempt</div> <div>Solve</div> <div>View</div> </div>				

Solution - Frequently Used Solutions page (2 of 2)

Type

Select the type of solution that you want the system to use for the search. Once you find a solution, select it and then click the Attempt, Solve or View button to indicate the action that you want to take. To open the Resolution Details page, click the Summary link

Entering New Solutions

Access the Solutions - New Solution page.

Case	Solution	Summary	Notes	Case History	Related Cases	Related Actions
------	-----------------	---------	-------	--------------	---------------	-----------------

Solutions Considered for this Case					Customize	Find	View All	First	1 of 1	Last
Select	ID	Description	Date Modified	Added By	*Status					
<input type="checkbox"/>	301051	How do I clean my Air Conditioner?... ANNUAL INSPECTION It is suggested that your air conditioner be inspected by your dea...	10/25/2002 10:27:19AM PDT	SAMPLE	In Consideration					
<div> <div>L</div> <div>Email</div> <div>View</div> </div>										

Suggested Solutions	Search	FAQ	Frequently Used Solutions	New Solution
---------------------	--------	-----	---------------------------	---------------------

Enter New Solution Replace filters in air ducts
<div>Attempt</div> <div>Solve</div>

Solutions - New Solution page

Enter text describing the solution that you are either attempting or have used to resolve the problem. Click either the Attempt or the Solve button to send the solution to the Solutions Considered grid, where it is assigned a status of either *In Consideration* or *Successful Resolution*.

Emailing Solutions

Access the Outbound Email page.

Outbound Email History

Refresh | 360 360-Degree View | Worklist | User Preferences

Recipient Spencer Underwood **Customer Value**

Representing

Outbound Email Note

Transaction Summary

Created On 09/25/2002 10:22AM PDT

Case ID 220321

Customer Spencer Underwood

Contact

Summary CD Drive making grinding noises

Status Open - New Case

Priority Medium

CD Drive making grinding noises

Compose

From Customer_Support@demo.com Delivery

To sunderwood@gbj.com Add/Moc

▼ **Template Search**

Related Transactions

Select	Type	ID	Summary
<input checked="" type="checkbox"/>	HelpDesk Case	220321	CD Drive making grinding noise

Category Complaint **Type** Em

Product Group Computer2 **Product** Cu

Keywords

Refresh Template List

Template RC: Case Status Report **Selected T**

Preview Apply Template

Add Closing Send Restart Response

Outbound Email page (1 of 2)

Message Area

Subject Your Case 220321 has been Resolved

Dear Valued Customer -

Your Case 220321 has been resolved. Please review the below Resolution for your case to see that it resolved your problem. If we do not hear from you we will assume that it did.

Details for Case 220321 :

Case Summary: CD Drive making grinding noises

Solution Summary: Go here for answer <http://support.dell.com/home.as>

Solution Details: Go here for answer <http://support.dell.com/home.aspx?~ck=mn>

Dear Spencer Underwood:

I would like to thank you for contacting the call center pertaining to the problem you have reported on 2002-09-25. I am glad that we were able to find a solution satisfactory to you. On behalf of the company, I want to extend our apologies for the inconvenience this has caused you. The following information has been provided for your records. Please reference the complaint number # 220321 for your future correspondence.

Attachments

No Attachment.

Upload an attachment

Outbound Email page (1 of 2)

Use this page to email the text of a solution to the customer or contact for the case, service order, or defect.

Use the From and To fields to indicate who you are sending the email to and from whom it is originating. Expand the Template Search section to select a category, type, product group, product, keywords, and template to use in the email you are sending.


You can also select a template from the Template field to add standard text that was set up at installation. To preview the text, click the Preview button. To add the text to the email, click the Apply Template button.

To add any disclaimer information that was set up when the application was installed, click the Add Closing button.

To redraft the email, click the Restart Response button. The Clear Template Search button clears the Category, Type, Product, and Keywords fields.

Reviewing Details of Attempted Solutions

Access the Resolutions Details page.

Case	
Resolution Details	
Solution	
Solution ID 301183	
Solution Type Standard Solution	Solution Library Computer Hardware
Solution Status Active	
Visibility All	
Summary Blue Screen of Death appears with text	
Keywords	
Symptoms	The Blue screen most often happens when rebooting the machine after a
Details	Use the reset button to restart your computer: Locate the reset button on your computer. In the Compass Notebook it is a small hole above the power-on switch. In the Compass Desktop it is a small hole below and slightly in front of the power-on switch. For both, use a thin, unbreakable instrument such as a straightened paper clip to push the button in that hole. Do not use something that may break off inside the hole, such as a pencil tip.
Metrics	
Usage Count	
1	
Solved Count	
1	
Datetime Added	
09/13/2002 3:36PM PDT	
Last Modified	
03/04/2004 3:02PM PST	
Solution Libraries	

Resolutions Details page (1 of 2)

Solution Notes

There are no Notes Related to This Solution

Solution Attachments

There are no Attachments Related to This Solution

Related Solutions

There are no Solutions Related to This Solution

Resolution Notes

Customize | Find |

First 1-2 of 2 Last

Summary	Visibility	Added By	Date Added
Rebuild computer to SPWX specs	All	Smith,Robert	05/25/2004 9:15AM
Tried rebooting	All	Smith,Robert	05/25/2004 9:00AM

Add Resolution Note or Attachment

Solve

[Return to Case](#)

Solutions Details page (2 of 2)

Use the Resolutions Details page to view the details of a solution and to add resolution notes.

Datetime Added and Last Modified Displays the date when the solution was attempted and last modified.

Add Resolution Note or Attachment Click to add a resolution note that is specific to this solution attempt.

Resolution Notes

This group box appears with data only if the solution is associated with resolution notes.

Summary Click the note's summary link to display note details on the Resolution Notes page.

Viewing External Content Solutions

Access the Solution page.

Save

Refresh

Personalize

Solution ID

301358

Usage Count

0

Summary

http://www.peoplesoft.com/corp/en/produ...

Solved Count 0

Solution ID

301358

Type

Link

Status

Active

Visibility

All

Summary

http://www.peoplesoft.com/corp/en/products/ent/crm/index.jsp

Keyword or Phrase

Install

Symptoms

Installing PeopleSoft CRM Procedures

Details

Use link to locate install procedures

Return to Solution

Solution Library

Appliances

☒ F.A.Q.

Metrics

Usage Count

0

Solved Count

0

Date Created

05/24/2004 10:52AM PDT

Date Modified

05/25/2004 9:41AM PDT

Solution Libraries

Appliances

There are no Notes Related to This Solution

There are no Attachments Related to This Solution

There are no Solutions Related to This Solution

Solution page

The system displays this page when a user clicks a solution that uses external content. The solution type for external content solutions is either *Link* or *File*.

Whenever a technician or agent uses external content to resolve a service order or case, the system creates a solution type of *Link* or *File* in the background to represent it.

When external content solutions appear in the search results grid, the description includes a link that opens the external content in a new window. If the external content is a file, it opens in the appropriate application.

Adding Resolution Notes and Attachments

Access the Resolution Notes page.

Case

Resolution Notes

Resolution Notes

Find | View All First 1 of 1 Last

*Summary

Access to air conditioner is not accessible from outside

Details

Customer is not home. Will not be back until 5 PM

*Visibility

All

Note Type

Comment

Added By

Smith,Robert

Added

09/25/2002 10:22AM PDT

Attachments

File Name	File Description	Added By	Date Added	
		Smith,Robert	05/25/2004 10:12AM	Delete

Attach a File

Save Resolution Note

Return to Resolution details

* Required Field

Resolution Notes page

Resolution notes created on this page are intermingled with notes on the Notes pages in PeopleSoft FieldService, PeopleSoft Support, PeopleSoft HelpDesk, and PeopleSoft HelpDesk for Human Resources.

PeopleSoft CRM provides a similar interface for working with notes and attachments across all the components that use this functionality. You can access resolution notes from the Solutions Considered grid, Attempted Solutions grid, and the Notes page.

See Also

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

PART 3

Transaction Billing Processor Integration

Chapter 5

Setting Up an Integration to PeopleSoft Transaction Billing Processor

CHAPTER 5

Setting Up an Integration to PeopleSoft Transaction Billing Processor

This chapter provides an overview of PeopleSoft Customer Relationship Management (PeopleSoft CRM) integration with PeopleSoft Transaction Billing Processor and discusses how to:

- Set up integrations to PeopleSoft Transaction Billing Processor.
- Work with on-demand billing.
- Set up sales and use tax for third-party tax vendors.

Understanding PeopleSoft CRM Integration with PeopleSoft Transaction Billing Processor

This section discusses:

- Billing and contracts functionality.
- Agreements and entitlements.
- PeopleSoft CRM transactions
- Cost category definitions.
- Pricing and invoicing.
- Reason codes.
- Tax calculations.
- Workforce synchronization.
- Item definition price types.
- Service order report.
- Accounting rules.
- Financial profiles of customers.
- Delivered enterprise integration points (EIPs).
- Fields populated in PeopleSoft Transaction Billing Processor.
- Contracts interface tables.

See Also

PeopleSoft Transaction Billing Processor 8.9 PeopleBook, “Getting Started with PeopleSoft Transaction Billing Processor”

PeopleSoft Transaction Billing Processor 8.9 PeopleBook, “Processing PeopleSoft Transaction Billing Processor Billing”

Billing and Contracts Functionality

PeopleSoft FieldService, PeopleSoft Order Capture, and PeopleSoft CRM call center applications can integrate with PeopleSoft Transaction Billing Processor or any third-party billing applications to:

- Send agreement, service order, and case fees to PeopleSoft Transaction Billing Processor.
- Send order capture service and product agreement information to PeopleSoft Transaction Billing Processor.
- Generate invoices for services, cases and agreement fees.
- Manage and book revenue to the appropriate general ledger accounts for recurring and one-time purchases of services and products.

Users can take advantage of the feature-rich billing functionality that is available through PeopleSoft Contracts, such as revenue recognition, billing cycle and schedule details, and accounting rules for applying revenue to the general ledger.

PeopleSoft also provides the ability to apply the appropriate surcharges and taxation to billable amounts and process the information using user-defined invoice formats.

Note. PeopleSoft CRM FieldService and Call Center do not calculate surcharges and taxes. These transactions are computed in PeopleSoft Transaction Billing Processor.

See Also

PeopleSoft Billing 8.8 PeopleBook, “Structuring Bills”

Agreements and Entitlements

Agreement information resides in PeopleSoft CRM. The system sends it to PeopleSoft Transaction Billing Processor for integration with PeopleSoft Billing and General Ledger. If you integrate PeopleSoft CRM with PeopleSoft Transaction Billing Processor, PeopleSoft CRM sends all agreement-based and on-demand transactions through to PeopleSoft Transaction Billing Processor. Entitlement discounts only on the additional discount or uplift amount in PeopleSoft CRM

PeopleSoft CRM sends transactions to PeopleSoft Transaction Billing Processor when they are ready to be billed, depending on the schedule.

In preparation for the integration to PeopleSoft Transaction Billing Processor, PeopleSoft CRM includes statuses and start and end dates on the agreement lines. To control the states that an agreement can move through during the agreement life cycle, PeopleSoft includes change control logic on the agreement status. PeopleSoft CRM uses the same status values that are used in PeopleSoft Transaction Billing Processor. The Pending Activation and Action Required statuses are, however, unique to PeopleSoft CRM

Note. The integration to PeopleSoft Transaction Billing Processor only works with PeopleSoft CRM release 8.9 and PeopleSoft Transaction Billing Processor 8.9.

Agreement Statuses

Here are the PeopleSoft FieldService and PeopleSoft Support agreement statuses:

Pending

Use this status when you create an agreement but you have not completed entering information into the agreement. This status enables you to save an agreement without initiating validation checking.

Pending Activation

An agreement is in the *Pending Activation* status when its data entry is complete and manager approval is obtained. Changing the status to the *Pending Activation* status triggers the message that is sent to PeopleSoft Transaction Billing Processor.

From this status, the system attempts to create a contract. If no errors occur, the contract is created in the *Active* status.

The agreement remains in *Pending Activation* status until the associated contract's billing and revenue plans are set to *Ready* status.

When the contract line is ready for billing and revenue, PeopleSoft Transaction Billing Processor sends a message to PeopleSoft CRM and the system moves the agreement from *Pending Activation* to *Active* status automatically so that PeopleSoft CRM can send transactions to PeopleSoft Transaction Billing Processor for processing.

Action Required

An agreement is in a status of *Action Required* when there is a failure on the activation of an agreement in PeopleSoft CRM or a failure on the contract activation in PeopleSoft Transaction Billing Processor. If the error occurs in PeopleSoft Transaction Billing Processor, it sends an error message to PeopleSoft CRM indicating that the agreement will remain in a status of *Action Required*. It remains in this status until the status changes to *Pending Activation* after you add the correct information to the agreement.

If the billing or revenue plan could not be set to *Ready* status, PeopleSoft Transaction Billing Processor sends an error message to PeopleSoft CRM indicating what information is missing or incorrect so that the appropriate areas can be corrected and another attempt can be made to put the billing plan or revenue plan in *Ready* status. In this case the system create a new contract.

Once the billing and revenue plan are in *Ready* status, then the system sets the agreement and contract automatically to *Active* status.

If there was any missing or incorrect information on the agreement, or if a server was down at the time of transmission, the agreement remains in *Action Required* status.

Active

If no errors exist for the agreement in the *Pending Activation* status, then the agreement is set to *Active* status. This occurs automatically after a contract is created and set to the *Active* status and a billing and revenue plan are created in the *Ready* status. The contract can now accept transactions from the agreement in PeopleSoft CRM.

Closed

A contract can be set to the *Closed* status when the agreement and agreement lines associated with the contract are in *Closed* status and all transactions associated with the agreement have been sent to billing and revenue.

When the Bill Plan or Revenue Plan is attempted to be completed or canceled, the system checks that the agreement and agreement lines associated with the contract are closed and that there are no pending service orders or

cases. If agreement lines are not closed or pending service orders and cases exist, the system displays an error message.

Note. You cannot initiate the closure of a contract from the CRM side.

The agreement becomes read-only when the status is set to *Closed* for the agreement.

Note. A contract can no longer accept transactions from PeopleSoft CRM once it has been closed.

See Also

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

PeopleSoft CRM Transactions

These are all the transactions PeopleSoft CRM sends to PeopleSoft Transaction Billing Processor.

- Agreement Fee (including renewal and uplift/discount)
- Order Capture Service Product (including recurring, service product free, and one time except not on demand)
- On Demand (including case fee, uplift/discount, service order fee, and service order fee uplift discount)
- Agreement Based (including case fee, uplift/discount, service order fee, and service order uplift/discount)
- Service Order (including labor fee, labor fee uplift/discount, material fee, material fee uplift/discount, expenses, expenses uplift/discount).

Note. The transactions with uplifts and discounts are sent to the customer on the same invoice as the fee. They appear as separate bill lines; therefore, they are considered separate transactions.

Cost Category Definitions

To retrieve the correct rate for a worker’s time, you must define cost category types using the Cost Category Definition page within the Service Level component. Cost category types are set based on the service level, which defines the service provider’s hours of operation.

The Service level setup page is used to configure a customer’s hours of operation. For example a service provider might define their hours of operation to be:

- Straight hours.
Monday through Friday 8:00 a.m. to 5 p.m.
- Overtime hours.
Monday through Thursday 5:00 p.m. to 8:00 a.m.
- Weekends.
Friday 5:00 p.m. to Monday 8:00 a.m.

Once you tie cost categories to the days and hours of operation, then the system can apply the correct rate to the provider group or provider group member. The Cost Category Definition page enables you to define the cost category for the service level hours of operation defined on the service level page. You can override begin and end times, select different cost categories, and enter multiple values for a given day.

In addition, you must define cost categories for workers to account for the cost of labor time to your company. You set up these cost categories by selecting Set Up CRM, Common Definitions, Employee Data, Cost Categories.

When technicians enter their hours in the time log based on that day and time, the system retrieves the correct rate from the member cost categories.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Setting Up and Managing Agreements and Warranties,” Defining Service Levels

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Setting Up and Maintaining Provider Groups and Group Members,” Establishing Cost Categories for Workers

Pricing and Invoicing

To price cases for a call center agent’s time or to implement pricing based on a flat fee per case, which is based on the price defined on the agreement, PeopleSoft CRM uses pricing logic that automatically reduces the number of hours or partial hours upon saving a case.

You can also price and invoice prepaid services by time or the number of service orders or cases initiated through PeopleSoft FieldService and Support.

Additionally, PeopleSoft has incorporated pricing features within the Service Order component to enable pricing for the billable elements of a service (material, time, and expense fees) and to synchronize the service price of the materials from PeopleSoft SCM with the information that resides on the service order.

You can also apply a service fee to cases and services orders.

The system retrieves the correct price from the Item Definition page in PeopleSoft CRM when the technician records material used at the customer site on the service order. The sum of the material used is calculated and summed up with the total cost of labor, expense charges, and service fees.

The service manager or contracts administrator can increase or decrease the sum of labor, material, and expense charges and recalculate fees to generate new service order totals. Surcharges and taxation are not, however, included in this total. These fees are calculated by billing and included on the invoice to the customer. You don’t, however, need an agreement to bill a flat fee for a case.

The integration begins with PeopleSoft Transaction Billing Processor when a user sets the status to *Pending Activation* for an agreement or service. The system creates a corresponding contract and contract line in PeopleSoft Contracts through PeopleSoft Transaction Billing Processor. Transactions such as service orders, service agreements, and case details are sent from PeopleSoft CRM to PeopleSoft Transaction Billing Processor and stored in the Contracts Interface tables. PeopleSoft Transaction Billing Processor utilizes PeopleSoft Contracts rate-based functionality and bills charges on an as-incurred basis. The transaction information is then forwarded to PeopleSoft Billing as bill lines for invoice generation. PeopleSoft Transaction Billing Processor manages the appropriate timing of sending these transactions to PeopleSoft Billing.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Defining Pricing Information for Services and Support Offerings”

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, “Creating and Managing Service Orders,” Managing Service Orders

Reason Codes

PeopleSoft CRM uses reason codes on the Agreement and Billing pages for service orders and cases to provide an informational reason as to why an adjustment was made to the fees.

The prompt values for the Reason field are from the Reason Code table (RB_REASON_CD). To facilitate the integration with PeopleSoft Transaction Billing Processor, PeopleSoft uses reason codes to further describe billing adjustments. When you set up reason codes, you also need to specify the correct reason type to make the reasons available within the transactions.

For service order billing, you can specify reason codes for service fees, material, time, expenses, and additional adjustments for the total cost of the service order. For agreement billing, you can specify reason codes for service fees, product fees, service and product fees, and additional adjustments to the agreement fee total. For cases, you can specify reason codes for case fees and time-based fees.

All reason code types enable the end user to choose predefined reason codes from the Reason Code table (PS_RB_REASON_CD). If the reason codes in the database are not adequate for the user to make a billing adjustment, end users can click the Other link and enter their own reason in the Detail field.

See Also

PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook, “Setting Up Call Center Prompt Tables,” Setting Up Reason Codes

Tax Calculations

For PeopleSoft CRM transactions that require VAT, the system sends the ship from location along with the address associated with the customer or the location where the product was shipped to PeopleSoft Transaction Billing Processor.

PeopleSoft CRM derives the customer ship to location from the FSCM (PeopleSoft Financials and Supply Chain Management) database. If VAT is set up for the services or products, the system determines whether VAT is required and performs the tax calculations to include on the invoice.

The system applies taxes during billing invoice finalization for value-added taxes (VAT) and sales and use taxes (SUT). Rarely are both applied at the same time; however, PeopleSoft provides the flexibility to handle both taxes for those countries where both taxes apply.

To add VAT and SUT functionality, use the VAT and SUT fields within the Agreement, Case and Service Order components and in the customer data model in PeopleSoft CRM. There are also links to the VAT setup pages in PeopleSoft SCM from the PeopleSoft CRM setup pages, where an administrator can move between applications easily to set up VAT.

Note. PeopleSoft Order Capture uses third-party tax calculation routines for Sales and Use tax as well as VAT tax calculations and does not use Simple Tax. Also, any taxes calculated by PeopleSoft Order Capture are recalculated in PeopleSoft Billing.

See *PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook*, “Setting Up PeopleSoft Order Capture,” Defining Tax Installation Options.

There are two methods that a service provider can use to determine sales and use taxes that can be applied to a case, service order, and agreement fee transactions:

- Simple Tax (PeopleSoft tax)

If the customer is tax exempt, users can link to the Tax Parameters page from the Billing page on the service order, case, or agreement and then select the Tax Exempt check box. Customers should inform the service provider if they are exempt from taxes and provide their tax certificate number. If a user selects the Tax Exempt check box they must also enter the tax certificate number.

Since the exemption certificates are synced, the exemption certificate is prompted from the customer exemption table. However, it does not have to exist in the customer exemption table. PeopleSoft CRM does not perform a validation. If a user creates new addresses for a company, consumer, or site, the user can select a tax code from the prompt. When the company, consumer, or site is selected for an agreement fee, service order fee, or case fee transaction, the newly created address and tax code are sent to PeopleSoft Transaction Billing Processor with the transaction.

- Third-Party Tax (Vertex or Taxware).

See [Chapter 5, “Setting Up an Integration to PeopleSoft Transaction Billing Processor,” Setting Up Sales and Use Tax for Third-Party Tax Vendors, page 93.](#)

When PeopleSoft Transaction Billing Processor sends the transaction to PeopleSoft Billing for invoicing, final taxes are calculated at the time of invoice finalization using either of these methods. For PeopleSoft Billing to calculate the taxes for service order transaction (including service fees, labor, materials, and expenses) or case transactions (case fee or labor fee), specific tax fields must be populated and sent along with the transaction.

The fields that need to be populated are dependent on the tax methodology used, either PeopleSoft Tax or Third-Party Tax. PeopleSoft Billing handles the information for PeopleSoft CRM services.

This table shows the combination of information passed to PeopleSoft Billing for VAT and sales tax determinations.

Field	Use	Defaults From
Ship To Customer ID	VAT Tax/ Sales/Use Tax	Customer
Ship To Address	VAT Tax/ Sales/Use Tax	Customer
Ship From Location	VAT Tax/ Sales/Use Tax	Contracts Business Unit
Tax Code	Sales/Use Tax	Customer
Tax Group	Sales/Use Tax	Product
Tax Transaction Type	Sales/Use Tax	Product
Tax Transaction Subtype	Sales/Use Tax	Product
Exemption Certificate (if applicable) and Certificate Number	Sales/Use Tax	Customer
Physical Location	VAT Tax	Product Note. Used only for PeopleSoft Order Capture.

Note. The source where PeopleSoft Billing derives this information is the contract line in PeopleSoft Contracts. Also, you can override all fields listed in this table on the billing plan. PeopleSoft CRM also uses order acceptance location, order origin location, and storage location for third-party tax calculations.

If billable transactions for PeopleSoft FieldService and call center applications require VAT, use the links on these PeopleSoft CRM setup pages to access the VAT Treatment page in PeopleSoft SCM:

- Service Types
- Cost Category
- Case Type
- Item
- Item Group

To add SUT information, access the Tax Parameters page in PeopleSoft CRM from the billing pages within the agreement, service order, or case. You can also access the Tax Parameters Definitions page in PeopleSoft CRM by selecting (Set Up CRM, Common Definitions, Tax Parameter Definitions).

See Also

PeopleSoft Working with Customers and Orders 8.8 PeopleBook, “Maintaining General Customer Information,” Setting Up Tax-Exempt Certificate Information

PeopleSoft Working with Customers and Orders 8.8 PeopleBook, “Maintaining General Customer Information,” Adding General Customer Information, Entering Customer VAT Information

PeopleSoft Financials, Enterprise Service Automation and Supply Chain Management Application Fundamentals 8.8 PeopleBook, “Defining Financials and Supply Chain Management Common Definitions,” Defining PeopleSoft Sales and Use Tax Authorities and Codes

PeopleSoft Global Options and Reports 8.8 PeopleBook, “Working with Value Added Taxes (VAT)”

Workforce Synchronization

To apply revenue to the correct general ledger accounts for the time an agent or field service technician spends on a case or service order, the Workforce EIP (WORKFORCE_SYNC) and the Business Unit HR Sync EIP (BUS_UNIT_HR_SYNC) from PeopleSoft Human Resources Management retrieves the human resources business unit and the general ledger business unit for every worker.

The system stores the general ledger business unit information within the person data structure. The Business Unit HR Sync EIP (BUS_UNIT_HR_SYNC) from PeopleSoft HCM maps the human resource business unit information to the general ledger business unit.

This links the general ledger business unit to the call center agent or field service technician. To accomplish this, PeopleSoft created two fields in the Worker component for the general ledger business unit and the human resources business unit.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Workforce Management”

Item Definition Price Types

The Item Definition page contains two pricing fields: Service Price and Service Exchange Amount. The service price is what the field technician charges the customer for using an item, regardless of whether it is an install or repair. The service exchange amount is what the field technician charges when they replace an old part with a new one. This charge is deducted from the service price.

For example, a company has a service price of 10.00 USD for a new PC chip. The service exchange amount is set to 4.00 USD. When the field technician removes the part (item) from the installed product and replaces it with a new item, then the new chip costs 6.00 USD. In this case, the service exchange amount (4.00 USD) is subtracted from the service price (10 USD).

These fields map to the PeopleSoft Supply Chain Management pricing fields (created specifically for pricing items in PeopleSoft FieldService). When the item price is synchronized with the item master, the system checks the appropriate fields for item definitions. The price and currency code are exposed on the Item Definition page when there is integration with PeopleSoft SCM but they are not available for update. Therefore, the currency and price cannot be modified on the Item Definition page.

However, if the items are not synchronized with PeopleSoft SCM, the administrator may enter price information on the Item Definition page. To stay in sync with the Item Definition page in PeopleSoft Supply Chain Management, the same fields and labels are used in PeopleSoft CRM.

The system displays these fields on the Item Definition page in PeopleSoft CRM:

- **Currency Code**

This field prompts on the Currency Code table (CURRENCY_CODE_TABLE). The administrator can select the currency code for each item, because items can have different currency codes. This field is not required.

- **Service Price**

Enter an amount for the item. This field is not required.

- **Service Exchange Amount**

Enter an amount for the item if it is being exchanged for a newer or working item. This field is not required.

Note. These prices are only used within the service order when calculating the pricing for materials.

See Also

PeopleSoft Managing Items 8.8 PeopleBook, “Defining Items”

PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook, “Defining Items”

Service Order Reports

PeopleSoft FieldService provides two reports that are used to detail the services that have to be performed for a service order and provide expense details to customers.

Here are descriptions of the reports:

- **Service Order Estimate Report**

Once a technician enters time, material, and expense information in a service order, the contract administrator, service manager, or technician may generate a report to provide to the customer for services performed. This report is an estimate of the dollar amount that is planned for the job. It includes all activities with the planned start and stop dates and times, the status of each activity, the charge for performing the service, and any materials that are going to be used. There is a comments section that the technician can use to report actual material and labor if it is different than what was specified on the report. This report does not include taxes and surcharges and it is not a bill. To launch the report from the Service Order page the user clicks the Estimate Report button on the toolbar.

- **Service Order Detail Report**

This report is used by technicians to list the work that they have to perform to fulfill the requirements of the service order. To launch the report from the Service Order or My Service Order page the user clicks the Detail Report button on the toolbar.

See Also

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, “PeopleSoft Integrated FieldService Reports”

Accounting Rules

To define the various attributes of an agreement, service order, or case that should be sent to specific revenue accounts, set up accounting rules in PeopleSoft Transaction Billing Processor during implementation.

The integration to PeopleSoft Transaction Billing Processor enables users to manage and book their revenue by posting revenue accounting entries to their general ledger for agreement fees and services rendered, which are entered on service orders and cases.

For accounting purposes, these fields must be populated in the Contracts Interface table by PeopleSoft CRM:

Transaction Source	Indicates the origin of the transaction. For example, if the value is CRM, it tells the system that the transaction is from PeopleSoft CRM.
From GL Unit	This is the source general ledger business unit (GLBU). Enter the source PeopleSoft General Ledger business unit. With the exception of employee-related transactions (service orders), this value should always be the same as the value in the GL Business Unit field.
GLBU	The PeopleSoft General Ledger business unit defines where the accounting entry is booked. The system populates this field from various sources based on the type of transactions: <i>Agreement Fee Transactions</i> , <i>Service Order Transactions</i> , or <i>Support Case Transactions</i> .
Transaction Type and Transaction Subtype	These fields reside in PeopleSoft Transaction Billing Processor, they are system-defined codes to identify whether the transaction is an agreement, service order, or support case. This field is critical for Transaction Billing Processor to know the type of accounting. Accounting rules setup is different depending on this field.
Accounting Date	This is populated with the transaction date if no date is sent from PeopleSoft CRM.
Department	This field is optional. Wildcard this value in the accounting rules to use the department sent from PeopleSoft CRM in the revenue accounting entry.

See Also

PeopleSoft Transaction Billing Processor 8.9 PeopleBook “Working with the Transaction Billing Processor,” Setting Up PeopleSoft Transaction Billing Processor

PeopleSoft Contracts 8.8 PeopleBook, “Working with PeopleSoft Project Costing,” Setting Up Rules and Exceptions for Organizational Sharing

PeopleSoft Project Costing 8.8 PeopleBook, “Setting Up Accounting for Projects,” Defining Accounting Rules

Financial Profiles of Customers

The 360-degree view integration to PeopleSoft Accounts Receivable provides the ability to display financial profiles of the customer for agreement-based service fees and service order and case transactions.

Customer profile information that is applicable to the services integration to PeopleSoft Transaction Billing Processor includes: statement number, statement date, statement currency, statement total, bill to customer, outstanding balance, and past due balance.

For invoice data, PeopleSoft CRM sends a request application message to PeopleSoft Billing. PeopleSoft Billing sends a response application message to PeopleSoft CRM with the information that appears under the 360-Degree View tree. In addition, once invoices and payments appear on the 360-Degree View tree for a customer, you can click an invoice or payment to access PeopleSoft Billing where you can view more details on the invoice.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Setting Up the 360-Degree View,” Setting Up the 360-Degree View Tree

Delivered Enterprise Integration Points (EIPs)

This table lists the EIPs that PeopleSoft CRM delivers to facilitate the integration of PeopleSoft CRM applications to PeopleSoft Financial Management Services (PeopleSoft FMS), PeopleSoft Enterprise Service Automation (PeopleSoft ESA), PeopleSoft Supply Chain Management (PeopleSoft SCM), and PeopleSoft Human Capital Management (PeopleSoft HCM).

Note. The database code for PeopleSoft Financials and Supply Chain Management is FSCM.

Channel Name	Description	Message Name	Directions of Integration	Technology
FO_SYNC	Sends tax code definitions from PeopleSoft FSCM to CRM.	TAX_HEADER_TBL_FULLSYNC	FSCM —> CRM	Application Message
HR_SETUP	Maps PeopleSoft HCM business units to general ledger business units.	BUS_UNIT_HR_SYNC BUS_UNIT_HR_FULLSYNC	HCM —> CRM	Application Message
CONTRACT	Synchronizes request and response messages from PeopleSoft CRM and Contracts for pending activities regarding agreements, transactions, invoicing, and contracts.	CONTRACT_REQUEST CONTRACT_RESPONSE CONTRACT_TXN PENDING_ACTIVITY	CRM —> ESA CRM <— ESA CRM —> ESA CRM <—> ESA	Application Message

Channel Name	Description	Message Name	Directions of Integration	Technology
SERVICE	Synchronizes messages from PeopleSoft CRM to Contracts for accounting definitions, VAT, and VAT drivers.	SERVICE_SYNC SERVICE_FULLSYNC SERVICE_TYPE_SYNC SERVICE_TYPE_FULLSYNC	CRM —> ESA	Application Message
COST_CATEGORY	Synchronizes cost categories (called labor type in PeopleSoft FSCM) from PeopleSoft CRM to Contracts for accounting definitions and VAT drivers.	COST_CATEGORY_SYNC COST_CATEGORY_FULLSYNC	CRM —> ESA	Application Message
CASE	Synchronizes case types and accounting definition information from PeopleSoft CRM to Contracts.	CASE_TYPE_SYNC CASE_TYPE_FULLSYNC SOURCE_SYNC SOURCE_FULLSYNC	CRM —> ESA	Application Message
ENTERPRISE_SETUP	Synchronizes schedule information from PeopleSoft Financials to CRM for agreement information and revenue recognition.	SCHEDULE_SYNC SCHEDULE_FULLSYNC	FMS —> CRM	Application Message
BI_SETUP	Synchronizes bill types and bill sources from PeopleSoft SCM to CRM for contract transactions.	BILL_TYPE_SYNC BILL_TYPE_FULLSYNC BILL_SOURCE_SYNC BILL_SOURCE_FULLSYNC	SCM —> CRM	Application Message
VAT_TRANSFER	Generates request and response messages from PeopleSoft CRM to global VAT to generate VAT defaults.	VAT_TRANSFER_REQ VAT_TRANSFER_RSP	SCM <—> CRM	Application Message

Channel Name	Description	Message Name	Directions of Integration	Technology
PAY_TERMS	Synchronizes messages from PeopleSoft FSCM to CRM for payment terms.	PAY_TERMS_SYNC PAY_TERMS_FULLSYNC	SCM —> CRM	Application Message
AGREEMENT	Generic message for synchronizing agreement information with third-party vendors.	AGREEMENT_SYNC	FieldService <—> External	Application Message
SERVICE_ORDER	Generic message for synchronizing service order billing information with third-party vendors.	SERVICE_ORDER_BILLING_SYNC	FieldService <—> External	Application Message

Fields Populated in PeopleSoft Transaction Billing Processor

This section discusses:

- Contract header
- Contract line
- Billing plan
- Revenue plan
- Tax parameters

Note. PeopleSoft CRM sends fields to PeopleSoft Transaction Billing Processor to create the contract, contract line, and revenue and billing plans. Many of these fields can be changed manually on the contract. If you wish to change a field after contract activation has taken place, you must create an amendment using PeopleSoft Transaction Billing Processor amendment functionality.

Contract Header

These fields must be populated in the contract header. These values are sent from the PeopleSoft CRM agreement. This list contains fields that can be overridden on the contract header once they are populated from the CRM agreement.

- Bill To Contact
- Bill To Customer
- Bill To Address
- Purchase Order ID
- Payment Terms
- Sold To Customer

This list contains fields that cannot be overridden on the contract header:

- Sold To Customer
- CA Business Unit
- Currency Code

Here are additional fields that are required on the contract header and the source from which the systems retrieves the value for the field:

PeopleSoft Contracts Field Name	Source
Bill Type Note. This is sent from PeopleSoft CRM.	PeopleSoft Contracts Business Unit
Legal Entity	PeopleSoft Contracts Business Unit
Contract Signed Date	The system populates this field with the current date. PeopleSoft CRM must send this date if they want to override the default contract signed date.
Contract Type	PeopleSoft Contracts Business Unit
Exchange Rate Type	PeopleSoft Contracts Business Unit

Contract Line

These fields that must be populated in the contract line. These values are sent from the PeopleSoft CRM agreement or on demand service order/case. The list contains fields that can be overridden on the contract line once they are populated from the CRM agreement.

Fields that can be overridden on the contract line:

- Line Description
- Ship From Location (source = PeopleSoft Contracts business unit)
- Start Date
- End Date

Note. These fields are not sent from PeopleSoft CRM, except Line Description.

The Currency Code field cannot be overridden on the contract line. The source for the currency code is the contract header.

Billing Plan

These fields that must be populated in the billing plan. These values are sent from the PeopleSoft CRM agreement or on demand service order/case. The list contains fields that can be overridden on the billing plan once they are populated from the CRM agreement.

Fields that can be overridden on the contract line:

- Bill To Contact
- Bill To Customer
- Bill To Address

- Schedule ID

These fields appear on the Billing Plan General page. The system populates the fields on this page upon contract creation. The table shows the source from which each field is populated, if the value can be changed in the billing plan in PeopleSoft Transaction Billing Processor, and if the field can be overridden by transactions sent from PeopleSoft CRM:

Billing Plan Field	PeopleSoft Contracts Source	Changeable?	Can be overwritten by CRM on transaction?
Billing Notes Note. You can create a note in PeopleSoft Transaction Billing Processor and attach that note to a billing plan. It can be sent to PeopleSoft Billing as part of the generated invoice.	Manual process	Yes	Yes
Contract Number	Contract header	No	No
Billing Plan Number	Billing plan	No	No
Billing Method	Contract line	No	No
Currency Code	Contract header	No	No
Bill Plan Description	Contract header	Yes	No

Other fields on the Billing Plan General page, such as the Billing Inquiry, Billing Specialist, Billing Authority, Cycle ID, Bill By ID, and Invoice Form can be added to the billing plan manually or left blank.

Revenue Plan

A contract line is linked to a revenue plan to recognize revenue. The required revenue plan fields populate automatically during contract creation and cannot be overwritten from the transaction data that is sent from PeopleSoft CRM. The revenue plan fields are managed entirely from the contract.

These fields are required for the Revenue Plan page. The table shows the source from which each field is populated. These fields cannot be overridden by transactions sent from PeopleSoft CRM:

Revenue Plan Field	PeopleSoft Contracts Source
Contract Number	Contract header
Sold To Customer	Contract header
Business Unit	Contract header
Revenue Method	Contract Line
Currency Code	Contract header
Revenue Plan Description	Contract header

Revenue Plan Field	PeopleSoft Contracts Source
Hold (flag)	Revenue Plan
Events	Contract header

Note. If there is a credit hold on a customer in PeopleSoft CRM, you must put the revenue plan for the contract on hold by selecting the Hold check box on the Revenue Plan page to prevent transactions from processing. If you select the Hold check box, then you must release the hold manually when you are ready to recognize revenue for the customer.

While every created contract line has a revenue plan, recurring fees do not utilize the revenue plan for revenue recognition. Revenue plans build a deferred revenue schedule associated with the billing transactions. In addition, on demand transactions do not need a revenue plan to recognize revenue. PeopleSoft Billing manages revenue for on demand transactions. PeopleSoft Billing manages the revenue method for all on demand and recurring transactions.

Tax Parameters

PeopleSoft CRM sends tax parameter information for agreements to PeopleSoft Transaction Billing Processor. PeopleSoft Transaction Billing Processor stores the CRM tax information in the Contract Interface tables (INTERFACE_CA) and passes this information onto PeopleSoft Billing for processing. The Billing Plan General -Tax Parameters tab is not available for CRM contracts.

Here are the tax fields passed from PeopleSoft CRM to the contract interface tables:

- Ship From Location
- Tax Code
- Tax Group
- Transaction Type
- Transaction Sub Type
- Exemption Certificate
- Physical Nature
- Order acceptance location.
- Order origin location.
- Storage location.

PeopleSoft CRM sends fields to PeopleSoft Transaction Billing Processor to create the contract, contract line, and revenue and billing plans. Many of these fields can be changed manually on the contract. In addition, PeopleSoft Transaction Billing Processor receives sales and use and VAT tax parameters if they are sent by PeopleSoft CRM.

Transaction Billing Processor Interface tables (INTFC_CA, INTFC_CA2, INTFC_CA_HDR, and INTFC_CA_NOTE) are duplicates of the Billing interface tables. However, the first two keys on the billing table, INTFC_ID and INFC_LINE_NUM, have been changed to the single key CA_TXN_ID on the Transaction Billing Processor tables.

See Also

PeopleSoft Contracts 8.8 PeopleBook, Processing PeopleSoft Contracts Billing

PeopleSoft Billing 8.8 PeopleBook, Entering Bills Online

Contracts Interface Tables

The Contracts Interface tables store the transactions from PeopleSoft CRM. The Transaction Billing Processor interface tables (INTFC_CA, INTFC_CA2, INTFC_CA_HDR, and INTFC_CA_NOTE) are duplicates of the Billing interface tables. However, the first two keys on the billing table, INTFC_ID and INFC_LINE_NUM, have been changed to the single key CA_TXN_ID on the Transaction Billing Processor tables.

PeopleSoft FieldService and Support

PeopleSoft CRM sends service order transaction information, case transaction information, and service agreement fees to be billed or accounted for to the Transaction Billing Processor interface tables.

PeopleSoft Order Capture

PeopleSoft Order Capture sends these fields to PeopleSoft Transaction Billing Processor for every transaction:

- Sold to Customer
- Sold To Contact
- Sold To Address
- Contract business unit

PeopleSoft Transaction Billing Processor sends these fields to PeopleSoft Order Capture as a response:

- Contract Number
- Contract Line Number
- PeopleSoft Contracts Business Unit
- Error Status
- Error Message

Transactional Billing Plans

The system creates a billing plan with an *As-incurred* billing method for the service transactions sent from PeopleSoft CRM to PeopleSoft Contracts. Pricing occurs in PeopleSoft CRM for all services on the agreement such as service order transactions, service agreement fees, and cases. Contract lines within an agreement related contract are linked to the billing plan. Although these billing plans contain rules defined by default upon contract creation, you can manually override the system defaults.

This table contains fields on the billing plan, their source from within PeopleSoft Contracts, whether or not the field can be overridden on the billing plan manually, and whether or not the field can be overridden by the transaction message sent from PeopleSoft CRM.

Field	CA Source	Override on billing plan?	Override from CRM transaction?
Billing Notes	Manual Process	Yes	Yes
Contract #	Contract Header	No	No
Billing Plan #	Billing Plan	No	No
Billing Method	Contract Line	No	No
Currency Code	Contract Header	No	No
Bill Plan Description	Contract Header	Yes	No

You can link only CRM lines to a billing plan created from CRM transactions. You cannot mix lines with different transaction sources on the billing plan. For example, you cannot link a CRM contract line with a Project Costing contract line.

PeopleSoft FieldService, PeopleSoft Support and PeopleSoft Order Capture send credit card information to PeopleSoft Transaction Billing Processor. PeopleSoft Transaction Billing Processor does not validate the credit card numbers.

Common Elements Used in This Chapter

Agreement

A PeopleSoft CRM agreement is a list of obligations to which a service provider has agreed or committed to the customer. The agreement lines listed on the agreement include services and products covered by the agreement, information regarding who or what customer locations can request service, and the level of service that is provided, which includes restore time, response time, prime period of maintenance, and service coverage (time, material, and expense).

Agreement Pricing

Agreement pricing records define the fee paid for a specific service or support offering. The agreement price is paid when the agreement is issued to or signed by the customer. PeopleSoft CRM also allows you to initiate recurring charges where a customer might pay a fee on a monthly or quarterly basis.

Agreement Service Pricing

Agreement service pricing records define what the customer pays when the work associated with the service or support offering on the agreement is performed. This includes the price paid per transaction covered by the agreement line.

Billing Plan

When the system creates a contract it also generates a billing plan that is linked to a contract line. The billing plan determines how a transaction should be billed. It contains customer billing information, billing method (for example, as-incurred), and status of the billing plan.

Contract Amendment

A contract amendment is any change made to an active contract where you are altering the fundamental obligations and entitlements of the contract.

Deferred Revenue	Deferred revenue helps to create and send invoices for products or services that are to be delivered in the future or over a range of time. You may use deferred revenue to generate accounting entries that defer revenue recognition based on a revenue recognition date and proration method that you select.
General Ledger	General ledger is where all of the journal entries are posted. Journal Generator populates the general ledger with accounting entries (for example, accounts receivable and revenue entries).
Location	Select the location of the store where the order is to be purchased. This field is used for tax vendor exceptions and reporting
Order Acceptance Location	Select the location where the order is to be accepted. The system uses this field to determine tax jurisdiction.
Order Origin Location	Select the location where the order originated. The system uses this field to determine tax jurisdiction.
Rate based Contract Line	A rate-based contract line is a transaction-based offering (or an ad hoc offering) that PeopleSoft Transaction Billing Processor picks up and sends to PeopleSoft Billing.
Revenue Plan	When the system creates a contract, a revenue plan is also created and associated with a contract line. You can create revenue plans either automatically or manually. The contract line, however, must be linked to the revenue recognition plan to recognize revenue.
Revenue Recognition	Revenue recognition is when the system sends revenue information to the general ledger, and it is counted in the revenue projection for the accounting period.
Store Location	Enter the address of the store location.

Note. If you are using a third-party tax vendor, the entry in this field should match the store location code in Vertex or Taxware.

Setting Up Integrations to PeopleSoft Transaction Billing Processor

To define agreement options, time types and tax parameters, use the Agreement Options (RF_AGR_OPTIONS), Time Type (RF_TIME_TYPE) and Tax Parameters (RF_TAX_PARAM) components.

This section discusses how to:

- Establish billing and pricing options.
- Map agreement setIDs with contracts and general ledger business units.
- Set up time types for PeopleSoft FieldService.
- Set up billing options for PeopleSoft FieldService.
- Set up billing options for PeopleSoft Call Center.
- Set up billing options for PeopleSoft Order Capture.

Note. It is necessary to activate the messages, message subscriptions, message channels, node transactions and relationships (from the EIP chart earlier) in to use the integration to PeopleSoft Transaction Billing Processor.

See Also

Chapter 5, “Setting Up an Integration to PeopleSoft Transaction Billing Processor,”
Delivered Enterprise Integration Points (EIPs), page 69

Pages Used to Set Up Integrations to PeopleSoft Transaction Billing Processor

Page Name	Object Name	Navigation	Usage
Billing and Pricing Options	RB_INTEGRATION	Set Up CRM, Install, Installation Options, Billing and Pricing Options	Turn on integration to PeopleSoft Transaction Billing Processor for PeopleSoft FieldService, Call Center, and Order Capture. Enable pricing for service order and cases.
Agreement Options	RF_AGR_OPTIONS	Set Up CRM, Common Definitions, Agreement Options, Agreement Options	Map the agreement setIDs with the business units for both PeopleSoft Transaction Billing Processor and PeopleSoft General Ledger.
Time Types	RF_TIME_TYPE	Set Up CRM, Product Related, FieldService, Time Type, Time Types	Establish the defaults for the types of time that are billable for the business units being set up under the selected setID.
Billing Options	RF_BU_BILL_OPTIONS	Set Up CRM, Business Unit Related, FieldService Definition, Billing Options.	Set up billing options for PeopleSoft FieldService.
Business Unit Billing Details	BUS_UNIT_RC_BI_SEC	Set Up CRM, Business Unit Related, Call Center Definition, Options. Select Bill for Cases and then click the Details link	Set up billing options for PeopleSoft Call Center applications.
Order Capture Definition - Internal	BUS_UNIT_RO1	Set Up CRM, Business Unit Related, Order Capture Definition, Internal.	Set up billing options for PeopleSoft Order Capture.
Tax Parameter Definitions	RF_TAX_PARAM	Set Up CRM, Common Definitions, Tax Parameter Definition, Tax Parameter Definition	Set up sales and use taxes for service, material, labor, expenses, and cases for third-party tax vendors.

Establishing Billing and Pricing Options

Access the Billing and Pricing Options page

The screenshot shows the 'Billing and Pricing Options' page. It features four tabs at the top: 'Alt Character', 'Anonymous Object', 'HRHD EIP Options', and 'Billing and Pricing Options'. The 'Billing and Pricing Options' tab is selected. Below the tabs, there are three sections of options, each with a title and a list of checked items:

- FieldService Options:**
 - ☒ Send Billing Transactions to Contracts
 - ☒ Calculate Price on Service Orders
- Call Center Options:**
 - ☒ Send Billing Transactions to Contracts
 - ☒ Calculate Price on Case
- Order Capture Options:**
 - ☒ Send Billing Transactions to Contracts

A 'Save' button is located at the bottom left of the page.

Billing and Pricing Options page

Note. There are no installation options for third-party integration given that there is no way to determine what validation checking is required on the system to receive agreement, service order, or case data.

Send Billing Transactions to Contracts

Select this check box to send agreement fee billing date, service order billing data, case fees, and order information to PeopleSoft Transaction Billing Processor for billing and accounting.

The system sends agreement fees, case fees or service order fees to PeopleSoft Transaction Billing Processor when the case or service order is closed. For PeopleSoft Order Capture the system sends the information to PeopleSoft Transaction Billing Processor when you submit the order. These options are not available when delivered out-of-the-box.

Calculate Price on Service Orders

Select this check box if you want the system to price on-demand and agreement-based service orders.

Calculate Price on Case

Select this check box if you want the system to price agreement- and on-demand cases.

Mapping Agreement SetIDs with Contracts and General Ledger Business Units

Access the Agreement Options page.

*SetID	Contracts Business Unit	GL Business Unit	Location Code	Location Description	Schedule
CRM01	US003	US003	US120	CRM APPLIANCE MAIN OFFICE	MONTHLY
CRM02	US001	US001	US130	CRM Hardware/Software Main	MONTHLY
CRM03	US002	US001	KUNY00	Corporation Headquarters	ANNUAL

Agreement Options page

Agreement Options Tab

Use the fields within this tab to map the agreement setIDs with the business units for both PeopleSoft Transaction Billing Processor and PeopleSoft General Ledger.

This mapping links the agreement to the corresponding contract. The system uses the existing business unit EIP to obtain all contracts and general ledger business units from the PeopleSoft FSCM database.

SetID	Enter the setID that you want to use with the agreements that you create for integration to PeopleSoft Transaction Billing Processor.
Contracts Business Unit	Enter the business unit that you want to use to create contracts in PeopleSoft Transaction Billing Processor. The PeopleSoft Transaction Billing Processor business unit must be tied to the agreement to facilitate the proper creation of a contract and to enable the appropriate default values to be selected when the contract is created.
GL Business Unit (general ledger business unit)	Enter the general ledger business unit that you want associated with the setID. The GL Business Unit field is required for contracts integration with PeopleSoft Global to send revenue to the appropriate general ledger account.
Location Code	The location code prompts from the Location table (LOCATION_TBL) in PeopleSoft CRM and returns a location code. The system sends the country and state information to PeopleSoft Transaction Billing Processor with the agreement transaction. This information is needed to calculate VAT tax rates. The location table in PeopleSoft CRM is synced with the location table in the PeopleSoft FSCM database (two-way).
Schedule	Select the schedule by which you want to bill the customer.

Note. When the system creates the agreement it gets the setID, the contracts business unit, and the general ledger business unit from the Agreement Options page.

Billing Options Tab

Select the Billing Options tab.

Use the fields within this tab to map the agreement setID to the bill type and the bill source.

For example, suppose that the CRM01 setID identifies the bill type and bill source as a SERVICE, the system sends the information to PeopleSoft Transaction Billing Processor to override the Bill Source and Bill Type fields on the PeopleSoft Transaction Billing Processor billing plan.

Bill Type

Select the bill type that you want associated with the setID.

The bill type prompts on all bill type identifier codes that are synced from PeopleSoft Billing to PeopleSoft CRM. The bill type code is a user-defined value in PeopleSoft Billing.

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 synced from PeopleSoft Billing to PeopleSoft CRM. The bill source code is a user-defined value in PeopleSoft Billing.

Note. You can use both the Bill Type and Bill Source fields to define bill by identifiers in PeopleSoft Billing. If CRM overrides the Bill Type and Bill Source fields on the PeopleSoft Transaction Billing Processor billing plan with values defined in the CRM Billing Options page, then depending on the Bill By Identifier hierarchy in Billing, these values may be used to control the way that the invoices can be grouped.

On the Billing Options page, the Bill Type and Bill Source fields are optional. If they are not set in PeopleSoft CRM, the billing plan in PeopleSoft Transaction Billing Processor sets these fields based on the contracts business unit. PeopleSoft Billing still determines the bill by identifiers that are used based on its bill by identifier hierarchy.

Tax Options Tab

Select the Options tab.

Use the fields on this tab to indicate where the order originated, where it will be accepted, and where the store is located. This information is used for tax purposes.

Setting Up Time Types for PeopleSoft FieldService

Access the Time Types page.

Time Types

SetID CRM01

*Time Type	*Short Description	*Description	Billable
001	Activity	Service Order Activity	<input checked="" type="checkbox"/>
002	Break	Break Time	<input type="checkbox"/>
003	Wait	Wait Time	<input checked="" type="checkbox"/>
004	Travel	Travel Time	<input checked="" type="checkbox"/>

Add Time Type

Time Types page

Use this page to establish time types and indicate to the system which time types are billable. The system uses this information on the Billing Options page when you are setting up business units. If you enter one or more time types for a given setID, all PeopleSoft FieldService business units that use that setID as its default inherit the time types for the setID, including the billable flag.

For example, if you select the *Billable* check box for the *Break* time type, the system selects it as billable in the Time Type grid on the Billing Options page for the PeopleSoft FieldService business unit.

Time Type	Enter a number by which you want to order the time type that you are entering. The numbers that you enter determine the order in which the time types appear on the Billing Options page.
Short Description and Description	Enter the short and long description of the time type.
Billable	Select if you want to set the default to billable for the time type.

Note. If the installation option is not set to *Calculate Price on Service Orders*, then the system hides the Business Unit - Billing Option page, which contains the billable fields that you are entering on this page.

Setting Up Billing Options for PeopleSoft FieldService

Access the Billing Options page.

The screenshot shows the 'Billing Options' page for PeopleSoft FieldService. The page has two tabs: 'Business Unit' and 'Billing Options', with 'Billing Options' selected. The 'Billing Information' section contains the following fields and values:

- *Contracts Business Unit: COM01 (Communications)
- *GL Business Unit: COM01 (Communications)
- Bill Type: CA (CONTRACTS)
- Bill Source: SERVICE (Service)
- ☒ Material Billable
- ☒ Expense Billable

Below these is a 'Time Type' table:

Type	Billable
Activity	<input checked="" type="checkbox"/>
Break	<input type="checkbox"/>
Travel	<input checked="" type="checkbox"/>
Wait	<input checked="" type="checkbox"/>

The 'Tax Information' section contains the following fields and values:

- Order Origin Location: CALLCTR (GBI Central Call Center)
- Order Acceptance Location: CABRANCH (GBI Sales - California Branch)
- Location: MAINHQ (GBAI Main Office - Headquarter)
- Store Location: Store 7

Billing Options page

Billing Information

Use the fields within this group box to enter the information that is needed for PeopleSoft FieldService to integrate with PeopleSoft Transaction Billing Processor. To apply revenue to the correct general ledger account for service order fees, link the business units for PeopleSoft FieldService, Contracts, and General Ledger. This information is included in the contract transaction message that the system sends to PeopleSoft Transaction Billing Processor when the service order closes.

Note. You can link only one general ledger business unit to a service order. You cannot override the GL Business Unit field from the service order. The system does not display this field on the Service Order page in PeopleSoft FieldService.

Contracts Business Unit	Enter the contracts business unit that you want to use for billing.
GL Business Unit	<p>Enter the general ledger business unit that you want to use for billing.</p> <p>The prompt values for this field include all business units for all product lines. Populating this field enables mapping between the general ledger business unit and the field service business unit.</p> <p>The Service Order page does not display the general ledger business unit or contracts business unit. When a service order closes, the system sends the general ledger business unit, contracts business unit, and contract ID to PeopleSoft Transaction Billing Processor with other transaction information.</p>
Bill Type	<p>Select the bill type that you want associated with the business unit.</p> <p>The prompt values for the Bill Type field include all bill type identifier codes that are sent from PeopleSoft Billing to PeopleSoft CRM.</p>
Bill Source	<p>Enter the bill source that you want to associate with the business unit.</p> <p>The prompt values for the Bill Source field include all bill source identifier codes that are sent from PeopleSoft Billing to PeopleSoft CRM.</p>

Note. The system sends the Bill Type and Bill Source fields with every service order transaction if one or both have been set on the FieldService Business Unit - Billing Options page.

Material Billable and Expense Billable	<p>Select the check boxes that you want to use for billing purposes on service orders for the business unit that you are defining.</p> <p>If you select the Send Billing Transaction to Contracts and Calculate Price on Service Orders check boxes on the Installation Options page, then the system automatically selects the Material Billable and Expense Billable check boxes.</p> <p>The system administrator, however, can override these values by clearing the check boxes.</p>
Time Type and Billable	<p>Select the Billable check box to make the time type a billable item on the service order for the business unit.</p> <p>The defaulting of time types is based on the setup of the time types. If you enter one or more time types for a given setID, all PeopleSoft FieldService business units that use that setID as the default setID inherit the time types of the setID, including the billable option. You can, however, override time types for a business unit.</p> <p>For example, suppose that the time type for Break is not set to billable on Time Types page, then the system does not display it in the Time Type section on this page.</p>

Tax Information

Use the fields on this tab to indicate where the order originated, where it will be accepted, and where the store is located. This information is used for tax purposes. The Order Origin Location, Order Acceptance Location, and Location fields prompt from the Location table (LOCATION_TBL), which is sent to PeopleSoft CRM through an EIP from PeopleSoft HCM and PeopleSoft FSCM.

Note. PeopleSoft Billing uses the fields in the Tax Information group box for integration to Vertex and Taxware, which are third-party tax vendors. Please refer to the setup for sales and use tax for third-party tax vendors for details on the function and behavior of each third-party tax field. These third-party tax fields are always blank when you first create a PeopleSoft FieldService business unit.

See Also

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, “Defining Business Units in PeopleSoft Integrated FieldService,” Defining FieldService Business Units

[Chapter 5, “Setting Up an Integration to PeopleSoft Transaction Billing Processor,” Setting Up Sales and Use Tax for Third-Party Tax Vendors, page 93](#)

Setting Up Billing Options for PeopleSoft Call Center

Access the Business Unit Billing Details page.

Business Unit Billing Details

Business Unit

COM01

Communications

Billing Information

On Demand Price By

Case

Currency Code

AUD

Australian Dollar

Rate Type

CRRNT

Current Rate

Contracts Business Unit

COM01

Communications

GL Business Unit

COM01

Communications

Bill Type

CA

CONTRACTS

Bill Source

SERVICE

Service

Tax Information

Order Origin Location

MAINHQ

GBAI Main Office - Headquarter

Order Acceptance Location

COMSHIP

California Shipping Location

Location

COMSHIP

California Shipping Location

Store Location

123 Main

OK

Cancel

Refresh

Business Unit Billing Details page

Billing Information

Use the fields within this group box to enter the information that is needed for the integration to PeopleSoft Transaction Billing Processor.

On Demand Price By	<p>Select either <i>Hour</i> or <i>Case</i>.</p> <p>This field provides the flexibility to price case transactions by hour or by case. For example, if you have a New York business unit and a California business unit, the New York unit could price a case by flat fee while the California unit could price the case by the total number of hours that an agent spends working on a case. This field is blank when you enter the page for the first time.</p>
Currency Code	<p>Enter the currency that you want to use for billing purposes for the business unit that you are defining.</p>
Rate Type	<p>Select the exchange rate type that is used to calculate monetary transaction amounts in alternate currencies.</p>
Contracts Business Unit	<p>Enter the contracts business unit that you want to use for billing.</p>
GL Business Unit	<p>Enter the general ledger business unit that you want to use for billing.</p> <p>The prompt values for this field include all business units for all product lines. Populating this field enables mapping between the general ledger business unit and the call center business unit.</p> <p>The Case page does not display the general ledger business unit. It does display the contracts business unit, which appears by default from the agreement. When a case closes, the system sends the general ledger business unit, contracts business unit, and contract ID to PeopleSoft Transaction Billing Processor with other transaction information.</p>
Bill Type	<p>Select the bill type that you want associated with the business unit.</p> <p>The prompt values for this field include all bill type identifier codes that are sent from PeopleSoft Billing to PeopleSoft CRM. The bill type code is a user-defined value in PeopleSoft Billing. Sample data includes <i>SVC</i> (Service), <i>CASE</i>, and <i>CRM _ORDER</i>.</p>
Bill Source	<p>Enter the bill source that you want associated with the business unit.</p> <p>The Bill Source field prompts on all bill source identifier codes that are sent from PeopleSoft Billing to PeopleSoft CRM. The bill source code is a user-defined value in PeopleSoft Billing. Sample data includes <i>SERVICE</i>, <i>OES</i> (Order Entry System), and <i>GSO</i> (General Service Orders).</p>
<hr/> <p>Note. The system sends the Bill Type and Bill Source fields with every transaction if one or both have been set up on the Business Unit Billing Details page.</p> <hr/>	

See *PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook*, “Defining Call Center Business Units and Display Template Options,” Defining Call Center Business Units.

Tax Information

Use the fields on this tab to indicate where the order originated, where it will be accepted, and where the store is located. This information is used for tax purposes. The Order Origin Location, Order Acceptance Location, and Location fields prompt from the Location table (LOCATION_TBL), which is sent to PeopleSoft CRM through an EIP from PeopleSoft HCM.

Note. The fields in the Tax Information group box are used by PeopleSoft Billing for integration to Vertex and Taxware, which are third-party tax vendors. Please refer to the setup for sales and use tax for third-party tax vendors for details on the function and behavior of each third-party tax field. These third-party tax fields are always blank when you first create a business unit for a PeopleSoft call center application.

See Chapter 5, “Setting Up an Integration to PeopleSoft Transaction Billing Processor,” Setting Up Sales and Use Tax for Third-Party Tax Vendors, page 93.

Setting Up Billing Options for PeopleSoft Order Capture

Access the Order Capture Definition - Internal page.

Internal Self Service

Business Unit COM01

*Description Communications

*Short Description COM01

*Status Open

☐ Default Business Unit

☐ Submit Confirmation

Business Unit

FieldService COM01

Marketing COM01

Order Management COM01

Proposal Management

Contracts

General Ledger

Tax Settings

*Tax Vendor None Test Tax Interlink

Company PSFT

Order Origin California Shipping Location

Division

Order Acceptance California Shipping Location

Store Location

Order Capture Definition - Internal page (1 of 3)

Order Capture	
*Freight Vendor	None Test Freight
Ship From	California Shipping Location
Preferred Carrier	UPS 2nd Day Air
Quote Conversion Warning	No Warning
*Site Address Includes	Customer Bill To Addresses
Fulfillment Specialist Email	
Catalog Refresh (Minutes)	
Bill Type Identifier	
Default Service Duration	Months
*Card Vendor	None
Source	Phone
Capture Priority	
Base Currency	US Dollar
Rate Type	Average
Credit Rating Value	
Quote Valid For	30 Days Quote Due 10
Bill Source	
Quote Conversion	Convert to Order and Subm
Order Change Notifications	
Accepted	Notify Nobody
Partially Accepted	Notify Nobody
Rejected	Notify Nobody
Advisor Dialogs	
<input type="checkbox"/> Display Session Information	
Bulk Order	
Consumer Hierarchy	CONS_HIERARCHY
Organization Hierarchy	CUST_HIERARCHY
<input checked="" type="checkbox"/> Multiple Orders Per Recipient	

Order Capture Definition - Internal page (2 of 3)

Catalog Display Options	
<input checked="" type="checkbox"/> Display By Customer	Priority 2
<input checked="" type="checkbox"/> Display By Partner Contact	1
<input checked="" type="checkbox"/> Display By User	3
<input type="checkbox"/> Display Browse Catalog	
Modified 03/29/2004 9:21AM PST KBELL	

Order Capture Definition - Internal page (3 of 3)

To set up billing options for PeopleSoft Order Capture, you must establish values for the Contracts, General Ledger, Bill Type, Bill Source, and Default Service Duration fields.

Contracts

Enter the contracts business unit that you want to use for billing.

General Ledger

Enter the general ledger business unit that you want to use for billing. The prompt values for this field include all business units for all product lines. Populating this field enables mapping between the general ledger business unit and the order capture business unit.

Bill Type

Select the bill type that you want associated with the business unit.

The prompt values for this field include all bill type identifier codes that are sent from PeopleSoft Billing to PeopleSoft CRM. The bill type code is a user-defined value in PeopleSoft Billing. Sample data includes *SVC* (Service), *CASE*, and *CRM_ORDER*.

Bill Source

Enter the bill source that you want associated with the business unit.

The Bill Source field prompts on all bill source identifier codes that are sent from PeopleSoft Billing to PeopleSoft CRM. The bill source code is a

user-defined value in PeopleSoft Billing. Sample data includes *SERVICE*, *OES* (Order Entry System), and *GSO* (General Service Orders).

Note. The system sends the Bill Type and Bill Source fields with every transaction if one or both have been set up on the Business Unit Billing Details page.

Default Service Duration Enter the default duration for service products. This is used to calculate the service end date for service products ordered through order capture by adding the duration to the service start date. The duration specified in the order capture business unit is used when the duration on the product definition is blank.

For more information on setting up billing options, refer to the *PeopleSoft Order Capture 8.9 PeopleBook*.

See Also

PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook, “Defining PeopleSoft Order Capture Business Units”

Defining Tax Parameters

Access the Tax Parameter Definitions page.

See Also

[Chapter 5, “Setting Up an Integration to PeopleSoft Transaction Billing Processor,” Page Used to Set Up Sales and Use Tax for Third-Party Tax Vendors, page 94](#)

Working with On Demand Billing

This section provides an overview of on demand billing and discusses how to set up PeopleSoft Transaction Billing Processor to process on demand billing transactions.

Understanding On Demand Billing

This section discusses:

- Overview
- Setup
- Contract creation and processing
- Integration points
- Error handling

Note. On Demand billing is specific to PeopleSoft CRM FieldService and CRM Support.

Overview

On demand billing provides back office processing for one-time fee transactions for service orders and cases. These transactions are not linked to agreements. The fees are usually one-time fees that are billed to the customer. Through an integration with PeopleSoft Transaction Billing Processor, you can bill and book revenue for on demand service fees for cases and service orders.

Note. PeopleSoft CRM enables the system to bill on demand transactions through PeopleSoft Transaction Billing Processor. The same messages and interface tables are used. Revenue recognition for on demand transactions is managed by PeopleSoft Billing through the Contracts Billing Interface (CA_BI_INTFC) process.

Here is an overview of the on demand functionality:

- Through PeopleSoft Contracts, On Demand cases and service orders are processed through PeopleSoft Transaction Billing Processor and General Ledger for billing and revenue.
- PeopleSoft CRM identifies a transaction as on demand when passing the transaction from PeopleSoft CRM to PeopleSoft Transaction Billing Processor.
- Closure of a service order or case in PeopleSoft CRM triggers the sending of transaction information from PeopleSoft CRM to PeopleSoft Transaction Billing Processor.

PeopleSoft CRM determines whether a new contract is created or if an existing contract is used based on the sold to customer. PeopleSoft CRM requests one on demand contract per sold to customer and PeopleSoft Contracts business unit mapping.

- PeopleSoft Transaction Billing Processor launches the revenue and billing processes immediately after the on demand transaction loads into the contract staging table (INTERFACE_CA) without any manual intervention.
- If a failure occurs during the creation of the contract or during processing of the on demand transaction, the system does not create the contract or process the transaction. The system sends an error message to PeopleSoft CRM with the failure reason. In this case you must resubmit the transaction.

Note. In PeopleSoft Transaction Billing Processor there is no visibility to on demand contract lines in any components, processes, or reports. Deferred revenue is not applicable for on demand transactions

Setup

To implement on demand transaction processing, you must set up:

- PeopleSoft Contracts business units.
- Contract statuses
- Accounting definitions.
- Accounting rules.
- Billing plan detail template (optional).

Prior to creating on demand contracts, set up the contract business unit and contract status. Additionally, you must set up the accounting rules for on demand transactions to ensure that the system allows only one *REV* row per transaction. You must also select the Transaction Billing check box on the Installed Products page.

You have the option to create a billing plan detail template to populate or override the fields on the billing plan. Select the billing plan detail template on the Contract Definition - BU Options page. If you select a template on this page, the billing plan detail template populates or overrides the corresponding fields on the billing plan when the billing plan is created.

Contract Creation and Processing

PeopleSoft FieldService and Support send one-time fee transactions to PeopleSoft Transaction Billing Processor to utilize the contracts functionality to bill and book revenue. PeopleSoft Transaction Billing Processor initiates billing processing and completes both revenue and billing processing for on demand transactions.

Here are the steps that the system completes to create and process on demand transactions through PeopleSoft Transaction Billing Processor.

1. If the service order or case is not covered by an agreement, the system sends the transaction to PeopleSoft Transaction Billing Processor as an on demand transaction when a PeopleSoft CRM Support case or FieldService service order is closed.
2. The first time PeopleSoft CRM creates an on demand service order or case, the system searches for the sold to customer or PeopleSoft FieldService or Support business unit to map to the PeopleSoft Contracts business unit and contract number.

If the search does not find a mapping, PeopleSoft CRM sends a contract request message (CONTRACT_REQUEST) to PeopleSoft Transaction Billing Processor to create a new on demand contract. PeopleSoft CRM sends a contract request message only when the system needs to create a new contract. The request message from PeopleSoft CRM specifies the transaction type (service order or case).

3. PeopleSoft Transaction Billing Processor creates an on demand contract and sends a contract response message (CONTRACT_RESPONSE) to PeopleSoft CRM providing the contract business unit, contract number, contract line number, error status, and error message.

The system creates the contract and contract lines, including an *As-incurred* billing plan, using the CA_HDR_CI component interface. On success, PeopleSoft Transaction Billing Processor responds to PeopleSoft CRM with the new contract number.

4. On receipt of the contract response message, PeopleSoft CRM sends the transaction to PeopleSoft Transaction Billing Processor through a transaction message (CONTRACT_TXN) with all necessary data for the invoicing and booking revenue.

In the transaction message, the contract number identifies a particular contract. Each transaction is unique and is marked by its own transaction ID (CA_TXN_ID). For all future transactions for the same sold to customer, only the transaction (through the transaction message) is sent to PeopleSoft Transaction Billing Processor.

5. PeopleSoft Transaction Billing Processor retrieves the transaction data and loads the on demand transaction from PeopleSoft CRM into the contract staging tables (INTFC_CA).

Loading the contract staging tables triggers both the revenue process to apply the revenue to the appropriate account and billing process to generate the invoice to run. The transaction populates the contract interface tables, initiates the Billing Interface process (CA_BI_INTFC), and prepares the transaction for billing processing. Revenue recognition is handled by PeopleSoft Billing.

If there are errors during processing, the system sends a reply message to PeopleSoft CRM containing the contract business unit, contract number, contract line number, CRM identifier, and status indicating that the process failed.

If the transaction posts successfully to both PeopleSoft General Ledger and PeopleSoft Billing, the system sends a reply message to PeopleSoft CRM containing the contract business unit, contract number, contract line number, CRM identifier, and status indicating that the process succeeded. The response message is CONTRACT_RESPONSE for both request and transaction messages and it contains the appropriate success and failure codes and descriptions.

6. The CRM transaction changes the billing status from *submitted* to *completed*. This action marks the end of the PeopleSoft CRM processing.
7. PeopleSoft Billing runs the Billing Interface and Finalization processes.

Integration Points

These are the four major steps in the integration process between PeopleSoft CRM and PeopleSoft Contracts for on demand contracts:

1. Creating a billing plan.
2. Creating a contract.
3. Populating the Contracts interface tables.
4. Processing billing.

Creating a billing plan, creating a contract, and populating the interface table are the same steps that occur with agreement-based processing. These steps use the contract request (CONTRACT_REQUEST and CONTRACT_RESPONSE) and transaction (CONTRACT_TXN) messages. The last step, processing billing, differs from agreement-based transactions since billing for on demand contracts takes place immediately through PeopleSoft Billing.

With agreement-based billing, you have control over the billing plan in PeopleSoft Contracts and you can make changes to the contract before it goes to PeopleSoft Billing for processing. The on demand process uses the same integration points as agreement based transactions.

Error Handling

Errors can occur during the contract and billing plan creation process, when the system loads the staging table, or when the system runs the revenue and billing processes. PeopleSoft Transaction Billing Processor initiates billing processing and sends the transactions to PeopleSoft Billing. PeopleSoft Billing completes both the revenue and billing processing for on demand transactions.

Here is how the system handles errors:

- If a failure occurs during contract creation, the system creates the contract in a *cancelled* status and a response is sent back to PeopleSoft CRM with a message stating the nature of the error.

Once you correct the error manually, you must resubmit the transaction.

- If a contract was successfully created and is ready for billing, but the transaction fails to populate the contract interface tables, the transaction is not created and the response message sends an error message back to PeopleSoft CRM stating the cause of the error.

Once you correct the problem manually, you must resubmit the transaction. PeopleSoft CRM resubmits only the Contract Transaction message since the contract has already been created.

- If there are errors triggered during the revenue or billing processes, both processes send a response message back to PeopleSoft CRM with the failure and message.

Once you correct the problem manually, you must resubmit the transaction. PeopleSoft CRM resubmits only the Contract Transaction message since the contract has already been created.

Setting Up On Demand Transactions

This section discusses how to set up on demand transactions in PeopleSoft Financials and Supply Chain Management.

Pages Used for Setting Up On Demand Transactions

Page Name	Object Name	Navigation	Usage
Installation Options - Installed Products	INSTALLATION_FS	Set Up Financials/Supply Chain, Install, Installation Options Click the Products link in the General Options group box.	Select the Contracts Transaction Billing check box to indicate that this product is installed on the system. <i>See PeopleSoft Financials, Enterprise Service Automation and Supply Chain Management Application Fundamentals 8.8 PeopleBook, "Setting Installation Options for PeopleSoft Applications"</i>
Contracts Definition - BU Definition	BUS_UNIT_TBL_CA	Set Up Financials/Supply Chain, Business Unit Related, Contracts, Contracts Definition, BU Definition	Create a new PeopleSoft Contracts business unit definition or manage an existing business unit. <i>See PeopleSoft Contracts 8.8 PeopleBook, "Defining PeopleSoft Contracts Business Units"</i>
Contracts Definition - BU Options	BUS_UNIT_OPT_CA	Set Up Financials/Supply Chain, Business Unit Related, Contracts, Contracts Definition, BU Options	Select a bill plan template ID to use to override the fields on the billing plan (optional). If you select a template on this page, when the billing plan is created, the billing plan detail template overrides the corresponding fields on the billing plan. <i>See PeopleSoft Contracts 8.8 PeopleBook, "Defining PeopleSoft Contracts Business Units"</i>
Contract Status	CA_STATUS_PNL	Set Up Financials/Supply Chain, Product Related, Contracts, General Options, Contract Status	Define contract statuses and map them to processing statuses. The system uses the contract status to control all processing that can occur against a contract. <i>See PeopleSoft Contracts 8.8 PeopleBook, "Structuring Contracts"</i>

Page Name	Object Name	Navigation	Usage
CRM Accounting Rules	CA_ACCT_CRM	Customer Contracts, Create and Amend, CRM Acct Distribution	<p>Define the accounting rules to apply to PeopleSoft CRM transactions. Set up the accounting rules for on demand transactions to ensure that the system allows only one <i>REV</i> row per transaction</p> <p>See <i>PeopleSoft Transaction Billing Processor 8.9 PeopleBook</i>, “<i>Setting Up PeopleSoft Transaction Billing Processor</i>”</p>

Setting Up Sales and Use Tax for Third-Party Tax Vendors

This chapter provides an overview of the tax setup for third-party tax vendors and discusses how to set up sales and use tax for third-party tax vendors. To enter sales and use tax, use the Tax Parameters (RF_TAX_PARAM) component. To load data into the tables for this component, you can also use the RF_TAX_PARAM component interface.

Understanding Tax Setup for Third-Party Tax Vendors

Use the Tax Parameter Definitions page to integrate with third-party tax vendors, such as Taxware or Vertex. The system passes the values in the fields that appear on the page to PeopleSoft Transaction Billing Processor with every PeopleSoft CRM transaction and uses the values during invoice finalization when the taxes are calculated.

For Sales and Use Tax, there are two ways of calculating the taxes on PeopleSoft Billing side, either the third-party tax calculations or PeopleSoft internal tax calculation. Basically, the tax code and the address overrides are used for calculating taxes through PeopleSoft internal system.

The data required for internal tax calculations is sent through the integration with PeopleSoft Transaction Billing Processor. If the Billing business unit on the SCM side is configured for PeopleSoft internal tax calculation, it calculates the taxes. It is basically the tax code.

You can define fields for each type of transaction (agreement fees, service order fees, and case fees) independent of each other. Use the fields listed in the next section only if you have a third-party integration with either Taxware or Vertex.

See Also

PeopleSoft Integration Broker

PeopleSoft Integration Tools and Utilities

PeopleSoft Business Interlink Application Developer Guide

Common Elements Used in This Section

Product Tax Group

Use to identify special tax-related charge information associated with individual transaction lines. For example, suppose that you are selling

computers, a computer for the hearing impaired might receive a better rate for a laptop than a computer that doesn't have a feature for the hearing impaired.

The values for this field come from the Product Group table. You may, however, enter free-form values. This is not a required field, so you may leave it blank.

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

Note. These values should match the values defined by either Taxware or Vertex. As the administrator, you must enter the values accurately, because there is no interface to verify that the tax group is a valid Taxware product code or Vertex product group.

- Transaction Type

Determines how a vendor can calculate taxes. For example, the State of Illinois charges a six percent sales tax for purchases. This field includes these translate values: *Rental*, *Sales*, and *Service*. It is not a required and may be left blank.
- Transactions Sub Type

Use for reporting purposes with the Vertex product only. This field is tied to the Transaction Type field and has predefined translate values that include *Expense*, *Freight*, *Misc*, *None*, *Property*, *Rental*, and *Service*. It is not required and may be left blank.

Page Used to Set Up Sales and Use Tax for Third-Party Tax Vendors

Page Name	Object Name	Navigation	Usage
Tax Parameter Definitions	RF_TAX_PARAM	Set Up CRM, Common Definitions, Tax Parameter Definition, Tax Parameter Definition	Set up sales and use taxes for service, material, labor, expenses, and cases for third-party tax vendors.

Setting Up Sales and Use Tax for Third-Party Tax Vendors

Access the Tax Parameter Definitions page.

Tax Parameter Definitions

SetID CRM01

[Service](#) [Material](#) [Labor](#) [Expense](#) [Support](#) [All](#)

Service Sales and Use Tax

Customize | Find | View All | First 1-2 of 2 Last

*Service Type	Service ID	Service	Product Tax Group	Transaction Type	Transaction Sub Type	
Repair	APP0000006	Repair A/C	A/C	Service	Service	
PM	APP0000001	PM for A/C	A/C	Sale	Expense	

Add Service Sales and Use Tax

Material Sales and Use Tax

Customize | Find | View All | First 1 of 1 Last

Item Group	Item ID	Product Tax Group	Transaction Type	Transaction Sub Type	
AIR CONDITIONER	10009	A/C	Sale	None	

Add Material Sales and Use Tax

Labor Sales and Use Tax

Customize | Find | View All | First 1 of 1 Last

*Cost Category	Product Tax Group	Transaction Type	Transaction Sub Type	
Travel	A/C	Service	None	

Add Labor Sales and Use Tax

Tax Parameter Definitions page (1 of 2)

Expense Sales and Use Tax

Customize | Find | View All | First 1 of 1 Last

*Expense Type	Product Tax Group	Transaction Type	Transaction Sub Type	
Mileage	A/C	Service	None	

Add Expense Sales and Use Tax

Support Sales and Use Tax

Customize | Find | View All | First 1 of 1 Last

*Product	*Case Type	Source	Product Tax Group	Transaction Type	Transaction Sub Type	
Air Cond, Control Un	Service Re	PHONE	A/C	Service	None	

Add Support Sales and Use Tax

Save
 Refresh
 Add
 Update/Display

Tax Parameter Definitions page (2 of 2)

Service Sales and Use Tax

Select the service type and service ID for which you want to enter tax information. To add additional rows of information, click the Add Service Sales and Use Tax button.

Material Sales and Use Tax

Select the item group and item ID for which you want to enter tax information. To add additional rows of information, click the Add Material Sales and Use Tax button.

Labor Sales and Use Tax

Select the cost category for which you want to enter tax information. To add additional rows of information, click the Add Labor Sales and Use Tax button.

Expense Sales and Use Tax

Select the expense type for which you want to enter tax information. To add additional rows of information, click the Add Expense Sales and Use Tax button.

Support Sales and Use Tax

Select the product and case type for which you want to enter tax information. To add additional rows of information, click the Add Support Sales and Use Tax button.

PART 4

ESRI Integration

Chapter 6 **Setting Up ESRI Integration**

CHAPTER 6

Setting Up ESRI Integration

This chapter provides an overview of geographical information systems, Environmental Systems Research Institute (ESRI) integration, ESRI processes, and discusses how to:

- Set up transactions and transaction connectors.
- Set up relationships and transaction modifiers.
- Set up integration flags.
- Set up ESRI integration.
- Access the Map Dashboard.
- View the Map Dashboard.
- View geocode errors.

Understanding Geographical Information Systems

ESRI is a geographical information system (GIS) and mapping software solution. Using ESRI's mapping and GIS software you can spatially enable the data. The GIS can be an effective way to explain events, predict outcomes, or plan strategies.

The cornerstone of GIS is location information. Addresses are actually the most common form of location information. An address specifies a location in much the same way as a geographic coordinate does. But, addresses are merely text strings containing a house number, street name, direction, and postal code. The GIS needs a mechanism to calculate their geographic location coordinates, such as, latitude and longitude, before you can display them on a map.

Use address geocoding to display tabular data containing addresses as points on a map.

Use geocodes and ESRI mapping functionality to generate incident-related maps that are tailored to your business needs. For example, using this functionality, you can show:

- Incidents or cases of the same type on a map.
- All types of incidents in a given area.

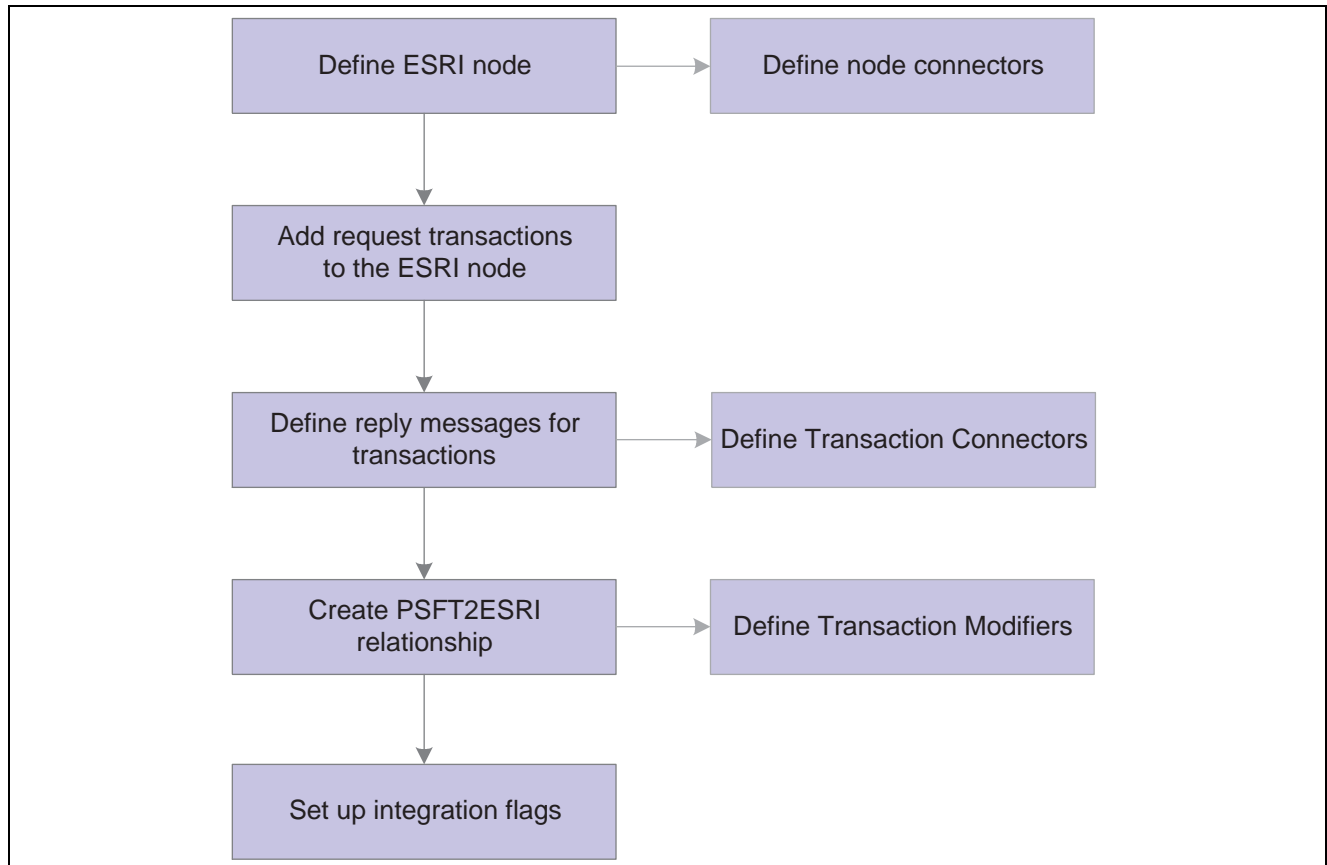
Note. For information on installing the ESRI software, refer to the installation documentation that was provided by ESRI when you purchased the ESRI software. PeopleSoft does not provided this documentation.

Understanding ESRI Integration

. Setting up ESRI integration is a two-step process. You will initially set up Integration Broker for geocode, map extent, and map integrations. Then you will set up the integration with ESRI for map and query definitions.

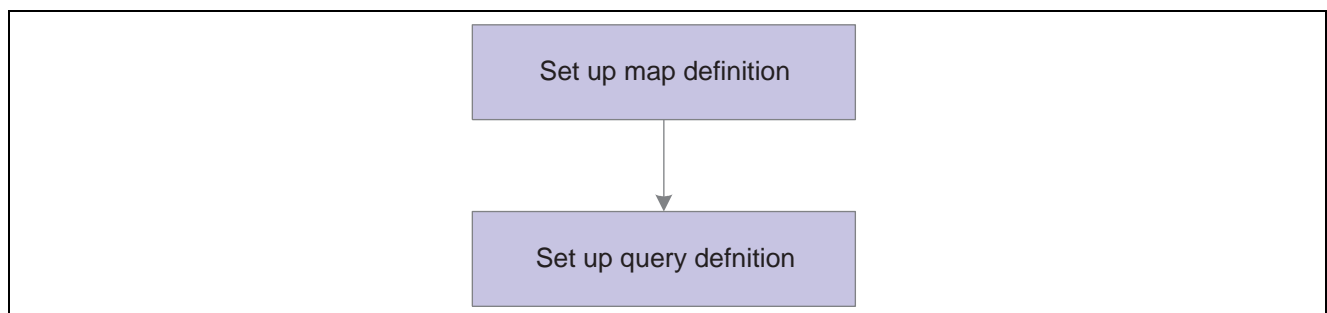
Note. PeopleSoft CRM integrates with ArcIMS 4.0. ArcIMS provides the foundation for distributing high-end geographic information systems (GIS) and mapping services using the internet. ArcIMS software enables users to integrate local data sources with internet data sources for display, query, and analysis in an easy-to-use Web browser.

This graphic illustrates the steps that you will follow to set up Integration Broker for the ESRI integration:



Integration Broker setup

This graphic illustrates the steps you will follow to set up the ESRI integration:



ESRI integration setup

Understanding ESRI Processes

Once ESRI is installed and you have set up the integrations, there are three processes that take place on an ongoing basis: geocode retrieval, updating map service information, and map generation.

This section discusses the processes and defines the enterprise integration points (EIP) for each.

Geocode Addresses

PeopleSoft CRM stores geocodes for all consumer and company addresses, case addresses or locations, and service order addresses or locations. You can enter either an absolute address, which requires address and the postal code, or an intersection, which requires two cross streets and an optional postal code.

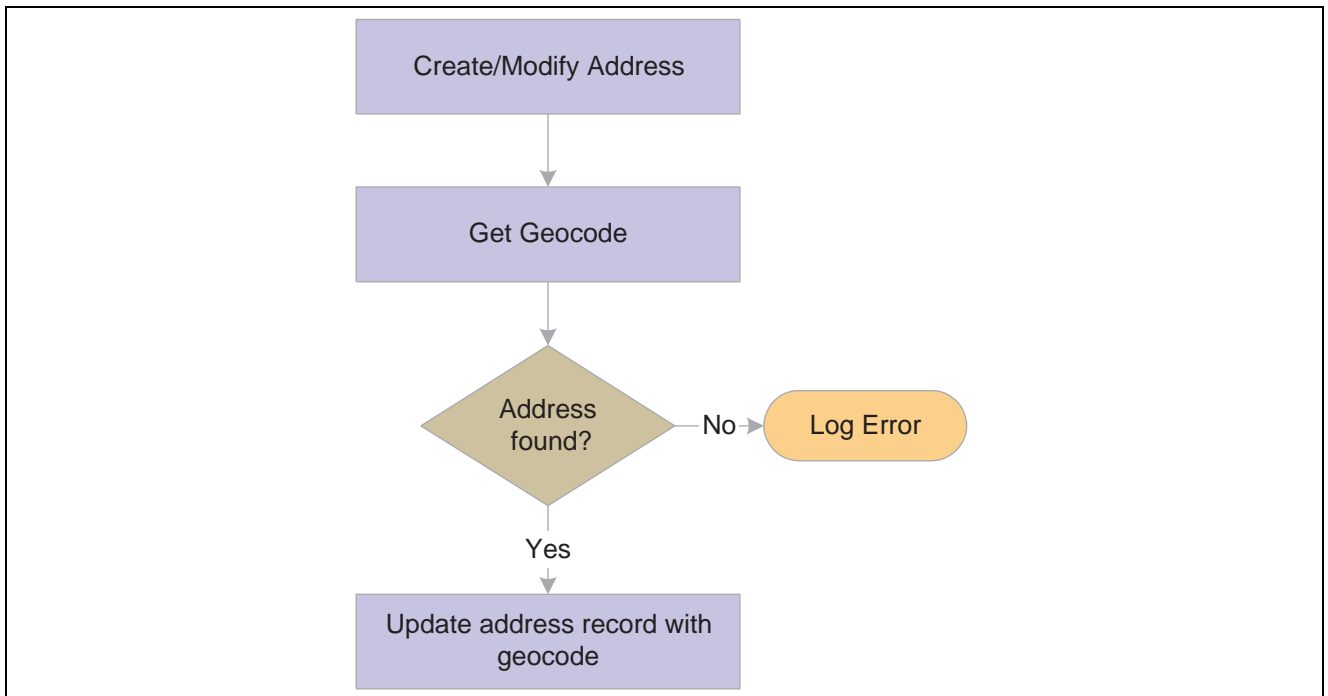
Geocoding is available for US addresses only.

Note. The Geocode Integration Flag on the Installation Options page must be turned on to enable geocode address functionality.

You have two options for obtaining geocode addresses:

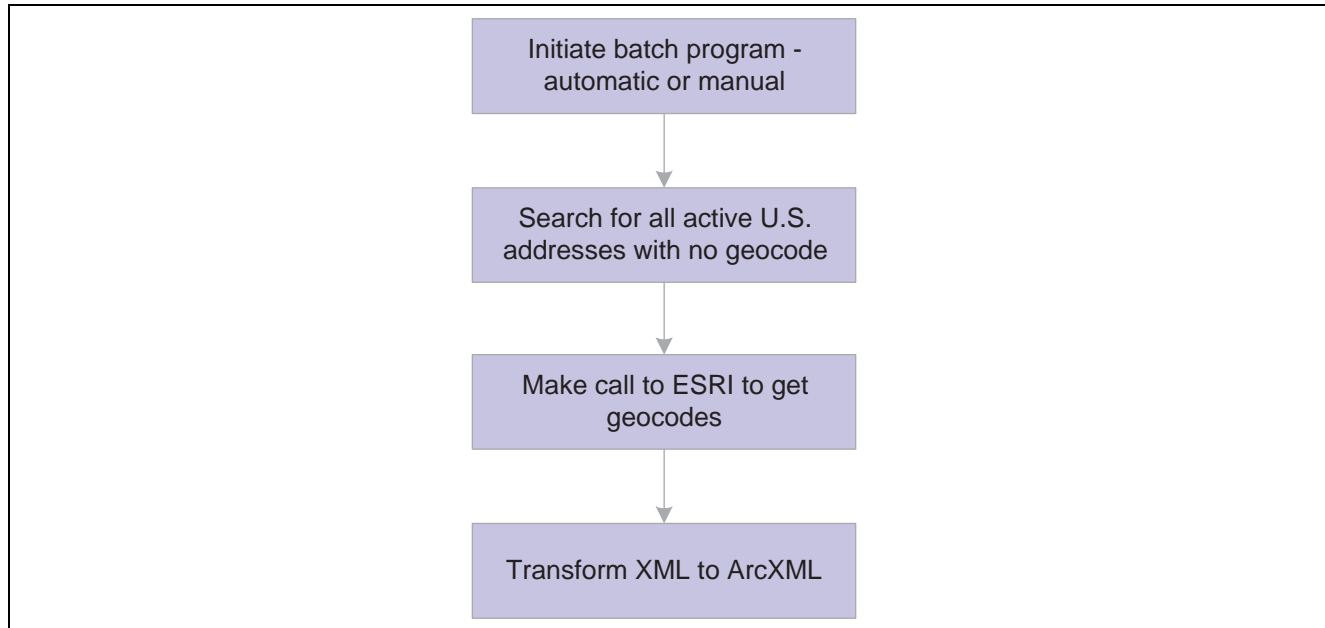
- Synchronous, realtime connection with ESRI.
- Scheduled batch job that runs periodically.

You can obtain geocodes from ESRI in synchronous realtime. When you create or modify an address, the system calls ESRI to get the geocode. If the geocode is found, the system updates the address record with the geocode. If no geocode is found, the system logs an error.



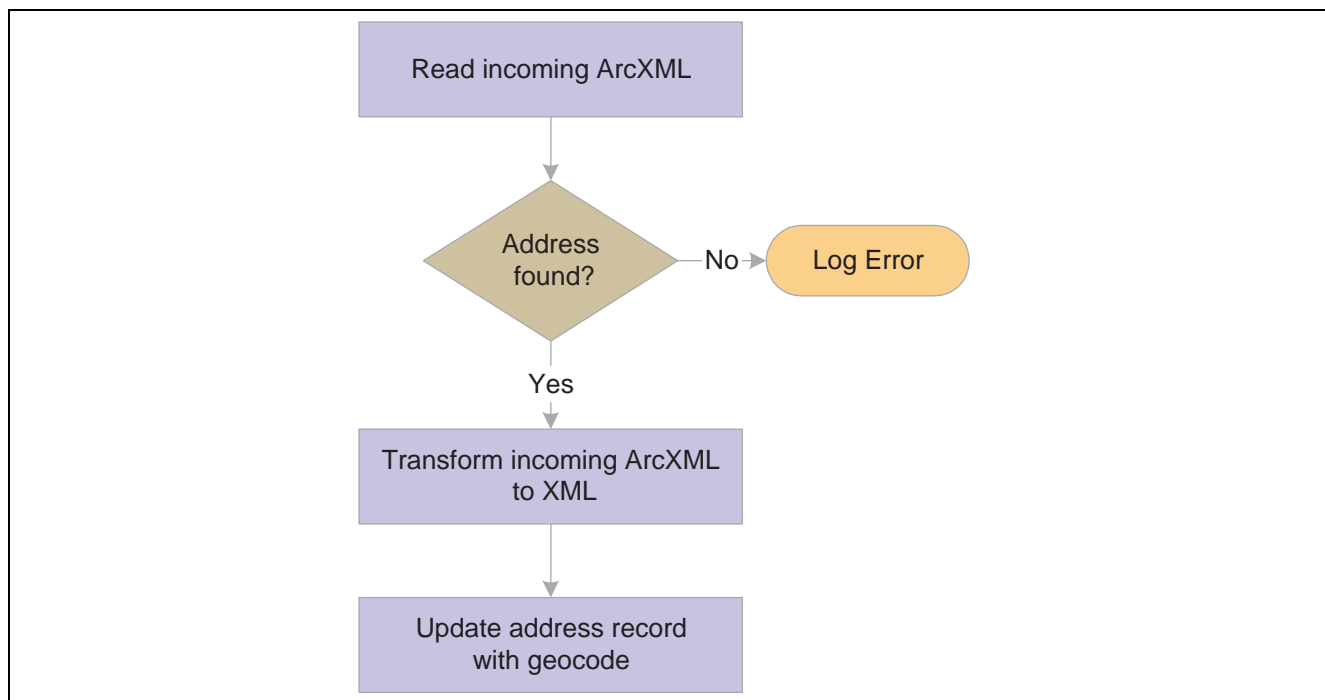
Request process flow for synchronous geocode addresses

Geocodes for addresses can be obtained by a scheduled job that runs periodically. When you first set up the system, use this method to retrieve geocodes for addresses. You can also run this process periodically to pick up any addresses that do not have geocodes. The address record is updated with geocodes obtained from the ESRI system. The system transforms the address or intersection information from XML to ArcXML and sends it to ESRI. This graphic illustrates the outbound process flow for obtaining geocode addresses using a batch process:



Request process flow for batch geocode addresses

ESRI publishes the geocode for the address or intersection. If no geocode is found, an error is logged. If a corresponding geocode is found, the PeopleSoft system transforms the incoming ArcXML sent by ESRI to XML. The address record is updated with the geocode. This graphic illustrates the inbound process flow for geocode retrieval.



Reply process flow for geocode addresses

The RBG_GEO_CODE_US channel is used for the PeopleSoft ESRI integration. This table lists the EIPs for geocode retrieval:

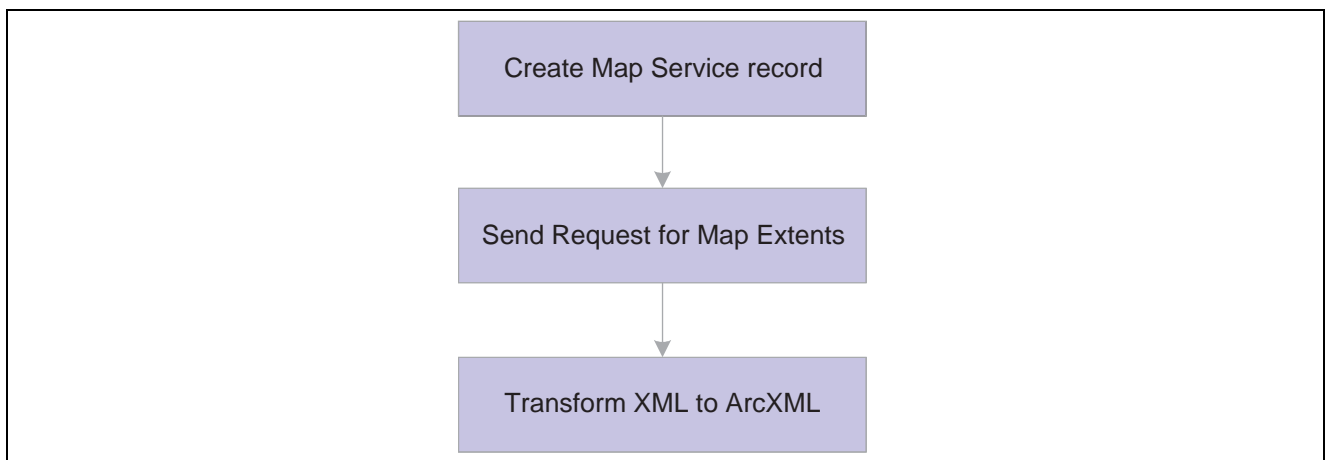
EIP Name	Description	Message Name	Direction of Integration	Technology
Request Message Definition	Address information	RBG_SYNC_ADDRESS_US_MSG	CRM —> ESRI	Integration Broker
Reply Message Definition	Geocode for the requested address	RBG_SYNC_GEO_CODE_US_MSG	ESRI —> CRM	Integration Broker

Map Service Information

Each map that is available in the system is called a map service. You can use one map or a number of different maps, depending on your business needs. For example, suppose that you need to access a city map, a state map, and a map of the United States. There is no restriction to the number of map services to which you can subscribe.

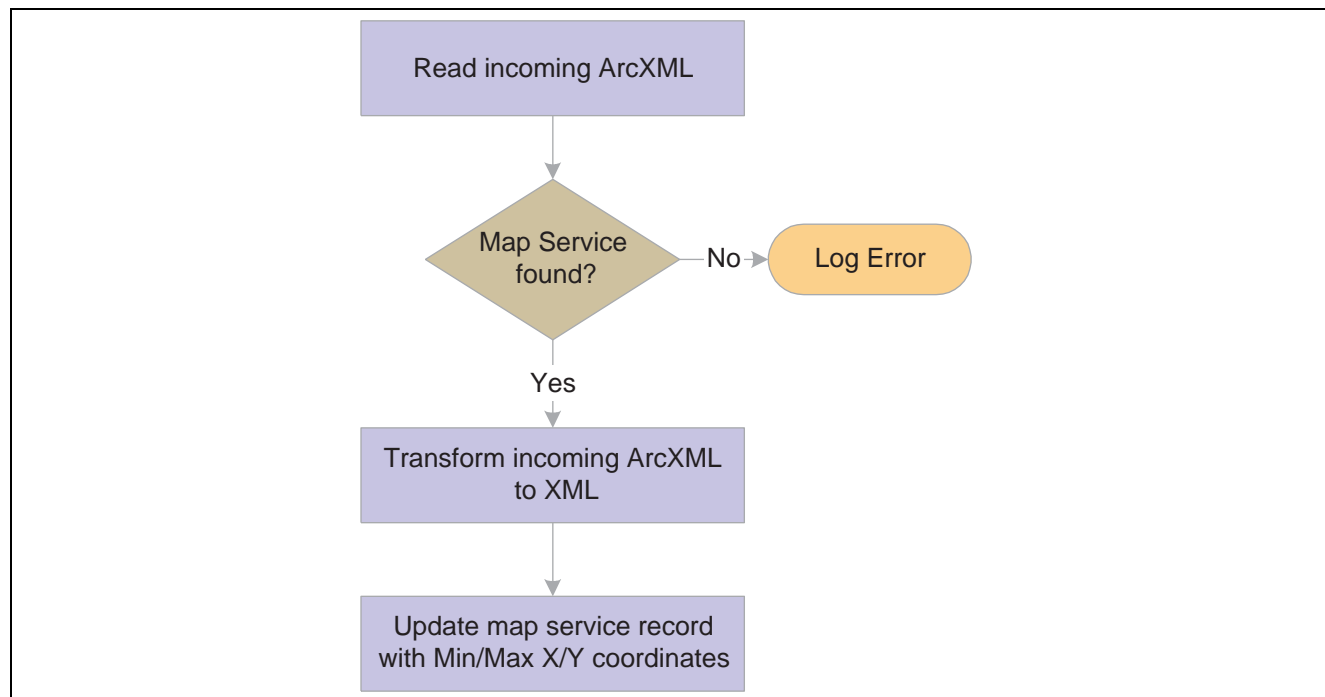
In addition to setting up the map services to which you have subscribed, ESRI defines the minimum and maximum extents to be used when zooming in and out on the Map Dashboard.

You create the map service record in the Map Definition component. PeopleSoft transforms the XML to ArcXML and sends the map service information to ESRI. This graphic illustrates the outbound process flow for map service information.



Request map service information process flow

ESRI sends the map service information and PeopleSoft reads the incoming ArcXML. If the map service is found, PeopleSoft transforms the ArcXML to XML and updates the map service record with the minimum and maximum extents. The minimum and maximum X and Y coordinates appear on the Map Definition page. This graphic illustrates the inbound process flow for updating the map service record:



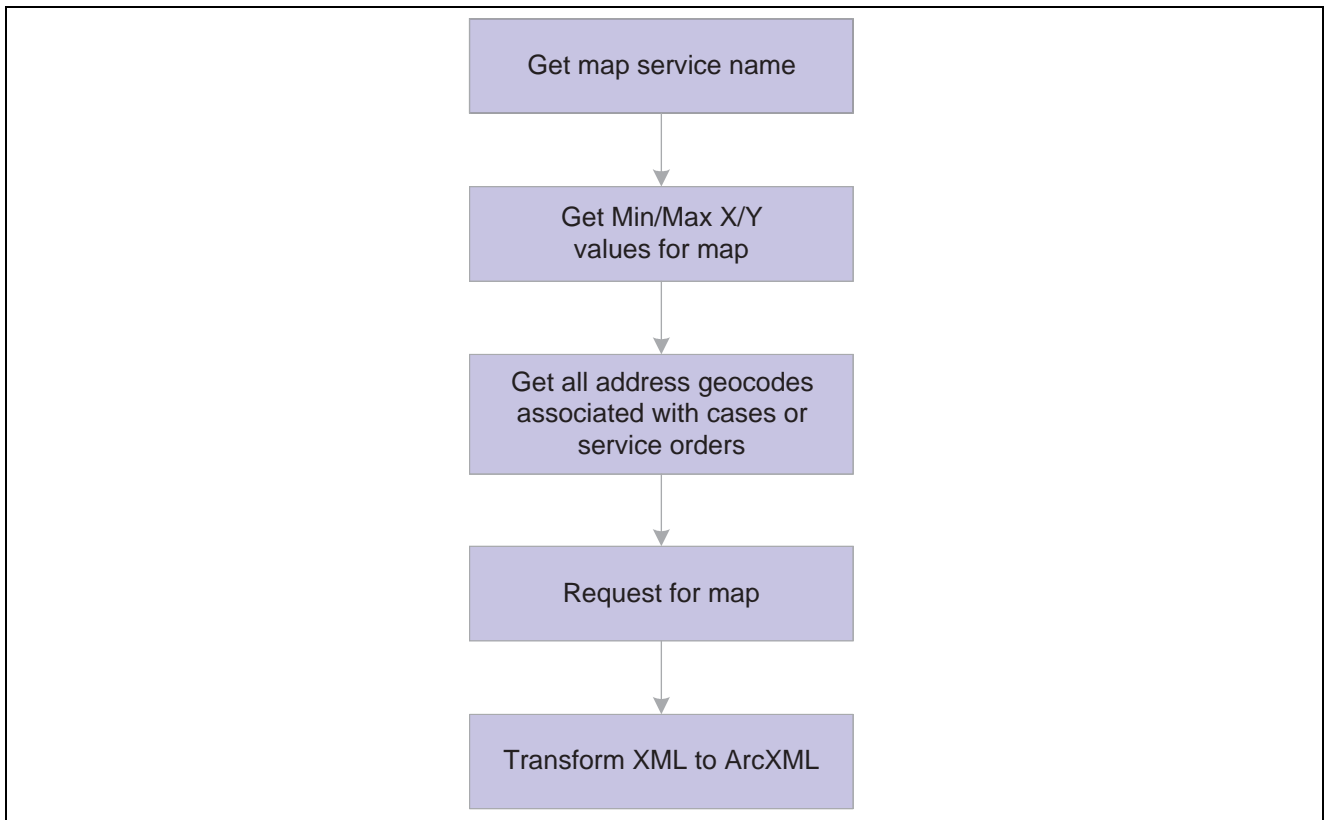
Reply map service information process flow

The RBG_GEO_CODE_US channel is used for the PeopleSoft ESRI integration. This table lists the EIPs for map service information:

EIP Name	Description	Message Name	Direction of Integration	Technology
Request Message Definition	Service map information to obtain map coordinates from ESRI	RBG_MAP_EXT_REQ_MSG	CRM —> ESRI	Integration Broker
Reply Message Definition	Minimum/Maximum X/Y coordinates of the service map	RBG_MAP_EXT_REP_MSG	ESRI —> CRM	Integration Broker

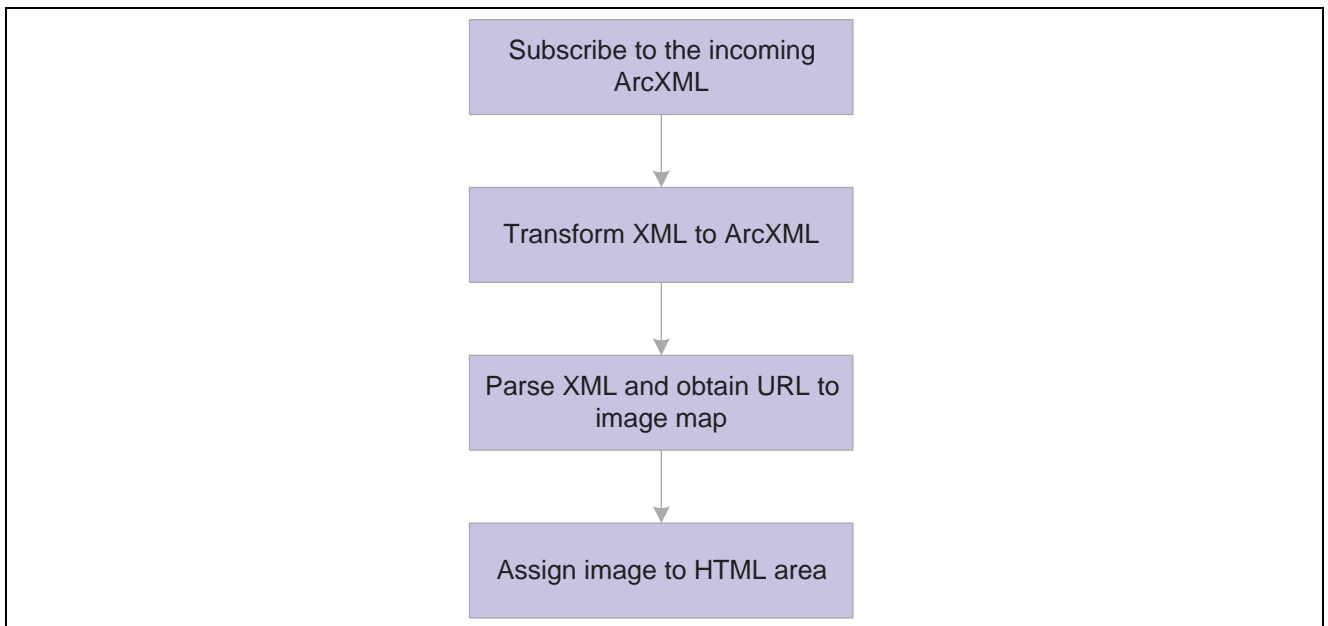
Map Generation

This integration is used to send a list of geocodes from either a case or service order search. A request XML is sent to the ESRI system to generate a map with geocodes that appear as dots. PeopleSoft gets the map service name, the minimum and maximum extents for the map, and all address geocodes associated with cases or service orders. PeopleSoft sends the message in ArcXML. This graphic illustrates the outbound process flow for generating the map:



Request map generation process flow

The ESRI system responds with a URL to the image map based on the map service and geocodes. The map appears on the PIA page. This graphic illustrates the outbound process flow for generating the map:



Reply map generation process flow

The RBG_GEO_CODE_US channel is used for the PeopleSoft ESRI integration. This table lists the EIPs for map generation:

EIP Name	Description	Message Name	Direction of Integration	Technology
Request Message Definition	Service map information and list of geocodes to be displayed on the map	RBG_MAP_REQ_MSG	CRM —> ESRI	Integration Broker
Reply Message Definition	URL to the generated image map	RBG_MAP_RES_MSG	ESRI —> CRM	Integration Broker

Setting Up the Transactions and Transaction Connectors

PeopleSoft CRM uses Integration Broker to send and receive messages for the ESRI integration. Before setting up the integrations for the geocode, map extent, and map integrations, read the *PeopleSoft Integration Broker PeopleBook*. This section does not provide details on Integration Broker; instead, it provides directions for setting up the geocode, map extent, and map integrations.

This section discusses how to:

- Define the ESRI node.
- Create transactions.
- Create transaction connectors.

See Also

PeopleSoft Integration Broker PeopleBook

Pages Used to Set Up the Connectors

Page Name	Object Name	Navigation	Usage
Node Definitions	IB_NODE	PeopleTools, Integration Broker, Node Definitions, Node Definitions	Define the ESRI node.
Transactions	IB_NODETRXLIST	PeopleTools, Integration Broker, Node Definition, Transactions	Add transactions to the ESRI node.
Transactions (Detail)	IB_NODETRX	<ul style="list-style-type: none"> Click the Add Transaction button on the Transactions page. Click the Edit link next to an existing transaction on the Transactions page. 	Define the request messages for the transactions.
Messages	IB_NODETRXMSG	Click the Edit link next to an existing transaction on the Transactions page, and then select the Messages tab.	Define the reply messages for the transactions.
Connectors	IB_NODETRXCONN	Click the Edit link next to the appropriate transaction on the Transactions page. The system displays the Transaction (Detail) page. Select the Connectors tab.	Define node connectors for the ESRI transactions.

Defining the ESRI Node

Access the ESRI Node Definitions page.

The screenshot shows a web-based configuration interface. At the top, there are five tabs: 'Node Definitions' (selected), 'Contacts', 'Properties', 'Connectors', and 'Transactions'. Below the tabs, the 'Node Name' is set to 'ESRI'. The 'Details' section contains the following fields:

- *Description**: Portal Node - ESRI
- Default Local Node**: No
 - ☐ Local Node
 - ☒ Active Node
 - ☐ Non-Repudiation
- *Node Type**: External (dropdown)
- *Routing Type**: Explicit (dropdown)
- *Authentication Option**: None (dropdown)
- Hub Node**: [empty text box] with a search icon
- Master Node**: [empty text box] with a search icon
- Company ID**: [empty text box]
- Image Name**: [empty text box] with a search icon
- Code Set Group Name**: [empty text box] with a search icon

At the bottom left, there is a 'Save' button with a floppy disk icon.

Node Definitions page

See Also

PeopleSoft Integration Broker PeopleBook

Creating Transactions

Access the Transactions and Messages pages.

Transactions

Messages

Node Name ESRI

Transaction Detail

Effective Date 03/17/2004

Transaction Type OutAsync

Request Message RBG_SYNC_ADDRESS_US_MSG

Request Message Version VERSION_1

***Status**

Active

Routing Type

Implicit

☐ **Override Connector**

Comment

[Return to Transaction List](#)

 Save

Transactions | [Messages](#)

Transactions page

Transactions Messages

Node Name ESRI

Transaction Messages Find | View All First 1 of 1 Last

Effective Date 03/17/2004

Status Active

Transaction Type OutSync

*Synchronous Logging No Logging

Request Message

Message Name RBG_SYNC_ADDRESS_US_MSG

Message Version VERSION_1

External Name

Response Message

Message Name RBG_SYNC_GEO_CODE_US_MSG

Message Version VERSION_1

External Name

[Return to Transaction List](#)

Save

Messages page

In the default ESRI node that you defined, you need to create a total of six transactions:

- Three outbound synchronous transactions for the geocode, map extent, and map integrations,
- Three outbound synchronous transactions that contain the transformed outbound message and transformed inbound reply message for the geocode, map extent, and map integrations

To add the outbound synchronous transaction for geocodes:.

1. Click the Add Transaction button on the Transactions page.
2. Select *Outbound Synchronous* as the transaction type on the Node Transactions page.
3. Select *RBG_SYNC_ADDRESS_US_MSG* as the request message.
4. Select *VERSION_1* as the request message version.

Click Add.

5. On the Transaction (Detail) page, select *Implicit* as the routing type.
6. Select the Messages tab.
7. Select *RBG_SYNC_GEO_CODE_US* as the response message name.
8. Select *VERSION_1*.

9. Click the Return to Transaction List link.

To add the outbound synchronous transaction to contain the transformed outbound and inbound reply message for geocodes:.

1. Click the Add Transaction button on the Transactions page.
2. Select *Outbound Synchronous* as the transaction type on the Node Transactions page.
3. Select *ESRI_ADDRESS_US_MSG* as the request message.
4. Select *VERSION_1* as the request message version.

Click Add.

5. Select *Implicit* as the routing type on the Transaction (Detail) page.
6. Select Override Connector.
7. Verify the gateway ID is *LOCAL* and the connector is *HTTPTARGET*.
8. Select the Messages tab.
9. Select *ESRI_GEO_CODE_US_MSG* as the response message name.
Select *VERSION_1*.
10. Click the Return to Transaction List link.

To add the outbound synchronous transaction for map extents:

1. Click the Add Transaction button on the Transactions page.
2. Select *Outbound Synchronous* as the transaction type on the Node Transactions page.
3. Select *RBG_MAP_EXT_REQ_MSG* as the request message.
4. Select *VERSION_1* as the request message version.

Click Add.

5. Select *Implicit* as the routing type on the Transaction (Detail) page.
6. Select the Messages tab.
7. Select *RBG_MAP_EXT_REPLY_MSG* as the response message name.
Select *VERSION_1*.
8. Click the Return to Transaction List link.

To add the outbound synchronous transaction to contain the transformed outbound and inbound reply message for map extents:.

1. Click the Add Transaction button on the Transactions page.
2. Select *Outbound Synchronous* as the transaction type on the Node Transactions page.
3. Select *ESRI_MAP_EXT_REQ_MSG* as the request message.
4. Select *VERSION_1* as the request message version.

Click Add.

5. Select *Implicit* as the routing type on the Transaction (Detail) page.
6. Select to override connector.
7. Verify that the gateway ID is *LOCAL* and the connector is *HTTPTARGET*.

8. Select the Messages tab.
9. Select *ESRI_MAP_EXT_REPLY_MSG* as the response message name.
Select *VERSION_1*.
10. Click the Return to Transaction List link.

To add the outbound synchronous transaction for map integration:.

1. Click the Add Transaction button on the Transactions page.
2. Select *Outbound Synchronous* as the transaction type on the Node Transactions page.
3. Select *RBG_MAP_REQ_MSG* as the request message.
4. Select *VERSION_1* as the request message version.
Click Add.
5. Select *Implicit* as the routing type on the Transaction (Detail) page.
6. Select the Messages tab.
7. Select *RBG_MAP_REPLY_MSG* as the response message name.
Select *VERSION_1*.
8. Click the Return to Transaction List link.

To add the outbound synchronous transaction to contain the transformed outbound and inbound reply message for map integration:.

1. Click the Add Transaction button on the Transactions page.
2. Select *Outbound Synchronous* as the transaction type on the Node Transactions page.
3. Select *ESRI_MAP_REQ_MSG* as the request message.
4. Select *VERSION_1* as the request message version.
Click Add.
5. On the Transaction (Detail) page, select *Implicit* as the routing type.
6. Select to override connector.
7. Verify that the gateway ID is *LOCAL* and the connector is *HTTPTARGET*.
8. Select the Messages tab.
9. Select *ESRI_MAP_REPLY_MSG* as the response message name.
Select *VERSION_1*.
10. Click the Return to Transaction List link.

See Also

PeopleSoft Integration Broker PeopleBook

Creating Transaction Connectors

Access the Connectors page.

Node Name ESRI

Transaction Connectors

Message Name ESRI_MAP_REQ_MSG **Effective Date** 03/17/2004

Gateway ID LOCAL ***Status** Active

Connector ID HTTPTARGET **Transaction Type** OutSync

Properties [Customize](#) | [Find](#) | First 1-3 of 3 Last

	*Property ID	*Property Name	Value		
1	HEADER	sendUncompressed	Y		
2	HTTPPROPE	Method	POST		
3	PRIMARYURL	URL			

► Password Encryption Utility

[Return to Transaction List](#)

Save

Connectors page

To define the transaction connector for map extent integration:

1. Click the Edit link beside the ESRI_MAP_EXT_REQ_MSG request message on the Transactions page.
2. Select the Connectors tab.
3. Enter this URL as the value for the PRIMARYURL property:

`http://<EsriServer>/servlet/com.esri.esrimap.Esrimap?ServiceName=<Service Name>`

Substitute the map service defined on ESRI for the <Service Name> parameter in this URL and the name of the server for <EsriServer>.

To define the transaction connector for map integration:

1. Click the Edit link beside the ESRI_MAP_REQ_MSG request message on the Transactions page.
2. Select the Connectors tab.
3. Enter this URL as the value for the PRIMARYURL property:

`http://<EsriServer>/servlet/com.esri.esrimap.Esrimap?ServiceName=<Service Name>`

Substitute the map service defined on ESRI for the <Service Name> parameter in this URL and the name of the server for <EsriServer>.

To define the transaction connector for geocode integration:

1. Click the Edit link beside the ESRI_ADDRESS_US_MSG request message on the Transactions page.
2. Select the Connectors tab.
3. Enter this URL as the value for the PRIMARYURL property: `http://<EsriServer>/servlet/com.esri.esrimap.Esrimap?ServiceName=<Service Name>&CustomService=Geocode`

Substitute the map service defined on ESRI for the <Service Name> parameter in this URL and the name of the server for <EsriServer>.

See Also

PeopleSoft Integration Broker PeopleBook

Setting Up Relationships and Transaction Modifiers

To implement ESRI, you must also create a relationship called PSFT2ESRI that defines the source and destination node used for transformation. You must also create transaction modifiers to define the initial request message, the result request message, and the transformation request and response, which is an application engine program.

Pages Used to Set Up Relationships and Transaction Modifiers

Page Name	Object Name	Navigation	Usage
Relationships	IB_RELATIONSHIP	PeopleTools, Integration Broker, Relationships, Relationships	Use this page to create the PSFT2ESRI relationship.
Transaction Modifiers	IB_RELTRXLIST	PeopleTools, Integration Broker, Relationships, Transaction Modifiers	Add transaction modifiers.
Relationships - Transaction Modifiers	IB_RELATIONTRX	Click the Add Transaction Modifier button on the Transaction Modifiers page.	Create relationship between transaction modifiers.

Creating the Relationship

Access the Relationships page.

Relationships Transaction Modifiers

Relationship ID PSFT2ESRI

Details

***Description** Psft 2 Esri

***Relationship Status** Active

Node

***Node Name** PSFT_CR [Properties](#) [Contact](#)

Node

***Node Name** PSFT_CR [Properties](#) [Contact](#)

Comment

[Save](#) [Return to Search](#)

Relationships page

To create the PSFT2ESRI relationship:

1. Create a relationship definition with the relationship ID of PSFT2ESRI.
2. Enter a description.
3. Change the relationship status to *Active*.
4. Enter the default node in both the Node Name definition fields.

Creating Transaction Modifiers

Access the Transaction Modifiers page.

Relationships

Transaction Modifiers

Relationship ID PSFT2ESRI
Node Name PSFT_CR
Node Name PSFT_CR

Transaction Modifiers

Customize | Find |

First 1-3 of 3 Last

Initial

Result

		Initial Node	Transaction Type	Request Message Name	Effective Date	Status	
1	Edit	PSFT_CR	OS	RBG_MAP_REQ_MSG	05/07/2002	Active	
2	Edit	PSFT_CR	OS	RBG_MAP_EXT_REQ_MSG	04/22/2002	Active	
3	Edit	PSFT_CR	OS	RBG_SYNC_ADDRESS_US_MSG	04/15/2002	Active	

Add Transaction Modifier

Save

Return to Search

Transaction Modifiers page

Relationships

Transaction Modifiers

Relationship ID PSFT2ESRI
Node Name PSFT_CR
Node Name PSFT_CR

Effective Date 03/17/2004
***Status** Active
Sequence number

Initial

Node PSFT_CR
Transaction Type OS
Request Message Name RBG_SYNC_ADDRESS_US_MSG
Version VERSION_1

Relationships - Transaction Modifiers page (1 of 2)

Result

Node PSFT_CR
*Transaction Type
Request Message Name ESRI_ADDRESS_US_MSG
Version VERSION_1

Transformations

Request

Response

Return to Transaction List

Save

Relationships - Transaction Modifiers page (1 of 2)

You will create transaction modifiers for the geocode, map extent, and map integrations.

To add the transaction modifier for geocode integration:

1. Click the Add Transaction Modifier button on the Transaction Modifiers page.
The Relationship Transactions - Add a New Value page appears.
2. Create the transaction modifier for geocode integration using the data in this table:

Field	Value
Relationship ID	<i>PSFT2ESRI</i>
Effective Date	Select an effective date.
Initial Node	<i>ESRI</i> or the default node
Request Message Name	<i>RBG_SYNC_ADDRESS_US_MSG</i>
Source Request Message Version	<i>VERSION_1</i>
Transaction Type	<i>OS</i>
Result Node	<i>ESRI</i> or the default node

Field	Value
Request Message Name	<i>ESRI_ADDRESS_US_MSG</i>
Target Request Message Version	<i>VERSION_1</i>

1. Enter the sequence number *10* on the Relationships - Transaction Modifiers page.
2. Select *OS* as the transaction type in the Result section of the page.
3. Select *RBG_ADDR_XSL* as the request in the Transformations region of the page.
4. Select *RBG_GEO_XSL* as the response in the Transformations region of the page.

To add the transaction modifier for map extent integration:

1. Click the Add Transaction Modifier button on the Transaction Modifiers page.
The Relationship Transactions - Add a New Value page appears.
2. Create the transaction modifier for geocode integration using the data in this chart:

Field	Value
Relationship ID	<i>PSFT2ESRI</i>
Effective Date	Select an effective date.
Initial Node	<i>ESRI</i>
Request Message Name	<i>RBG_MAP_EXT_REQ_MSG</i>
Source Request Message Version	<i>VERSION_1</i>
Transaction Type	<i>OS</i>
Result Node	<i>ESRI</i>
Request Message Name	<i>ESRI_MAP_EXT_REQ_MSG</i>
Target Request Message Version	<i>VERSION_1</i>

1. On the Relationships - Transaction Modifiers page, enter the sequence number *20*.
2. Select *OS* as the transaction type in the Result region of the page.
3. Select *RBG_OEXT_XSL* as the request in the Transformations region of the page.
4. Select *RBG_IEXT_XSL* as the response in the Transformations region of the page.

To add the transaction modifier for map integration:

1. Click the Add Transaction Modifier button on the Transaction Modifiers page.
The Relationship Transactions - Add a New Value page appears.
2. Create the transaction modifier for map integration using the data in this table:

Field	Value
Relationship ID	<i>PSFT2ESRI</i>
Effective Date	Select an effective date.
Initial Node	<i>ESRI</i>
Request Message Name	<i>RBG_MAP_REQ_MSG</i>
Source Request Message Version	<i>VERSION_1</i>
Transaction Type	<i>OS</i>
Result Node	<i>ESRI</i>
Request Message Name	<i>ESRI_MAP_REQ_MSG</i>
Target Request Message Version	<i>VERSION_1</i>

1. Enter the sequence number *30* on the Relationships - Transaction Modifiers page.
2. Select *OS* as the transaction type in the Results region of the page.
3. Select *RBG_OMAP_XSL* as the request in the Transformations region of the page.
4. Select *RBG_IMAP_XSL* as the response in the Transformations region of the page.

Setting Up Integration Flags

Three integration flags must be selected for the ESRI integration to work effectively. To implement ESRI, select integration flags for the geocode, map extent, and map integrations.

This section discusses how to:

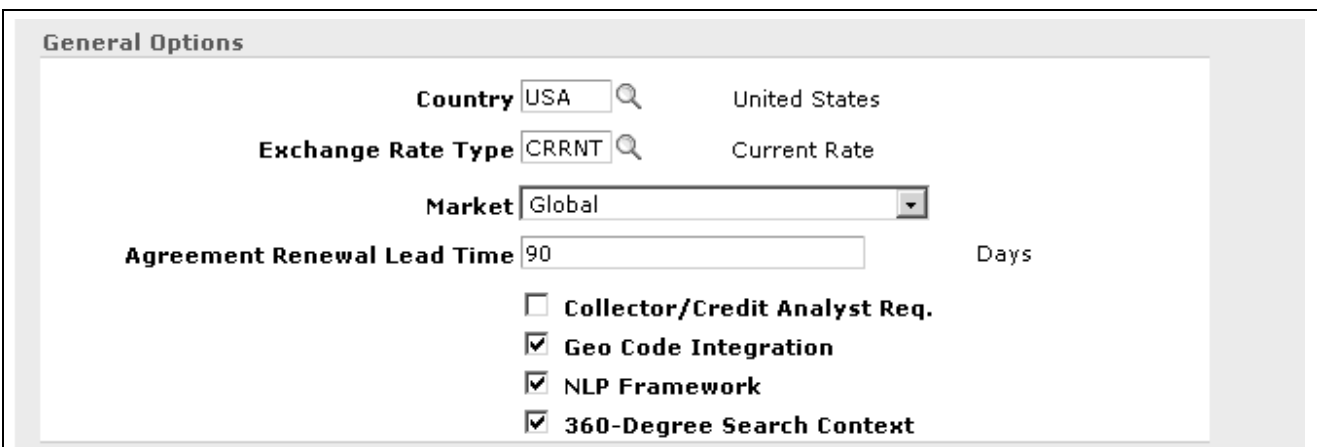
- Select the geocode integration flag.
- Select the map extent and map integration flags.

Pages Used to Set Up Integration Flags

Page Name	Object Name	Navigation	Usage
Installation Options	RB_INSTALLATION	Set Up CRM, Install, Installation Options, General Options	Select the flag for geocode integration.
Map Services	RBG_MAP_HDR_PG	Set Up CRM, Common Definitions, Integration Rules, Map Services, Map Services	Select the flags for map extent and map integration.

Selecting the Geocode Integration Flag

Access the Installation Options - General Options page.



General Options

Country United States

Exchange Rate Type Current Rate

Market

Agreement Renewal Lead Time Days

☐ Collector/Credit Analyst Req.

☒ Geo Code Integration

☒ NLP Framework

☒ 360-Degree Search Context

Installation Options - General Options page

Select the Geo Code Integration check box.

Selecting the Map Extent and Map Integration Flags

Access the Map Services page.

Map Services | Query Definition

Vendor Information

Market Government

GIS Vendor Name ESRI

Description Peoplesoft CRM 8.4 and ESRI - ArcIMS 3.1 Integration

☒ **Enable Map Extent Integration**

☒ **Enable Map Integration**

Services Find | View All First 1 of 1 Last

Map Service	Description	*Request Message	Active Map Service	Default Map Service
			<input type="checkbox"/>	<input type="checkbox"/>

Get Map Service Extents

Map Minimum X Map Minimum Y

Map Maximum X Map Maximum Y

Modified

* Required Field

Save Return to Search Add Update/Display

Map Services page

Select the Enable Map Extent Integration and Enable Map Integration check boxes.

Setting Up ESRI Integration

To set up ESRI Integration, use the Map Setup (RBG_MAP_SETUP) component.

To set up ESRI integration, define the ESRI map services to which you subscribe. You can define one or more map services to be used in PeopleSoft Customer Relationship Management (PeopleSoft CRM). The map services that you define appear as options on the case and service order components. On the Query Definition page, you define the PeopleSoft components that support map-related queries.

This section discusses how to:

- Set up map services.
- Set up query definition.

Pages Used to Set Up ESRI Integration

Page Name	Object Name	Navigation	Usage
Map Services	RBG_MAP_HDR_PG	Set Up CRM, Common Definitions, Integration Rules, Map Services, Map Services	Define the GIS vendor and the map services that you are using.
Query Definition	RBG_MAP_QRY_PG	Set Up CRM, Common Definitions, Integration Rules, Map Services, Query Definition	Define the components used for map-related queries. As delivered, map-related queries are enabled for case and service order.

Setting Up Map Services

Access the Map Services page.

Note. The previous section includes an example of the Map Services page.

Market	Displays market defaults from the search page.
GIS Vendor Name (geographical information system vendor name)	Enter the name of the GIS vendor.
Description	Enter a description of the service defined on this page.
Enable Map Extent Integration	Select to enable map extent integration. Map extent information determines the boundaries for zooms and pans. You must select to enable the Get Map Service Extents button in the Services group box.
Enable Map Integration	Select to enable the publishing of maps to the PeopleSoft system.
Services	
Map Service	Enter each map service that is to be used. The user can select the appropriate map service from the Map Dashboard search. Map services are set up on the ESRI site.
Description	Enter a description of the map service.
Request Message	Enter the message to be sent to ESRI to request the service.
Active Map Service	Select to make the map service active.
Default Map Service	Select to use the map service as the default.
Get Map Service Extents	Click to get the extents for the map service that you are defining. This sends a request to ESRI for the map service extent data and populates the map extent information on the page. The Get Map Service Extents button only works if you have selected Enable Map Extent Integration.

Map Minimum X
(minimum X coordinate),
Map Maximum X
(maximum X coordinate),
Map Minimum Y
(minimum Y coordinate),
and **Map Maximum Y**
(maximum Y coordinate)

After you request the map service extents, the system populates the minimums and maximums for the X and Y coordinates. This data establishes the boundaries for zooms and pans. Latitude and longitude appears in degrees.

Setting Up Query Definition

Access the Query Definition page.

Map Services

Query Definition

GIS Vendor Name

ESRI

Market

Government

Query Information

Find | View All

First 1 of 1 Last

Component Information

*Query Name

CASE

☐ Active Query

*Component Interface Name

RC_CASE_SS_WF_CI

☐ Default Query

*Component Name

RC_CASE_SW_SS

*Base Record

RBG_CASE_GEO_VW

Copy Fields

Customize | Find | View All

First 1 of 1 Last

From Record	From Field	To Record	To Field	Active
DERIVED_RC_SS	BO_ID_CONTACT	RBG_CASE_GEO_VW	BO_NAME	<input type="checkbox"/>

Modified

05/23/2002 3:11PM PDT

GOVADMIN

* Required Field

Query Definition page

- Query Name**

Enter a name for the query. The query name is selected on the Map Dashboard search page.
- Component Interface Name**

Enter the component interface that provides access to the component.
- Component Name**

Enter the name of the component on which you want to perform the query. PeopleSoft delivers PeopleSoft CRM set up to query on cases and service orders.
- Base Record**

Enter the name of the base record for the component.
- Active Query**

Select to enable the query definition.
- Default Query**

Select to use this query as the default.

Copy Fields

In the Copy Fields group box, define the fields that are to appear in the case or service order-related information grid that appears under the map on the Map Dashboard. For example, in a service order-related query, you may want to display the business unit, service order ID, consumer name, city, postal code, state, service order status, and service order priority. Each of these rows corresponds to a point shown on the map.

- From Record

Select the record name from which to retrieve the data.
- From Field

Select the field name from which to retrieve the data.
- To Record

Select the record name in the destination table.
- To Field

Select the field name in the destination table.
- Active

Select to enable the copying of the specified fields.

Accessing the Map Dashboard

Using the Map Dashboard search page, you can create customized searches to display the data. You can access the Map Dashboard search page from the agent view, navigation bar, Case page, or Service Order page.

Pages Used to Access the Map Dashboard

Page Name	Object Name	Navigation	Usage
Map Dashboard - Query	RBG_VIEW_MAP_PG	From the left navigation, click the Map Dashboard link on the menu.	Define the criteria for the search. You can search on one or more fields to define the results.
Map Dashboard - Map	RBG_VIEW_MAP_PG	<ul style="list-style-type: none">On the Case page, click the Map Dashboard button on the toolbar.On the Service Order page, click the Map Dashboard link.	Click the button on the Case page or the link on the Service Order page to go directly to the Map Dashboard. The system carries forward all of the values that you defined in the Query Definition setup.

Accessing the Map Dashboard

Access the Map Dashboard - Query page.

Map Dashboard

Query

Search

CASE

Map Service

SF Business

Use Search Criteria to Narrow the Search Results

Map Dashboard - Query page (1 of 2)

Search

Use Saved Search ▼

[Map It](#) [Clear](#) [Save Search Criteria](#) [Delete Saved Search](#) [Personalize Search](#)

Business Unit = ▼

Case ID = ▼

Customer Name = ▼

Contact Name = ▼

Date Created = ▼ 31

Problem Summary begins with ▼

Case Status = ▼

Case Type = ▼

Case Priority = ▼

Category = ▼

Specialty Type = ▼

Detail = ▼

City begins with ▼

State begins with ▼

Postal Code begins with ▼

Country = ▼

[Map It](#) [Clear](#) [Save Search Criteria](#) [Delete Saved Search](#) [Personalize Search](#)

Map Dashboard - Query page (2 of 2)

Search

Select *Case* or *Service Order*.

Map Service

The map service appears by default to the map that you defined on the Map Definition page. You can select from a list of available map services. The map services are configured on the ESRI site.

Use Saved Search

Select a saved search from the list.

Map It

Click the Map It button to submit the search and generate the map.

Save Search Criteria

Click the link to save the search criteria.

Personalize Search

Click the link to display a list of search fields. You can choose the fields to display on the search page.

Viewing the Map Dashboard

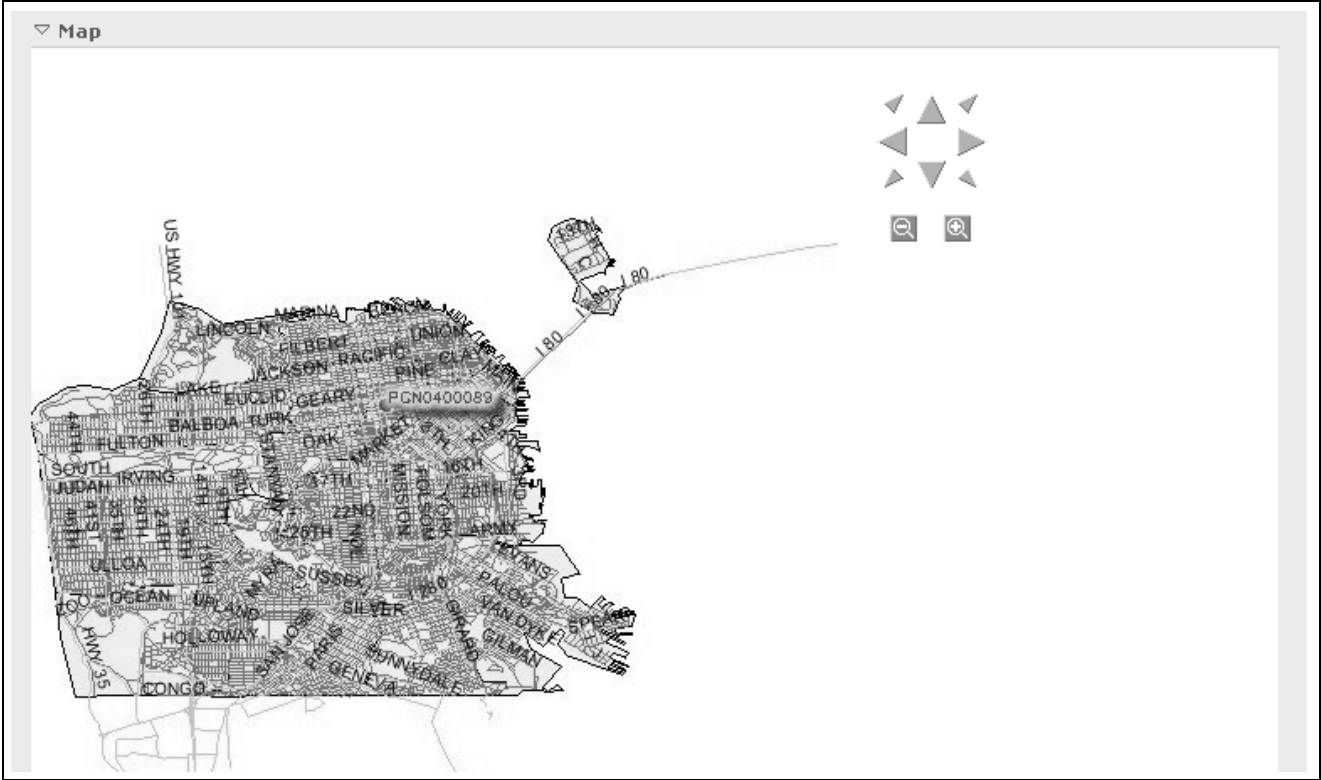
The Map Dashboard presents a graphical and tabular representation of the search results.

Page Used to View the Map Dashboard

Page Name	Object Name	Navigation	Usage
Map Dashboard - Map	RBG_VIEW_MAP_PG	Click Map It on the Map Dashboard - Query page.	Use this page to view the map and tabular data generated by the search.

Viewing the Map Dashboard

Access the Map Dashboard - Map page.



Map Dashboard - Map page

Use the directional arrows and zoom in and zoom out buttons to navigate to the areas on the map that you want to view.

Viewing Case-Related Information on the Map Dashboard

Access the Map Dashboard - Cases page.

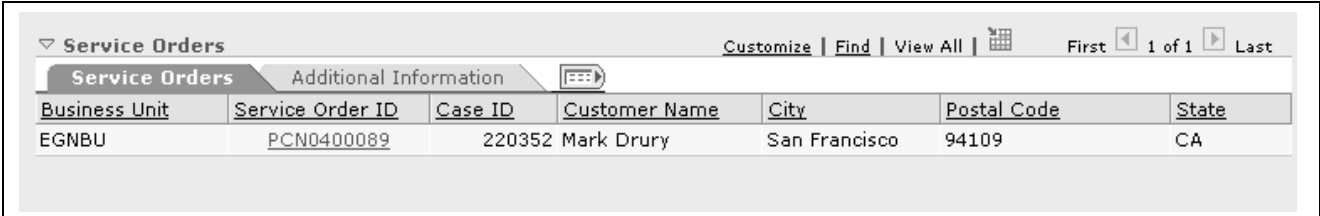
Cases						
Cases			Additional Information			
Business Unit	Case ID	Customer Name	Problem Summary	City	State	Postal Code
EGNBU	220436	Government Self-Service	Animal	San Francisco	CA	94104

Map Dashboard - Cases page

The Cases grid displays details of the case-related information that appear on the map. Click the Case ID link to navigate to the case details.

Viewing Service Order-Related Information on the Map Dashboard

Access the Map Dashboard - Service Orders page.



Service Orders						
Service Orders		Additional Information				
Business Unit	Service Order ID	Case ID	Customer Name	City	Postal Code	State
EGNBU	PCN0400089	220352	Mark Drury	San Francisco	94109	CA

Map Dashboard - Service Orders page

The Service Orders grid displays details of the service order-related information that appear on the map. Click the Service Order ID link to navigate to the service order details.

Viewing Geocode Errors

If the ESRI system cannot return a valid geocode for the address that is published, an error log is created.

Page Used to View Geocode Errors

Page Name	Object Name	Navigation	Usage
Geocode Error Log	CM_GEO_ERR_LOG_PG	Customers CRM, Geocode Error Log, Geocode Error Log	View addresses that do not generate valid geocodes.

Viewing Geocode Errors

Access the Geocode Error Log page.

Geocode Error Log

Error Log

CM ID	180685798381019433839291052566	Status	
Address Type	Address	City	San Francisco
Address Line 1	1600 California Street	State	CA
Address Line 2		Country	USA
Date Created	03/18/04 1:49PM	Created By	GOVGUEST
Description			

Modified	03/18/2004 1:49PM PST	GOVGUEST
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[Return to Search](#) [Next in List](#) [Previous in List](#)

Geocode Error Log page

This page displays addresses that do not generate valid geocodes

APPENDIX A

PeopleSoft CRM Solution Management Reports

This appendix provides an overview of PeopleSoft CRM Solution Management reports and enables you to view a summary table of all reports.

Note. For samples of these reports, see the Portable Document Format (PDF) files that are published on CD-ROM with the documentation.

See Also

PeopleSoft Process Scheduler

Using PeopleSoft Applications

PeopleSoft CRM Solution Management Reports: A to Z

This table lists the two solution management reports that are shared by PeopleSoft Support, PeopleSoft HelpDesk, and PeopleSoft Integrated FieldService.

Solution Usage Report

Report ID and Report Name	Description	Navigation	Run Control Page
RCC2012 Solution Usage	This report lists solutions that were used in cases created during the specified date range. For each solution, the report shows the solution usage count, solved count, and success rate.	Solutions, Reports, Solutions, Solution Usage	RUN_RCC2012

Top Ten Solutions by Product

Report ID and Report Name	Description	Navigation	Run Control Page
RCC2014 Top Ten Solutions by Product	<p>For each included product, this report lists the ten solutions that most often resolved cases that were created during the specified date range.</p> <p>For each solution, the report shows the number of cases solved for that product.</p>	Solutions, Reports, Top Solutions, Top Ten Solutions by Product	RUN_RCC2014

APPENDIX B

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	Azerbaijani 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 Franc
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	Maldiva 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	<p>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.</p> <p>In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.</p> <p>In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.</p> <p>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.</p>

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 <i>receivables specialist</i> . 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 <i>sub-classification</i> .
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> 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	<p>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.</p> <p>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.</p>
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	<p>Data elements, at their simplest level, define a subset of data and the rules by which to group them.</p> <p>For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.</p>
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	<p>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.</p> <p>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.</p>
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 <i>Enterprise Incentive Management ledger</i> . 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	<p>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.</p> <p>In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.</p>
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 <i>key performance indicator</i> . 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 <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . 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 <i>rates</i>) 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 <i>1</i> —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 <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> 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	Metastings are special expressions included in SQL string literals. The metastings, 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 <i>compensation object</i> .
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 <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT

	<p>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.</p>
record output VAT flag	<p>Abbreviation for <i>record output value-added tax flag</i>.</p> <p>See <i>record input VAT flag</i>.</p>
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 <i>real-time event notification server</i> 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 <i>basis</i> 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 <i>value-added tax exception</i> . 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 <i>value-added tax exempt</i> . 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 <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . 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 <i>zero-rated value-added tax</i> . 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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