PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook

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PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook
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Contents

Part 2
Business Object Management Basics

Chapter 6

Chapter 7

About This PeopleBook

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

This preface discusses:

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

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

PeopleSoft Application Prerequisites

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

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

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

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

PeopleSoft Application Fundamentals

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

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

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

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

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

See Also

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

Ordering Printed Documentation

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

- Web
- Telephone
- Email

Web

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

Telephone

Contact MMA Partners at 877 588 2525.

Email

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

See Also

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

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

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

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

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

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

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

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

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

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

Comments and Suggestions

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

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

Or send email comments to doc@peoplesoft.com.

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

Common Elements in These PeopleBooks

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

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

Description Enter up to 30 characters of text.

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

Once, Always, and **Don't Run**	Select Once to run the request the next time the batch process runs. After the batch process runs, the process frequency is automatically set to Don't Run. Select Always to run the request every time the batch process runs. Select Don't Run to ignore the request when the batch process runs.
Report Manager	Click to access the Report List page, where you can view report content, check the status of a report, and see content detail messages (which show you a description of the report and the distribution list).
Process Monitor	Click to access the Process List page, where you can view the status of submitted process requests.
Run	Click to access the Process Scheduler request page, where you can specify the location where a process or job runs and the process output format.
Request ID	An ID that represents a set of selection criteria for a report or process.
User ID	An ID that represents the person who generates a transaction.
SetID	An ID that represents a set of control table information, or TableSets. TableSets enable you to share control table information and processing options among business units. The goal is to minimize redundant data and system maintenance tasks. When you assign a setID to a record group in a business unit, you indicate that all of the tables in the record group are shared between that business unit and any other business unit that also assigns that setID to that record group. For example, you can define a group of common job codes that are shared between several business units. Each business unit that shares the job codes is assigned the same setID for that record group.
Short Description	Enter up to 15 characters of text.

PeopleSoft Enterprise Customer Relationship Management Business Object Management Preface

This preface discusses:

- Additional resources.
- PeopleSoft Enterprise Customer Relationship Management (CRM) application fundamentals.
- PeopleSoft Enterprise CRM product and item management.
- PeopleSoft Enterprise CRM automation and configuration tools.
- PeopleSoft Enterprise CRM services foundation.
- Enterprise PeopleTools PeopleBooks.

Note. This PeopleBook documents 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.

Additional Resources

The following resources are located on the PeopleSoft Customer Connection website.

Resource	Navigation
Application maintenance information	Patches + Fixes
Business process diagrams	Support, Documentation, Business Process Maps
Data models	Support, Documentation, Data Models
Enterprise Integration Point (EIP) catalog	Support, Documentation, Enterprise Integration Point (EIP) Catalog
Hardware and software requirements	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Hardware and Software Requirements
Installation guides	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Installation Guides and Notes

Resource	Navigation
PeopleBook documentation updates	Support, Documentation, Documentation Updates
PeopleSoft support policy	Support, Support Policy
Product release roadmap	Support, Roadmaps + Schedules
Release notes	Implement, Optimize + Upgrade, Upgrade Guide, Upgrade Documentation and Software, Release Notes
Table loading sequences	Implement, Optimize + Upgrade, Implementation Guide, Implementation Documentation and Software, Table Loading Sequences
Troubleshooting information	Support, Troubleshooting
Upgrade Documentation	Implement, Optimize + Upgrade, Upgrade Guide

PeopleSoft Enterprise CRM Application Fundamentals

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

- Workforce Management.

  This part discusses how to administer workers who perform tasks such as support or field service in PeopleSoft Enterprise CRM. It includes information on competency management and assigning workers to tasks.

- 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.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook

PeopleSoft Enterprise CRM Product and Item Management

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

See Also

PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook

PeopleSoft Enterprise CRM Enterprise 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 PeopleSoft Enterprise CRM applications. This is an essential companion to the PeopleSoft Enterprise CRM Application Fundamentals 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 Enterprise CRM workflow, the Active Analytics Framework (OAF), business projects, and scripts.

- Configuration Tools.

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

- Knowledge Management.

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

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook

PeopleSoft Enterprise CRM Services Foundation

The *PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook* discusses configuration options that are common to PeopleSoft Integrated FieldService and the PeopleSoft call center applications (PeopleSoft Support, PeopleSoft HelpDesk, and PeopleSoft HelpDesk for Human Resources).

There are four parts to the *PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook:*

- Entitlement Management.

  Entitlement management enables users to manage agreements and warranties.
- Solution Management.

  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.

  Time management enables users to log time for the work performed on service order lines and cases.
- Environmental Systems Research Institute (ESRI) integration.

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

See Also

PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook

Enterprise PeopleTools PeopleBooks

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

PART 1

Getting Started

CHAPTER 1

Getting Started with Enterprise CRM Business Object Management

This chapter provides an overview of business object management in PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM) and discusses:

- PeopleSoft Enterprise CRM cross-product business processes.
- PeopleSoft Enterprise CRM cross-product integrations.
- PeopleSoft Enterprise CRM cross-product implementation.

PeopleSoft Enterprise CRM Business Object Management Overview

PeopleSoft Enterprise CRM represents customers (companies, sites, consumers), contacts of customers, and workers as business objects in the customer data model. Business objects can have different roles attached to them. Depending on the role that a business object plays, it can require different types of data and can participate in different relationships with other business object-role combinations.

PeopleSoft Enterprise CRM provides:

- Setup tables that define possible business object roles and relationships.
- Components that enable you to manage data, roles, and relationships for customers in the BORM.
- Business object searches that enable you to locate an existing business object to use in transactions.
- The capability to quickly create a business object immediately by entering essential information.

PeopleSoft Enterprise CRM Business Object Integrations

PeopleSoft Enterprise CRM applications integrate with each other and with other external systems. Application-specific integrations are discussed in the application-specific PeopleBooks. The following integrations apply to business objects in the BORM:

- Integration with PeopleSoft Human Resources Management or other similar systems enables you to synchronize CRM employee records with the system of record for human resources data.
- Integration with PeopleSoft Supply Chain Management (PeopleSoft SCM) or other similar systems enables you to synchronize customer data that is required for applications within PeopleSoft Enterprise CRM such as Sales, Field Service, and Order Capture.

- Integration with PeopleSoft SCM and Financial Management Solutions enables billing information and payment information that is associated with customers to appear in the PeopleSoft Enterprise CRM 360-Degree View.
- The Credit Card EIP (enterprise integration point) enables you to integrate with third-party credit card authorization and payment vendors in PeopleSoft Support and the PeopleSoft collaborative selling applications.

Refer to the implementation chapters in this PeopleBook for detailed information. You can find supplemental information about third-party application integrations on the PeopleSoft Customer Connection website.

PeopleSoft Enterprise CRM Business Object Implementation

PeopleSoft Setup Manager enables you to generate a list of setup tasks based on the features that you are implementing. Setup tasks include:

- A list of components that you must set up.

  This list is the order in which you must set up the components and enter data into them.
- Links to the corresponding PeopleBook documentation.

PeopleSoft Enterprise CRM also provides component interfaces (CIs) to help you load data from an existing system into PeopleSoft Enterprise CRM tables. Use the Excel to Component Interface utility with the component interfaces to populate the tables.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Getting Started with PeopleSoft Enterprise Customer Relationship Management 8.9 Applications”.

Other Sources of Information

In the planning phase of implementation, take advantage of all PeopleSoft sources of information, including the installation guides, data models, business process maps, and troubleshooting guidelines. A complete list of these resources appears in the preface of the *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, with information about where to find the most current version of each.

See Also

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Component Interfaces

PeopleSoft Enterprise Setup Manager for Customer Relationship Management 8.9 PeopleBook

PART 2

Business Object Management Basics

CHAPTER 2

Understanding Business Object Relationship Model Components

This chapter discusses:

- BORM (business object relationship modeling) architecture.
- Address books for business objects.
- Business object searches.
- Basic data tables.
- Business object profiles.

Note. Select the Library tab on the PeopleSoft Customer Connection website to view a detailed data model diagram of the business object relationship model.

Business Object Relationship Modelling

This section discusses:

- BORM architecture.
- Business object components.
- Roles.
- Relationships.
- Customers and business contacts.

BORM Architecture

The business object relationship model (BORM) provides a flexible architecture for establishing and maintaining the relationships that form the foundation of the business model. You can support business-to-business and business-to-consumer models within a single implementation of the BORM.

A business object is any entity for which you store data and that participates in one or more business relationships. The primary key on the business object record, the BO_ID, acts as a pointer to the entity records. This design enables you to create and maintain relationships between different entities without regard to their various key structures.

Business objects participate in relationships with other business objects according to their assigned roles. Business object types categorize business objects and enable you to define roles for each type. The business object record also provides a common field (BO_NAME) for naming different entities that participate in relationships. For a relationship to be meaningful to users, you should associate a name with each relationship participant.

You can add organization-specific entities to the system and manage relationships for these new entities in the core PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM) applications with little or no application customization.

Business Object Components

PeopleSoft Enterprise CRM delivers a set of transactions, or components, for creating business objects:

- Company
- Partner
- Site
- Person
- Worker

Every business object that you create in a system component has a type of either Organization or Individual. The Organization business objects are either companies, partners, or sites; and the Individual business objects are persons. The Person business object can represent any or all of the following: a consumer, a contact, or a worker, depending on the role that is associated with it.

Note. You can create a worker directly within the Worker component or by adding the Worker role to a Person business object.

See Also

Chapter 8, "Defining Company Business Objects ," page 107

Chapter 10, "Defining Person Business Objects," page 127

Chapter 9, "Defining Site Business Objects ," page 117

Chapter 15, "Defining Ad Hoc Business Objects," page 265

Chapter 11, "Defining Workers," page 143

Roles

You must associate a business object with a role before it can participate in a relationship. In the business object relationship model, the roles that a business object can play are tracked in the Business Object Role table (BO_ROLE). Delivered roles are associated with company, partner, consumer, site, contact, and worker business objects. You can define additional roles.

In most cases, the way that you create the business object determines its role. For example, when you create a business object in the Company component, the Company role is automatically assigned to it.

You can add a role to a business object either explicitly by using the Add Role option in the Relationship Viewer or implicitly by selecting certain component options. For example, when you designate a company address as a ship to, sold to, or bill to address, the system implicitly assigns the ship to organization, sold to organization, or bill to organization role to the company.

See Also

Chapter 3, "Defining Control Values for Business Objects," Defining Role Types and Role Categories , page 22

Chapter 7, "Working with the Relationship Viewer," page 93

Relationships

Business object relationship records (BO_REL) capture a connection between two business objects, each playing a specific role. You create relationships to track and view information about customers. For example, relationships can show the corporate structure of a company and the contacts that you work with at each of the corporate sites.

To establish a relationship between two business objects, you first define relationship type records (BO_REL_TYPE), which define the rules of the relationship, including the role that a business object must have to participate in the relationship, and the number of business objects that can participate in a specific relationship role.

Company, partner, site, person, and worker business objects participate in the delivered relationship types. You can define additional relationship types to support business needs.

See Also

Chapter 3, "Defining Control Values for Business Objects," Defining Relationship Types and Relationship Categories, page 25

Chapter 7, "Working with the Relationship Viewer," page 93

Customers and Business Contacts

In the BORM, customers are the company, site, and consumer business objects. When you define any customer to the system, a record is created in the Business Contact (BC) table. This record enables you to define sold to, ship to, or bill to options for customer business objects. You can manage contact information based on the purchasing options—sell to, ship to, or bill to options—that are assigned to the business object.

See Chapter 5, "Defining Purchasing Options for Companies, Consumers, and Sites," page 63.

Key Performance Indicators

A key performance indicator represents a customer's overall performance on some criterion, usually revenue generated. Key performance indicators are useful to establish and keep successful relationships with customers—for example, to determine which customers are eligible for special values or promotions.

PeopleSoft Enterprise Performance Management (PeopleSoft EPM) uses customer information that you define as performance criteria to calculate and determine one single key performance indicator. You can represent a key performance indicator value as anything that is meaningful to business users— for example, a category such as gold, silver, or bronze or a calculated number value.

When the key performance indicator value is available in PeopleSoft EPM, PeopleSoft Enterprise CRM can access it by using enterprise integration. When available, this information is displayed in the Assessment field on the component details page.

See Also

Chapter 4, “Defining Name and Address Information for Business Objects,” Defining Customer Contacts , page 57

Chapter 9, “Defining Site Business Objects ,” page 117

Chapter 4, “Defining Name and Address Information for Business Objects,” page 45

Chapter 4, “Defining Name and Address Information for Business Objects,” Defining Customer Contacts , page 57

Chapter 16, “Managing Enterprise Integration for PeopleSoft Enterprise CRM ,” Mapping Message Data to PeopleSoft Enterprise CRM Records and Fields, page 294

Chapter 16, “Managing Enterprise Integration for PeopleSoft Enterprise CRM ,” Understanding Enterprise Integration Technology, page 269

PeopleSoft Enterprise Components for CRM 8.9 PeopleBook

PeopleSoft 8.8 Customer Scorecard PeopleBook

Address Books for Business Objects

Address books group together all the primary contact methods, or communication channels, for a business object. An address book entry refers to a grouping which can contain one postal address, two email addresses, and up to four phone, fax, or pager numbers. Each business object can have one or more address book entries associated with it. For example, a consumer might have an address book entry for both home and work.

When you implement the CRM system, you designate how many address book entries are available for each organization and individual business object type. At run time, users of the system can select which address book entries appear for the business object and can update the contact method information that is associated with each address book entry.

See Also

Chapter 4, “Defining Name and Address Information for Business Objects,” page 45

Chapter 9, “Defining Site Business Objects ,” page 117

Chapter 10, “Defining Person Business Objects,” page 127

Business Object Searches

Business object searches:

- Enable CRM users to locate specific business objects for display or update.
- Are called from system prompts and the Business Object Search component.
- Return a set of selected business objects that meet the search criteria.

Delivered system data includes a set of search definitions that support functionality in the PeopleSoft core applications; you can modify these search definitions or create additional definitions.

See Also

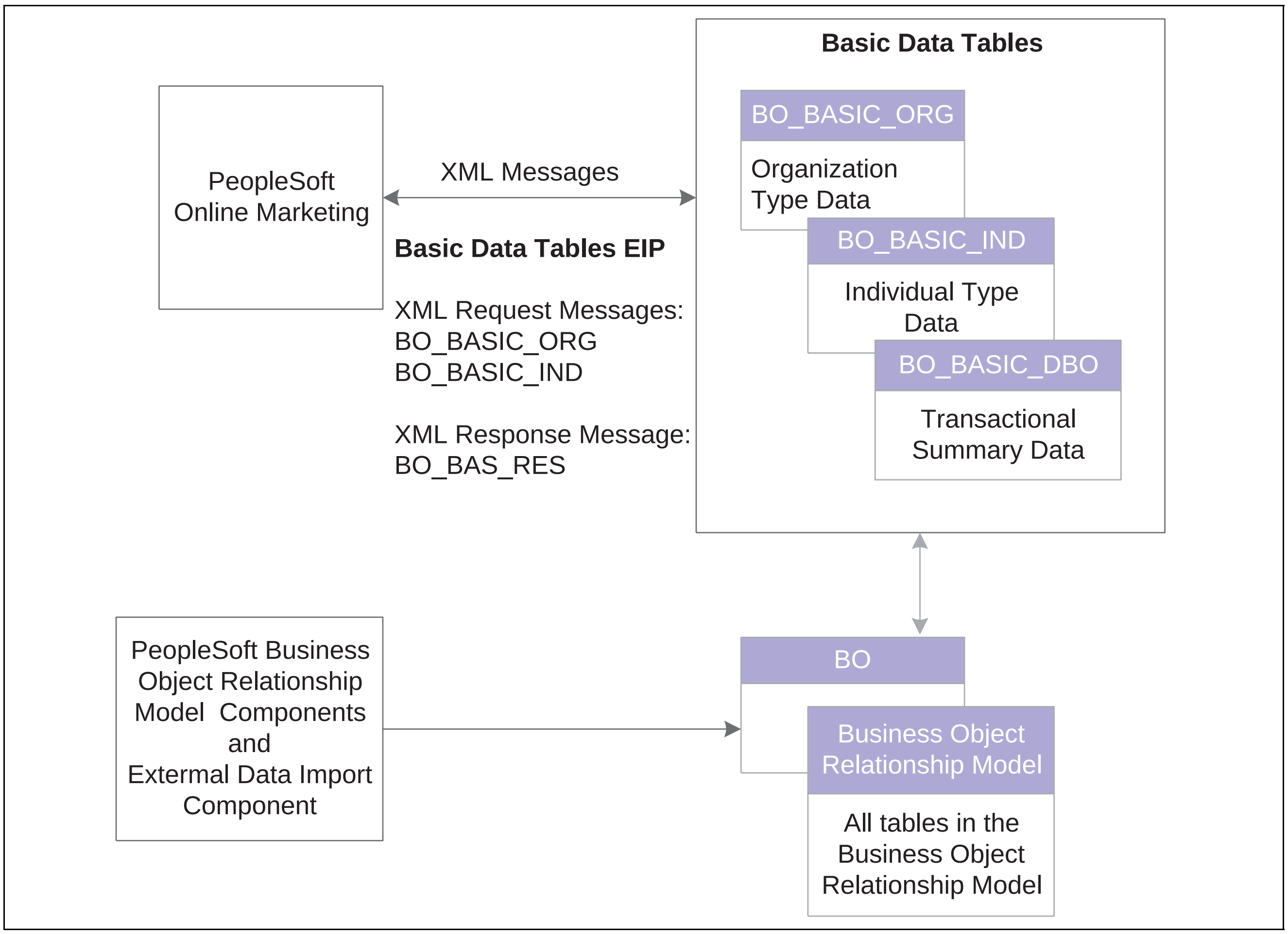
Chapter 12, "Working with Predefined Business Object Search and Quick Create Data," page 165

Basic Data Tables

The basic data tables contain a subset of information from the business object relationship model tables. PeopleSoft Enterprise CRM created these tables to assist with integration between the different CRM products. Currently, PeopleSoft Online Marketing and the external import functionality use these tables. The basic data tables give these other PeopleSoft products an efficient and quick way to obtain the information that they need for their business requirements.

During installation, the basic data tables are automatically synchronized with the information that is in the business object relationship model. After that, the system keeps the business object relationship model tables and the basic data tables in sync.

This diagram illustrates the relationship between CRM basic data tables and the business object relationship model:



Basic Data Tables

When you create a business object that uses the business object relationship model components, upon saving the information the business object relationship model tables are updated and a subset of this information is passed to the basic data tables.

PeopleSoft Online Marketing retrieves information directly from the basic data tables and updates information on the basic data tables by using XML messages. When the information is placed on the basic data tables, this information is also passed to the business object relationship model tables. The business object relationship model tables and the basic data tables are always in sync.

The external data import process also updates the basic data tables if audience information is attached to the import template.

See Also

Chapter 17, "Importing Data Into PeopleSoft Enterprise CRM," page 299

PeopleSoft Enterprise Online Marketing 8.9 PeopleBook

Chapter 8, "Defining Company Business Objects ," page 107

Chapter 10, "Defining Person Business Objects," page 127

Chapter 9, "Defining Site Business Objects ," page 117

Business Object Profiles

Profile fields provide a configurable way for marketers to define and collect customer information, such as color preference, brand preference, or shipping preference, through online marketing. Profile data is defined and stored separately from the BORM but is related to a business object by its BO_ID key.

PeopleSoft Enterprise CRM components enable you to view and update business object profiles for a business object. You can also use profile fields as business object search criteria.

See Also

Chapter 6, "Working with Business Object Profiles," page 73

CHAPTER 3

Defining Control Values for Business Objects

This chapter provides an overview of business object controls and discusses how to:

- Define business object and name types.
- Define role types and role categories.
- Define relationship types and relationship categories.
- Configure address books.
- Set up contact methods.
- Define component transfer navigation.
- Define segment codes.
- Define industries.
- Define national ID types.
- Define customer groups.
- Define customer data management system options.
- Define basic data mappings.

Understanding Business Object Controls

Business object control values are options that users can select when defining business objects. For many of these controls, the PeopleSoft system provides system data to support specific processing.

This section discusses:

- Business object types.
- Role types and role categories.
- Relationship types and relationship categories.
- Contact information entries.
- Contact method types and contact method purpose types.
- Component transfer navigation.

Business Object Types

The term *business object* refers to any entity that can participate in business relationships. Business objects participate in relationships with other business objects according to their assigned roles. Business object types categorize business objects and enable you to define roles for each type.

The PeopleSoft system delivers these predefined business object types:

- Individual

  Represents a single individual, such as a contact or a consumer.

- Organization

  Represents a group of individuals, such as a company.

- Database Object

  Represents an object in the system, such as a financial account.

See Chapter 3, “Defining Control Values for Business Objects,” Modifying and Adding Business Object Types, page 21.

Role Types and Role Categories

Business objects participate in relationships according to their assigned roles, or role types. Each business object type has a set of role types associated with it.

Individual Role Types

The PeopleSoft system delivers these role types for individual business objects:

- Person

  This role indicates a person with an undefined role. This role is automatically assigned when you create consumers, contacts, and workers by using the Person component.

- Worker

  This role indicates a person who performs work for your company, either as an employee or as a contractor. This role is automatically assigned when you define a worker by using the Worker component.

- Broker

  This role indicates a person who acts on behalf of multiple customers. You manually assign this role to a contact business object by using the Role page of the ad hoc Business Object component.

- Contact

  This role indicates a person who acts on behalf of a customer or a partner company. This role is automatically assigned when you designate that a person is a contact of a customer or a partner company.

- Individual Consumer

  This role indicates a person who purchases, leases, or contracts for your products or services. This role is automatically assigned when you define a consumer by using the Consumer component. The Consumer component no longer exists. The Consumer and Contact components are combined. Refer to the Person component instead.

- Account Contact

  This role indicates a person who participates as a member of an account team assigned to manage a corporate account. This role is automatically assigned when you define a worker as a member of an account team on the Accounts page of the Company, Site, or Consumer components.

- Internal Contact

  This role is used for converting earlier versions of PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM). PeopleSoft Enterprise CRM previously used contact types; these are now role types.

- External Contact

  This role is used for converting earlier versions of PeopleSoft Enterprise CRM. PeopleSoft Enterprise CRM previously used contact types; these are now role types.

- Business Contact (IND)

  This role indicates that the individual is a customer.

- Ship To Individual

  This role indicates that the individual is a customer who can receive shipments. This role is for order processing.

- Sold To Individual

  This role indicates that the individual is a customer who can make purchases. This role is for order processing.

- Bill To Individual

  This role indicates that the individual is a customer who can receive bills. This role is for order processing.

- Individual Prospect

  This role indicates an individual prospect. This role is for sales.

Organization Role Types

The PeopleSoft system delivers these role types for organization business objects:

- Company

  This role indicates an organization that purchases, leases, or contracts for your products or services. This role is automatically assigned when you define a customer by using the Company component.

- Site

  This role indicates a place where a product is shipped or installed, or where a service is performed. This role is automatically assigned when you define a site by using the Company, Consumer, or Site component.

- Competitor

  This role indicates a company that competes for your company's customer base. You can manually assign this role to company business objects by using the Role page of the ad hoc Business Object component.

- Partner

  This role indicates a company that cooperates with your company in a joint venture.

- Primary Owner - Company

  This role indicates a company that is the primary owner. This role is used in PeopleSoft Sales.

- Corporate Hierarchy

  This role represents a corporate hierarchy.

- Business Contact (ORG)

  This role indicates that the organization is a customer.

- Ship To Organization

  This role indicates that the customer can receive shipments.

- Sold To Organization

  This role indicates that the customer can make purchases.

- Bill To Organization

  This role indicates that the customer can receive bills.

- Organizational Prospect

  This role indicates that the individual is an organizational prospect.

Depending on what PeopleSoft Enterprise CRM solutions you have implemented, you might see additional role types listed on the system setup pages for roles. Additionally, you can view the organization of role types into role categories that support processing that applies to a specific set of role types.

See Also

Chapter 3, “Defining Control Values for Business Objects,” Defining Role Types and Role Categories , page 22

Relationship Types

Relationship types describe the relationship between two business objects. You must define a relationship type for each relationship in which a business object with a specific role can participate. These are the predefined business object relationship types:

- Company <—> Site

  This indicates a nonhierarchical relationship between the company and site role types, indicating that a company includes a site. The relationship is automatically established when you associate a site with a company by using the Company or Site component.

- Site <—> Site

  This indicates a peer-to-peer relationship between two site role types, indicating that the sites are associated with the same company. You create this relationship manually by using the Relationship page of the ad hoc Business Object component.

- Primary Contact <—> Company

  This indicates a relationship between the contact and company role types, indicating that the person with the contact role is the primary contact for the company. The relationship is automatically established when you indicate the primary contact for a company by using the Company component.

- Contact <—> Company

  This indicates a relationship between the contact and company role types, indicating that the person with the contact role is a contact for the company. The relationship is automatically established when you associate a contact with a company by using the Company or Site components or the Person component with the Contact role.

- Primary Contact <—> Site

  This indicates a relationship between the contact and site role types, indicating that person with the contact role is the primary contact for the site. The relationship is automatically established when you indicate the primary contact for a company by using the Site component.

- Contact <—> Site

  This indicates a relationship between the contact and site role types, indicating that person with the contact role is a contact for the site. The relationship is automatically established when you associate a contact with a site by using the Company or Site components or the Person component with the Contact role.

- Primary Contact <—> Consumer

This indicates a relationship between the contact and consumer role types, indicating that person with the contact role is the primary contact for the consumer. The relationship is automatically established when you indicate the primary contact for a consumer by using the Person component with the Consumer role.

- Contact <—> Consumer

  This indicates a relationship between the contact and consumer role types, indicating that the person with the contact role is a contact for the consumer. The relationship is automatically established when you associate a contact with a consumer by using the Site component or the Person component with the Consumer or Contact role.

- Primary Contact <—> Person

  This indicates a relationship between contact and person role types, indicating that the person with the contact role is the primary contact for the person with the person role. This relationship is manually created by using the Relationship page of the ad hoc Business Object component.

- Contact <—> Person

  This indicates a relationship between the contact and person role types, indicating that person with the contact role is a contact for the person with the person role. You manually create this relationship by using the Relationship page of the ad hoc Business Object component.

- Consumer <—> Site

  This indicates a nonhierarchical relationship between the consumer and site role types, indicating that a consumer is associated with a site. The relationship is automatically established when you associate a site with a consumer by using the Site component or the Person component with the Consumer role.

- Parent Company <—> Company

  This indicates a hierarchical relationship between two company role types, indicating that one company is the parent of another company. The relationship is automatically established when you define a parent company on the Company component.

- Primary Contact <—> Competitor

  This indicates a relationship between the contact and competitor role types, indicating that the person with the contact role is the primary contact for a competitor. This relationship is manually created by using the Relationship page of the ad hoc Business Object component.

- Contact <—> Competitor

  This indicates a relationship between the contact and competitor role types, indicating that the person with the contact role is a contact for a competitor. This relationship is manually created by using the Relationship page of the ad hoc Business Object component.

- Acct Owner <—> Company

  This indicates a relationship between account contact and company role types, indicating that the person with the account contact role is the owner of the company account. This relationship is automatically created when you indicate the owner on the Account page of the Company component.

- Acct Team Member <—> Company

  This indicates a relationship between the account contact and company role types, indicating that the person with the account contact role is a member of the company account team. This relationship is automatically created when you add an account member on the Account page of the Company component.

- Contact <—> Partner

  This indicates a relationship between the contact and partner role types, indicating that the person with the contact role is a contact for the partner. The relationship is automatically established when you associate a contact with a partner.

- Primary Contact <—> Partner

  This indicates a relationship between the contact and partner role types, indicating that the person with the contact role is a primary contact for the partner. The relationship is automatically established when you designate a contact as the primary contact for a partner.

Depending on what PeopleSoft Enterprise CRM solutions you have implemented, you might see additional relationship types listed on the system setup pages for roles. Additionally, you can view the organization of relationship types into relationship categories that support processing that applies to a specific set of relationship types.

See Also

Chapter 3, "Defining Control Values for Business Objects," Defining Relationship Types and Relationship Categories, page 25

Contact Information Entries

The address book for a customer, contact, or partner contains multiple contact information entries. Address book entries combine multiple contact methods for a business object into one entry for easy accessing and updating.

As delivered, the Individual business object type has three default contact information entries with the descriptions: Business, Home, and All Others. The Organization business object type has two default contact information entries with the descriptions: Business and Home. Users can change the entry description when they enter contact information.

You can create different types of address books to reflect the different purposes for which you might contact a business object.

See Also

Chapter 2, "Understanding Business Object Relationship Model Components," Address Books for Business Objects, page 10

Chapter 4, "Defining Name and Address Information for Business Objects," Maintaining Address Books, page 52

Contact Method Types and Contact Method Purpose Types

In PeopleSoft Enterprise CRM, you can define multiple, effective-dated communication channels for company, site, consumer, contact, and worker business objects. For contact business objects, you can also define multiple communication channels for each of the roles that the contact plays in relationships with company, consumer, and site business objects.

Contact Method Types

A contact method is a specific communication channel. When you define a contact method for a business object or business object in a specific relationship role, you define the contact method type and purpose. The contact method type indicates the kind of communication channel, such as telephone or email.

PeopleSoft Enterprise CRM provides these predefined contact method types:

- Address
- Phone
- Email

Contact Method Purpose Types

The contact method purpose indicates when the contact method is used. For example, a contact method purpose of *Main* may indicate the address to use for sending mail to a company's main offices. Similarly, a contact purpose type of *Home* may indicate the phone number to use when calling a consumer in the evening. You can define a set of contact method purpose types for each contact method in the system.

These predefined contact method purpose types are available for the address contact method type:

- Physical Location
- Business
- Campus
- Dormitory
- Home
- Legal
- Mailing
- Other

These contact method purpose types are available for the phone contact method type:

- Business
- Cellular
- Default
- FAX
- Home
- Telex
- Campus
- Dormitory
- Main
- Other

These contact method purpose types are available for the email contact method type:

- Business
- Campus
- Dorm
- Home
- Other

See Also

Chapter 3, "Defining Control Values for Business Objects," Setting Up Contact Methods, page 29

Component Transfer Navigation

A component navigation definition defines a specific transaction page in the system that users can transfer to from the Relationship Viewer component or the Relationship page of the Company, Consumer, Contact, and Site components. A transfer button appears next to each business object that appears in the relationship viewer, if the business object is editable. If the business object is read-only, a hyperlink to the business object appears, The location that you access with the button is determined by a component navigation definition.

These predefined component navigation definitions are available:

Note. The text in parentheses indicates the component navigation transaction ID.

Component Navigation Definition	Description
Account Representative (ACCTREP)	Enables transfers to the Accounts page of the Company component.
Business Contact (BC)	Not implemented for this release.
Business Object (BO)	Enables transfers to the Business Object page of the ad hoc Business Object component.
Company (COMPANY)	Enables transfers to the Company page of the Company component.
Individual Consumer (CONSUMER)	Enables transfers to the Consumer page of the Consumer component.
Partner (PARTNER)	Enables transfers to the Consumer page of the Consumer component.
Person (PERSON)	Enables transfers to the Contact page of the Contact component.
Site (SITE)	Enables transfers to the Site page of the Site component.
Worker (WORKER)	Enables transfers to the Worker page of the Worker component.

Defining Business Object and Name Types

To define business object and name types, use the Business Object Type (BO_TYPE) and Business Object Name Type (BO_NAME_TYPE) components.

This section discusses how to:

- Modify and add business object types.
- Define name types for business objects.

Pages Used to Define Business Object and Name Types

Page Name	Object Name	Navigation	Usage
Business Object Type	BO_TYPE	Set Up CRM, Common Definitions, Customer, Business Object Type, Business Object Type	Modify and add business object types.
Business Object Name Type	BO_NAME_TYPE	Set Up CRM, Common Definitions, Customer, Business Object Name Type, Business Object Name Type	Define name types for the selected business object type. When you define names for a business object, you must specify a type for each name.

Modifying and Adding Business Object Types

Access the Business Object Type page.

When you open a business object type record that is delivered as system data, the record information appears in a display-only format. To update the system data record, click the Modify System Data button.

Important! PeopleSoft does not support changes made to the system data that is delivered with PeopleSoft Enterprise CRM.

Business Object Type ID Displays the identification code that is associated with the business object type. When you add a new business object type, the system automatically assigns a value by using automatic numbering functionality.

Note. You should seldom need to add additional business object types. Most entities that participate in relationships are adequately categorized by the delivered types.

Defining Name Types for Business Objects

Access the Business Object Name Type page.

In PeopleSoft Enterprise CRM, each business object can have multiple names. The business object name type classifies each associated name for informational purposes. A name type is required for each business object name record.

Business Object Name Type Enter the name type. The delivered name types are *Preferred* and *Alternate*.

See Also

Chapter 4, “Defining Name and Address Information for Business Objects,” Updating Name Information , page 48

Defining Role Types and Role Categories

To define business object role types, use the Role Type (BO_ROLE_TYPE) component.

This section discusses how to:

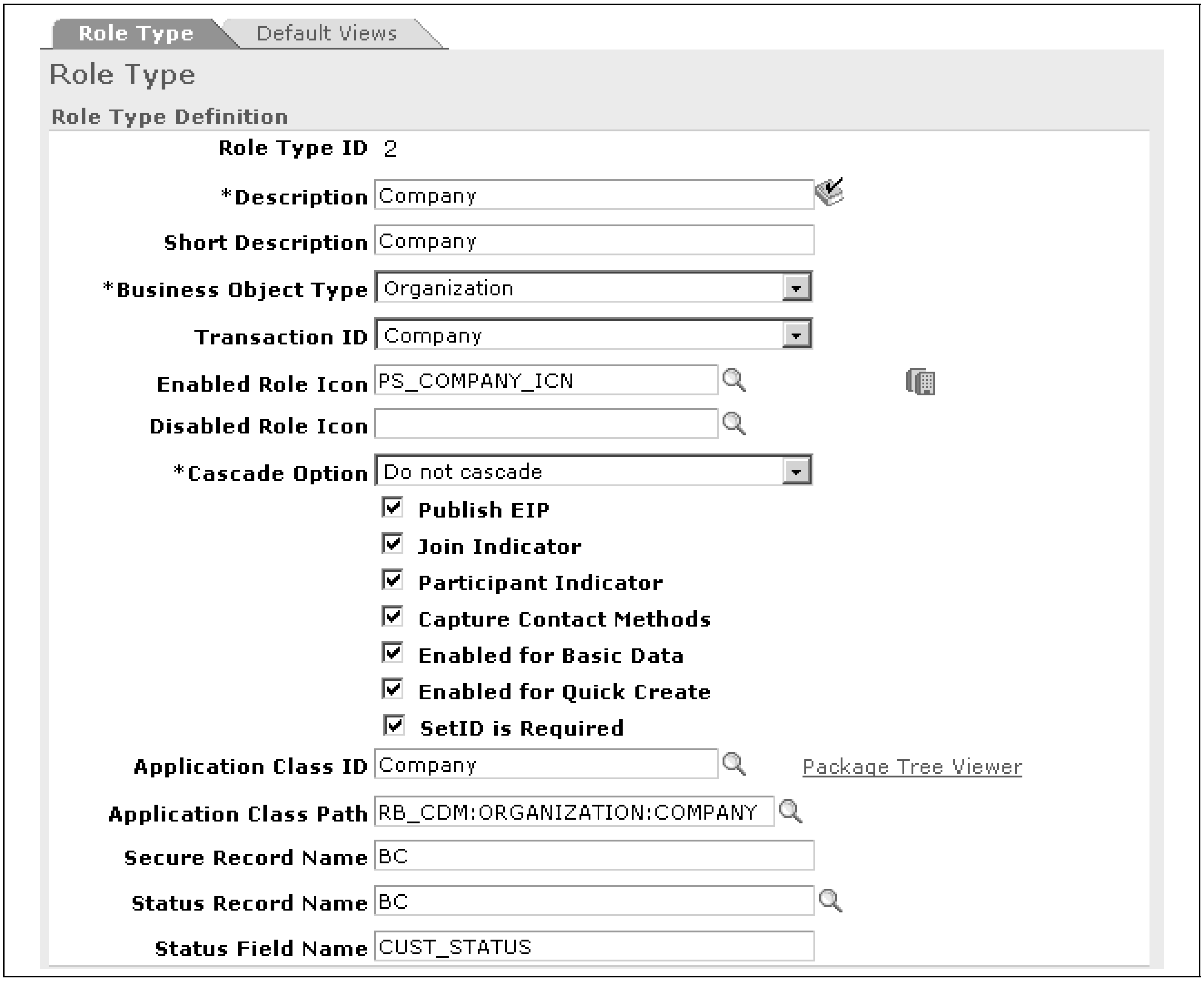
- Modify and add role types.
- Modify and adding role categories.

Pages Used to Define Role Types and Categories

Page Name	Object Name	Navigation	Usage
Role Type	BO_ROLE_TYPE	Set Up CRM, Common Definitions, Customer, Role Type, Role Type	Modify and add role types.
Role Category	BO_SRCH_GROUP	Set Up CRM, Common Definitions, Customer, Role Category, Role Category	Modify and add role categories. Generally, role categories serve a specific processing purpose, such as a business object directory search process.

Modifying and Adding Role Types

Access the Role Type page.



Role Type page

When you open a role type that is delivered as system data, the role type information appears in display-only format. To update the role type, click the Modify System Data button.

Important! PeopleSoft does not support changes made to the system data that is delivered with PeopleSoft Enterprise CRM.

Role Type ID	Displays the identification code that is associated with the business object role type. When adding a new role type, the system automatically assigns a value by using automatic numbering functionality.
Transaction ID	Select the component transfer navigation definition that is associated with the role type.
Enabled Role Icon and **Disabled Role Icon**	Select an image to visually indicate the role status in various parts of the PeopleSoft Enterprise CRM system, such as in the Relationship Viewer and Customer Data Management components.
Cascade Option	Select *Cascade* to have the system automatically update addresses for all related business objects whenever you update an address for a business object.

For example, when a company changes its address, the addresses for all company contacts that have the same address are automatically updated.

Warning! Selecting this option results in multiple database operations being triggered when you update contact methods and can severely degrade system performance. PeopleSoft recommends that you enable this option only before a primary address change and disable it immediately afterward.

Publish EIP(publish enterprise integration point)
Select to include the role data when publishing a Customer Data Management (CDM) application message. If a business object has several roles, you can use this option to limit the roles for which data is published.

Join Indicator
Select to indicate a role that is assigned to a business object that exists primarily to group participant business objects. For example, you might create a household business object to group the people who live at a specific address.

Participant Indicator
Select to indicate a role that is assigned to business objects that participate in relationships with a business object that has a joining role. For example, you might create a household member role to assign to the people who live at a specific address.

Capture Contact Methods
Select to indicate that you want to capture contact methods for this role type.

Enabled for Basic Data
Select to automatically run the Enterprise PeopleTools BO_BAS_LOAD Application Engine process to update the basic data tables (BO_BASIC_ORG and BO_BASIC_IND) whenever data that pertains to this role is updated. Basic data is used to integrate with PeopleSoft Enterprise Marketing and PeopleSoft Enterprise Online Marketing and is used by mobile applications.

If you do not select this option, you must manually run the application engine process.

See Chapter 2, "Understanding Business Object Relationship Model Components," Basic Data Tables, page 11.

Enabled for Quick Create
Select to enable the quick create function to use this role.

Note. This option is disabled for the partner role.

SetID Required
Select to require the entry of a setID when creating a business object with this role by using the quick create function.

See Chapter 13, "Using Business Object Search and Quick Create Functionality," page 235.

Application Class ID and **Application Class Path**
Select the ID and path for the application class that encapsulates the business logic of the role that is denoted by this role type. For example, the contact role is supported by the contact application class.

Package Tree Viewer
Click to view the available application classes that are provided by PeopleSoft Enterprise CRM. When you click this link, the Application Packages Lookup page appears.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, "Using Application Classes".

Secure Record Name
Enter a record name to enable setID security searching.

Status Record Enter the name of the record that contains the role status. This enables business object searching by status.

Status Field Name Enter the name of the field that contains the role status. This enables business object searching by status.

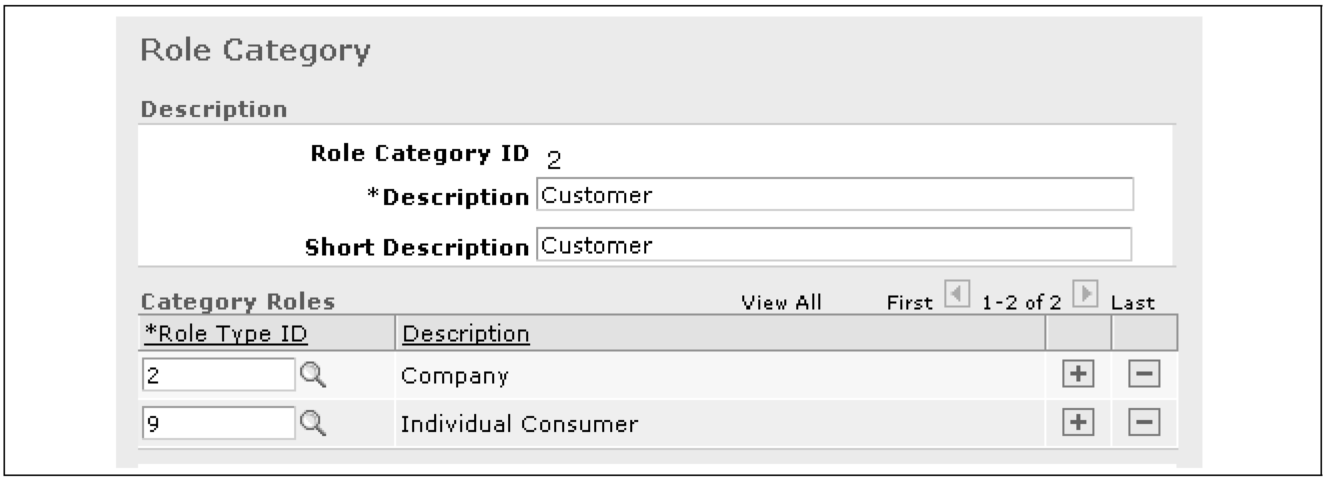
See Also

Chapter 3, “Defining Control Values for Business Objects,” Defining Component Transfer Navigation , page 33

Chapter 13, “Using Business Object Search and Quick Create Functionality,” page 235

Modifying and Adding Role Categories

Access the Role Category page.



Role Category page

\iWhen you open a role category record that is delivered as system data, the record information appears in a display-only format. To update the system data record, click the Modify System Data button.

Important! PeopleSoft does not support changes made to the system data that is delivered with PeopleSoft Enterprise CRM.

Role Category ID Displays the identification code that is associated with the business object role category. When you add a new role category, the system automatically assigns a value by using automatic numbering functionality.

Defining Relationship Types and Relationship Categories

To define relationship types and relationship categories, use the Relationship Type (BO_REL_TYPE) and Relationship Category (BO_REL_CATEGORY) components.

This section discusses how to:

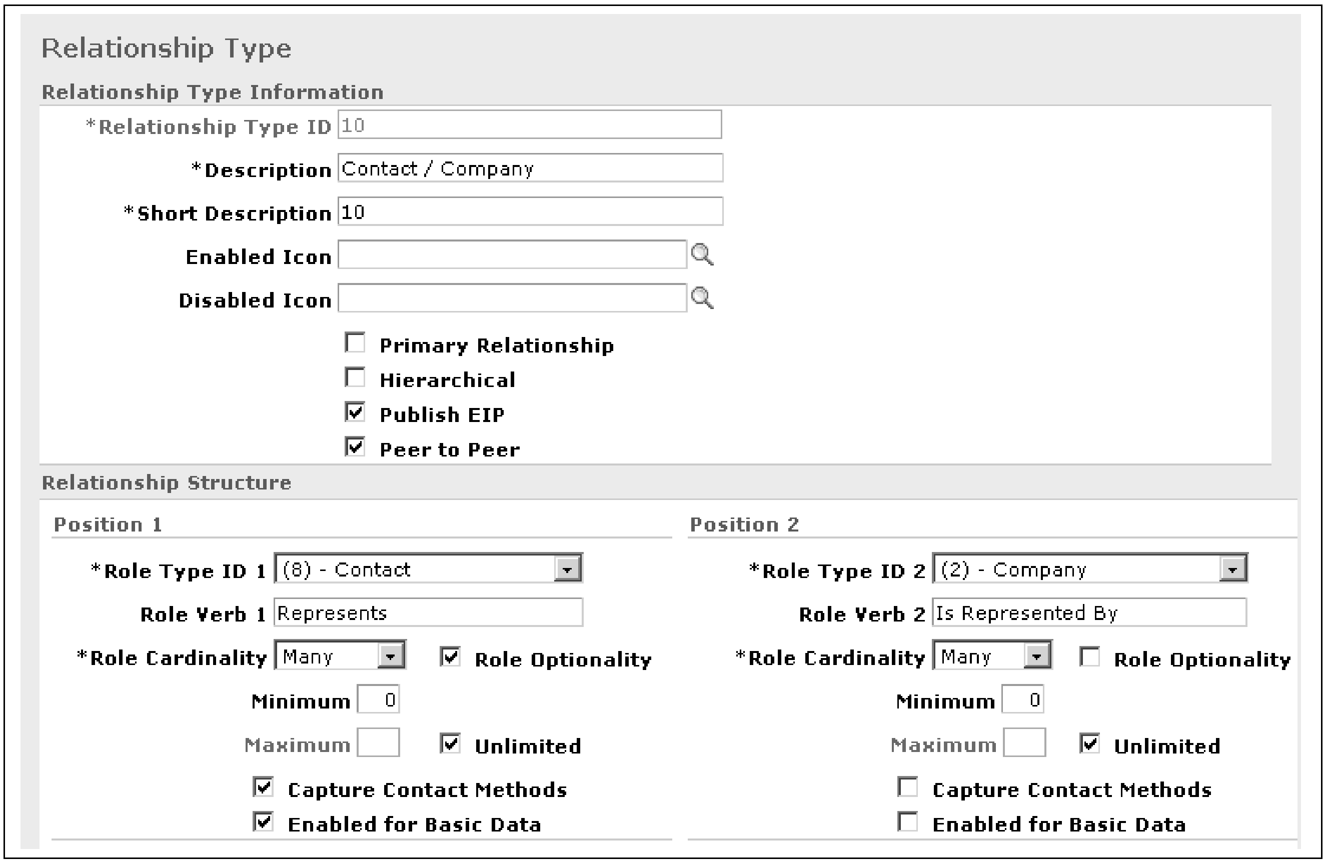
- Modify and adding relationship types.
- Define relationship categories.

Pages Used to Define Relationship Types and Relationship Categories

Page Name	Object Name	Navigation	Usage
Relationship Type	BO_REL_TYPE	Set Up CRM, Common Definitions, Customer, Relationship Type, Relationship Type	Modify and add relationship types.
Relationship Category	BO_REL_CATEGORY	Set Up CRM, Common Definitions, Customer, Relationship Category, Relationship Category	Define categories of relationships.

Modifying and Adding Relationship Types

Access the Relationship Type page.



Relationship Type page

When you open a relationship type record that is delivered as system data, the record information appears in a display-only format. To update the system data record, click the Modify System Data button.

Important! PeopleSoft does not support changes made to the system data that is delivered with PeopleSoft Enterprise CRM.

Relationship Type ID Displays the identification code that is associated with the relationship type.

Primary Relationship Indicates that the relationship is coupled with another relationship type. Only one primary relationship can exist at one time; all others are secondary, with a different relationship type. When you select Primary Relationship, another field appears where you can enter the secondary relationship type.

Hierarchical Select to define a hierarchical relationship. Relationship hierarchies show parent-child relationships between business objects and are graphically represented with a tree format in the relationship viewer. In hierarchical relationships, the business object participating in the Role Type ID 1 field is interpreted as the parent, and the business object in Role Type ID 2 is the child.

Peer to Peer Select to define a peer-to-peer relationship. Peer-to-peer relationships are appropriate between two business objects with a type of *Individual* that share a direct relationship to a third business object.

Publish EIP Select to include the relationship data when publishing a CDM application message.

Relationship Structure

A relationship is formed between two business objects, each of which plays a specific role in the relationship. The relationship structure defines the two role types that define the relationship type, together with cardinality information—the number of business objects that can participate in a specified role for the relationship type.

Role Type ID 1 and **Role Type ID 2** Select the role types that can participate in the relationship. Role types are established on the Role Type page.

Role Verb 1and**Role Verb 2** Enter a verb clause that describes the role played by business objects participating in the relationships of this type.

Role Cardinality Select the number of business objects that can participate in the relationship role: *One* or *Many.* If the value is *One* for role type 1 or 2, only one business object is defined in the specified role for a given instance of the relationship. If the value is *Many,* you can define minimum and maximum values for the number of business objects that are defined in the specified role.

Role Optionality Select if this type of relationship is required when adding a role of the type chosen.

Minimum and **Maximum** Enter the minimum and maximum values for the number of objects that can participate in this relationship. If there is no maximum constraint, select the Unlimited check box.

Capture Contact Methods Select the parties in the relationship for which you want to capture contact methods. For example, when capturing the contact methods for a contact in a relationship with a company, you do not specify a relationship contact method for the company, but you do specify a relationship contact method for the contact.

Enabled for Basic Data PeopleSoft Enterprise CRM uses this field in system data to determine whether a summarization of information (basic data) is stored for the relationship. Basic data is used to integrate with PeopleSoft Enterprise Marketing and PeopleSoft Enterprise Online Marketing and is used by mobile applications.

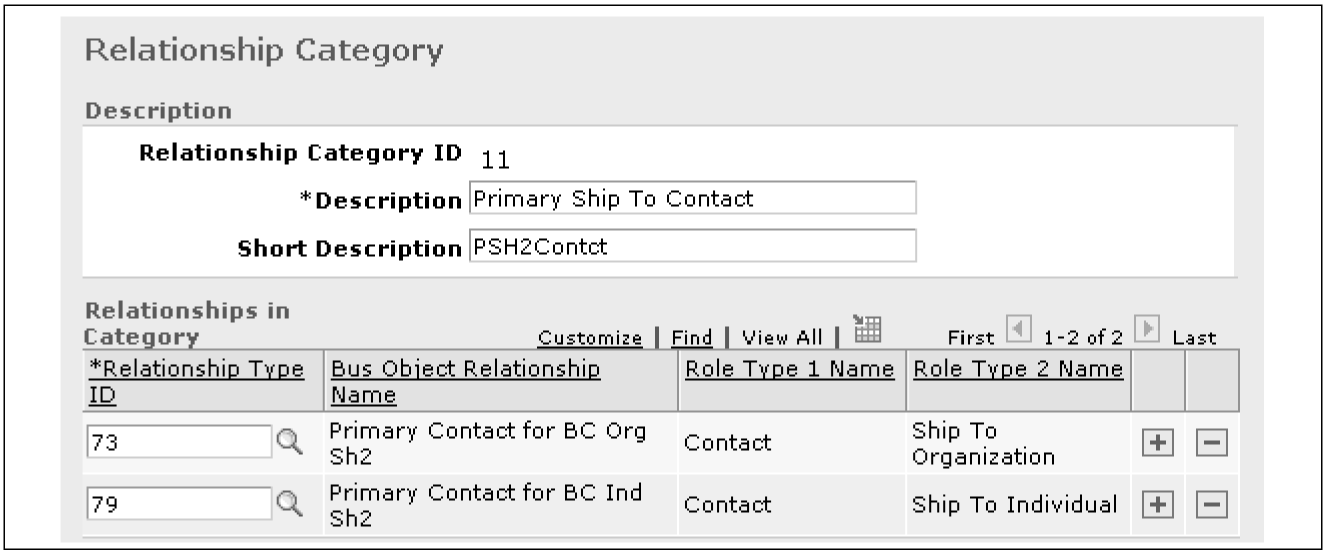
Note. To use the relationship viewer with a specific role type, configure the role in a relationship by using the Configure Relationship Views component, which you access by selecting Set Up CRM, Common Definitions, Customer.

See Also

Chapter 7, “Working with the Relationship Viewer,” page 93

Defining Relationship Categories

Access the Relationship Category page.



Relationship Category page

When you open a relationship category record that is delivered as system data, the record information appears in a display-only format. To update the system data record, click the Modify System Data button.

Important! PeopleSoft does not support changes made to the system data that is delivered with PeopleSoft Enterprise CRM.

Relationship Category ID	Displays the identification code that is associated with the relationship category. When you add a new relationship category, the system automatically assigns a value by using automatic numbering functionality.

Configuring Address Books

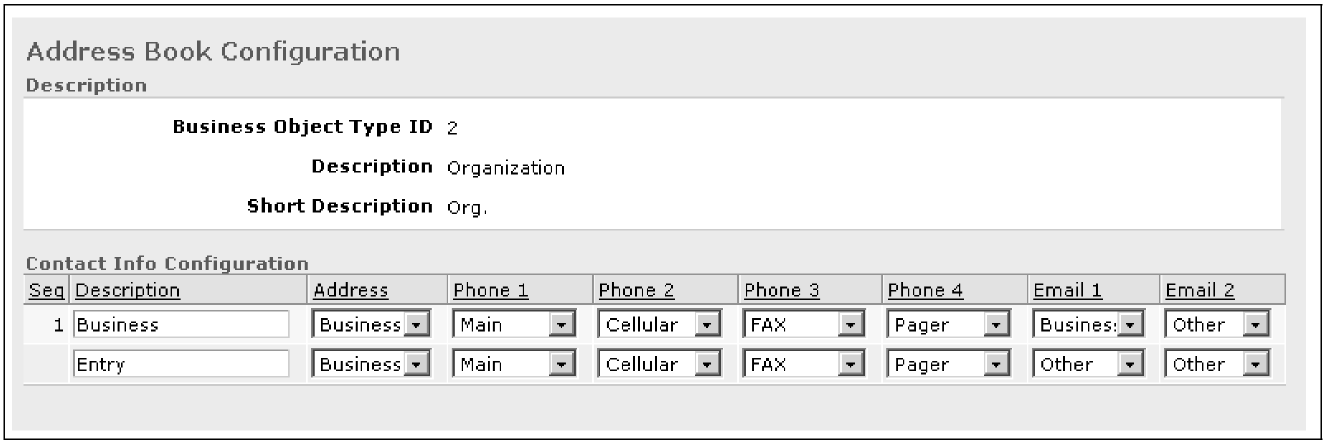
This section discusses how to define contact information entries.

Page Used to Configure Address Books

Page Name	Object Name	Navigation	Usage
Address Book Configuration	BO_TYPE_ABE	Set Up CRM, Common Definitions, Customer, Address Book Configuration, Address Book Configuration	Define contact information entries for a business object type.

Defining Contact Information Entries

Access the Address Book Configuration page.



Address Book Configuration page

Contact Info Configuration

Description Enter a description to uniquely identify a contact information entry for the business object type. The contact method types that you select become the default labels on the Contact Info (contact information) page. You can change these labels when you enter information for these contact method information.

See Also

Chapter 4, “Defining Name and Address Information for Business Objects,” Address Books in PeopleSoft Enterprise CRM, page 46

Chapter 4, “Defining Name and Address Information for Business Objects,” Contact Information for Business Objects, page 47

Setting Up Contact Methods

To set up contact methods, use the Contact Method Type (CM_TYPE), Contact Method Purpose Type (CM_PURPOSE_TYPE), and Contact Method Use (CM_USE) components.

This section discusses how to:

- Maintain contact method uses.
- Modify and add contact method types.

- Maintain or add contact method purpose types.

Pages Used to Set Up Contact Methods

Page Name	Object Name	Navigation	Usage
Contact Method Use	CM_USE	Set Up CRM, Common Definitions, Customer, Contact Method Use, Contact Method Use	Maintain contact method uses.
Contact Method Type	CM_TYPE	Set Up CRM, Common Definitions, Customer, Contact Method Type, Contact Method Type	Maintain contact method types.
Contact Method Purpose Type	CM_PURPOSE_TYPE	Set Up CRM, Common Definitions, Customer, Contact Method Purpose Type, Contact Method Purpose Type	Maintain or add contact method purpose types.

Maintaining Contact Method Uses

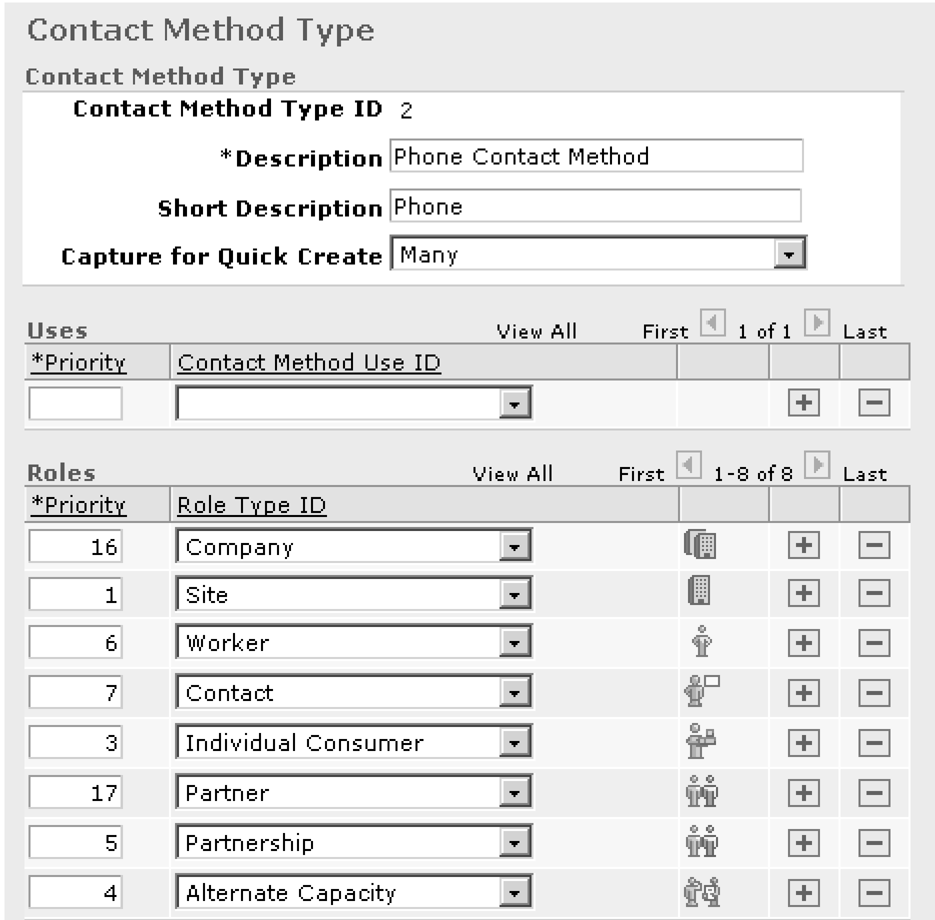
Access the Contact Method Use page.

Description Enter a description for the contact method use.

Use Icon Select the icon that you want to associate with this contact method use. After you select the icon, the actual icon appears to the right of the field.

Modifying and Adding Contact Method Types

Access the Contact Method Type page.



Contact Method Type page (1 of 2)

Contact Method Type page (2 of 2)

When you open a business object contact method type record that is delivered as system data, the record information appears in a display-only format. To update the system data record, click the Modify System Data button.

Important! PeopleSoft does not support changes made to the system data that is delivered with PeopleSoft Enterprise CRM.

Contact Method Type

Information about the contact method type appears in this page region.

Contact Method Type ID Displays the identification code that is associated with the contact method type. When you add a new contact method type, the system assigns a value by using automatic numbering functionality.

Uses

If you define contact method uses, you can associate uses with the contact method here.

Contact Method Use ID Select the contact method uses that you want to associate with the contact method type.

Roles

Displays the roles that are associated with a contact method and enables you to add new roles or modify existing ones.

Priority Enter a priority for listing the role on the contact method detail pages.

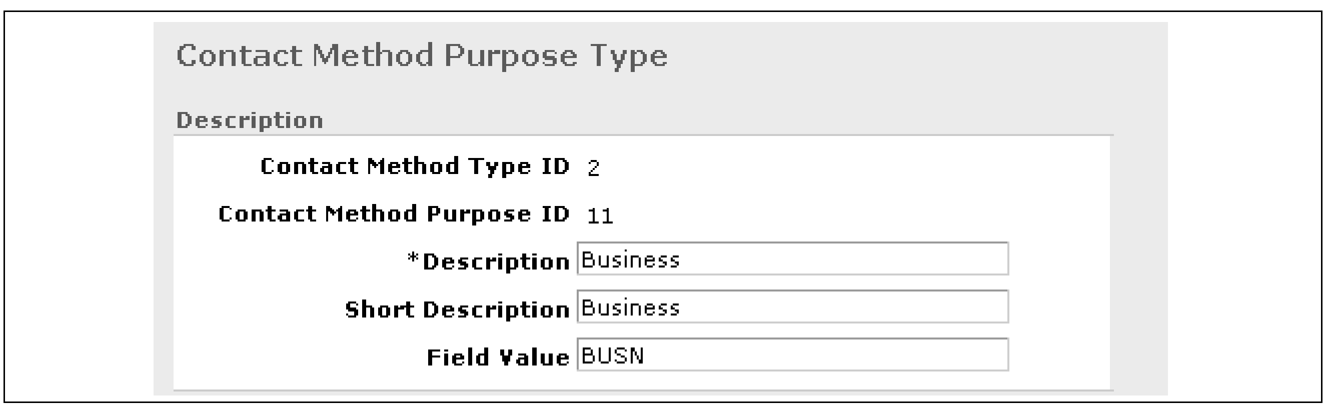
Relationships

Displays the relationships that are associated with a contact method and enables you to add new relationships or modify existing ones.

Priority Enter a priority for listing the relationship on the contact method detail pages.

Maintaining or Adding Contact Method Purpose Types

Access the Contact Method Purpose Type page.



Contact Method Purpose Type page

When you open a contact method purpose type that is delivered as system data, the record information appears in a display-only format. To update the system data record, click the Modify System Data button.

Important! PeopleSoft does not support changes made to the system data that is delivered with PeopleSoft Enterprise CRM.

Contact Method Type ID Displays the contact method type with which the contact method purpose is associated.

Contact Method Purpose ID Displays the identification code that is associated with the contact method purpose type. When you add a contact method purpose type, the system assigns a value by using automatic numbering functionality.

Field Value Enter a value to map contact method purpose types in PeopleSoft Enterprise CRM to corresponding translate values in PeopleSoft Supply Chain Management and third-party systems.

Defining Component Transfer Navigation

To define component transfer navigation, use the Component Navigation (RB_TXN_DEFN) component.

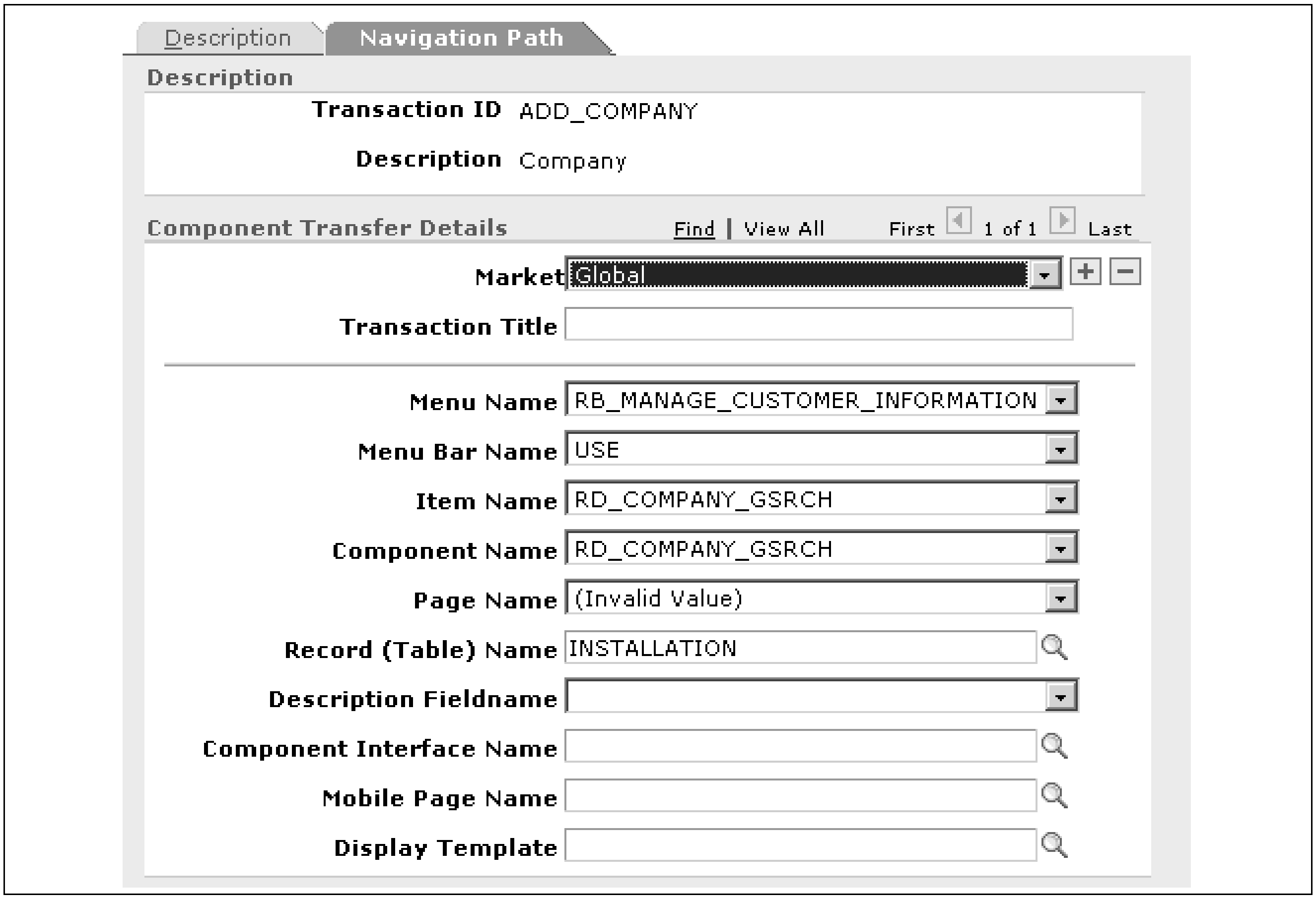
This section discusses how to define component transfer navigation paths.

Pages Used to Define Component Transfer Navigation

Page Name	Object Name	Navigation	Usage
Component Navigation - Description	RB_TXN_DEFN	Set Up CRM, Common Definitions, Component Configuration, Component Navigation, Description	Maintain component transfer navigation descriptions.
Component Navigation - Navigation Path	RB_TXN_MKT	Set Up CRM, Common Definitions, Component Configuration, Component Navigation, Navigation Path	Define component transfer navigation paths (the locations of the transaction pages to which users are transferred).

Defining Component Transfer Navigation Paths

Access the Component Navigation - Navigation Path page.



Component Navigation - Navigation Path page

Note. To enable component transfers, enter a value for each of the fields on this page.

Market

Specify the name of the market with which the component is associated. A component is uniquely identified by its name and its market association. You can add records for each market.

Menu Name, Menu Bar Name, Item Name, Component Name, and **Page Name**

Enter the complete navigation for the page to which the users transfer. Enter the PeopleTools object names for the menu, menu bar, item name, component name, and page name.

Record (Table) Name

Select the object name for the table that is populated by the specified page. Typically, this is the search record.

Defining Segment Codes

To define segment codes, use the Segment Code (RD_SEGMENT) component.

This section discusses how to define segment codes.

Page Used to Define Segment Codes

Page Name	Object Name	Navigation	Usage
Segment Code	RD_SEGMENT	Set Up CRM, Common Definitions, Customer, Segment Code, Segment Code	Define codes representing customer attributes, such as a customer's market segment, priority, or value. For informational purposes, you can associate each company and consumer with a segment code.

Defining Segment Codes

Access the Segment Code page.

Segment codes enable you to define customer attributes that are important for your business objectives. For example, you can use segment codes to define a customer's market segment, priority, or total value to your enterprise. Segment codes are informational in PeopleSoft Enterprise CRM. However, you can develop reports based on the segment codes that are associated with your customers.

Defining Industries

To define industries, use the Industry (RSF_INDUSTRY) component.

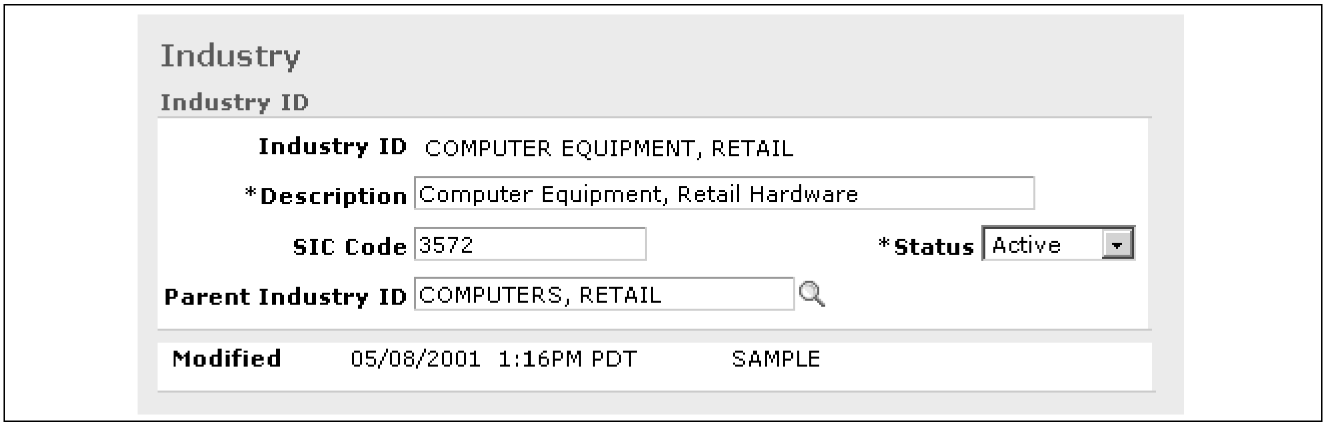
This section discusses how to define industries.

Page Used to Define Industries

Page Name	Object Name	Navigation	Usage
Industry	RSF_INDUSTRY	Set Up CRM, Common Definitions, Customer, Industries, Industry	Define industries.

Defining Industries

Access the Industry page.



Industry page

SIC Code(standard industry code)	Enter the standard industry code for this industry.
Parent Industry ID	Enter the parent industry for this industry.

See Also

Chapter 8, “Defining Company Business Objects ,” page 107

Defining National ID Types

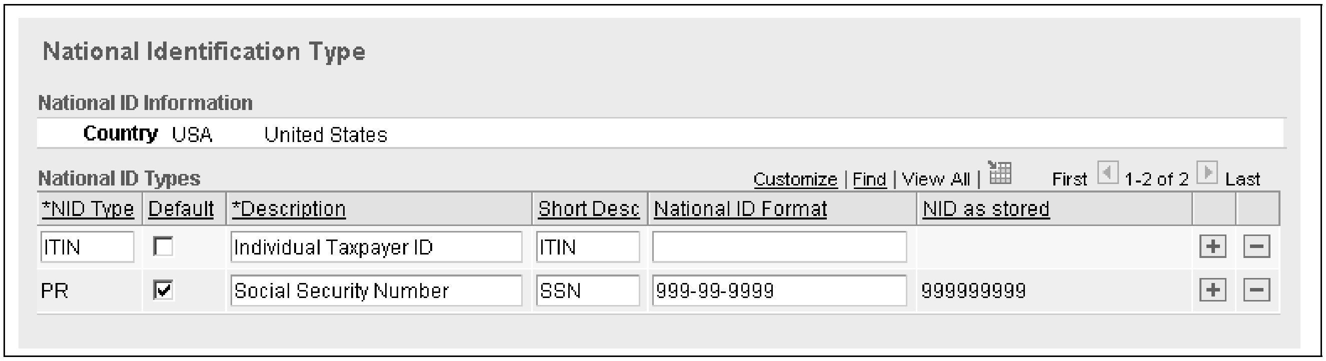
This section discusses how to define national ID types.

Page Used to Define National ID Types

Page Name	Object Name	Navigation	Usage
National ID Type Table	NID_TYPE_TABLE	Set Up CRM, Common Definitions, Customer, National ID Type, National Identification Type	Define national ID types.

Defining National ID Types

Access the National ID Type Table page.



National Identification Type page

NID Type(national identification type) — Enter the type of national ID.

National ID Format — Enter the format for the national ID.

See Also

Chapter 10, "Defining Person Business Objects," Defining Information for Business Contacts, page 139

Defining Customer Groups

To define customer groups, use the Customer Group Table (CUST_GROUP_TBL) component.

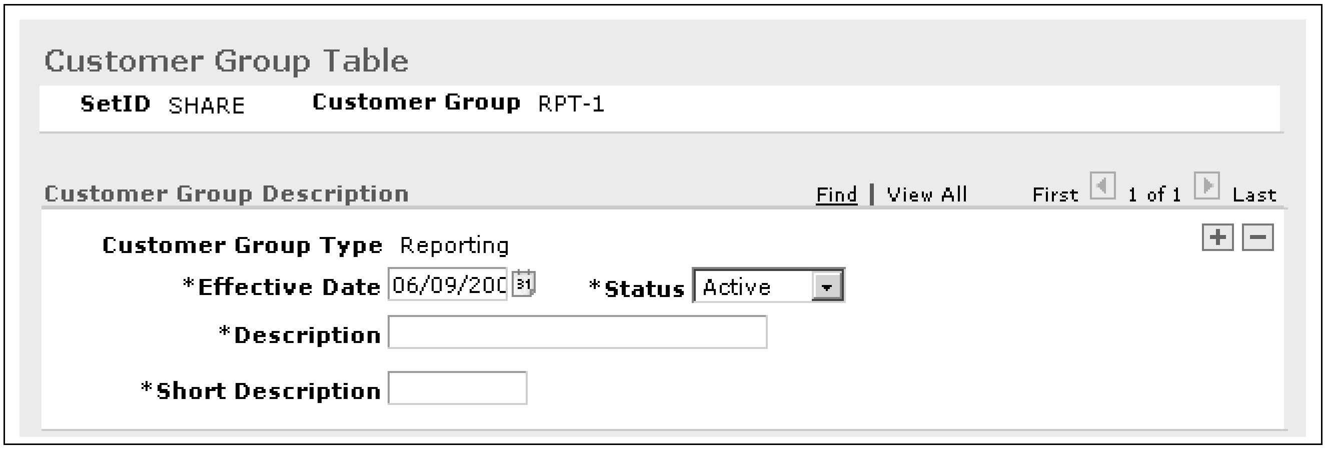
This section discusses how to define customer groups.

Pages Used to Define Customer Groups

Page Name	Object Name	Navigation	Usage
Customer Group Table	CUST_GROUP_TBL	Set Up CRM, Common Definitions, Customer, Customer Group, Customer Group Table	Define customer groups. You can assign customers to groups for reporting and administration purposes.

Defining Customer Groups

Access the Customer Group Table page.



Customer Group Table page

Customer Group Type Enter the type of customer group. Available group types are: Accounting, Allocation Group, Buying Agreement, Direct Debit, Forecasting, Freight, Pricing Arbitration Plan, Reporting, Tax, and Transportation.

Defining Customer Data Management System Options

To define customer data management system options, use the Customer Data Management System Options (BO_INSTALLATION) component.

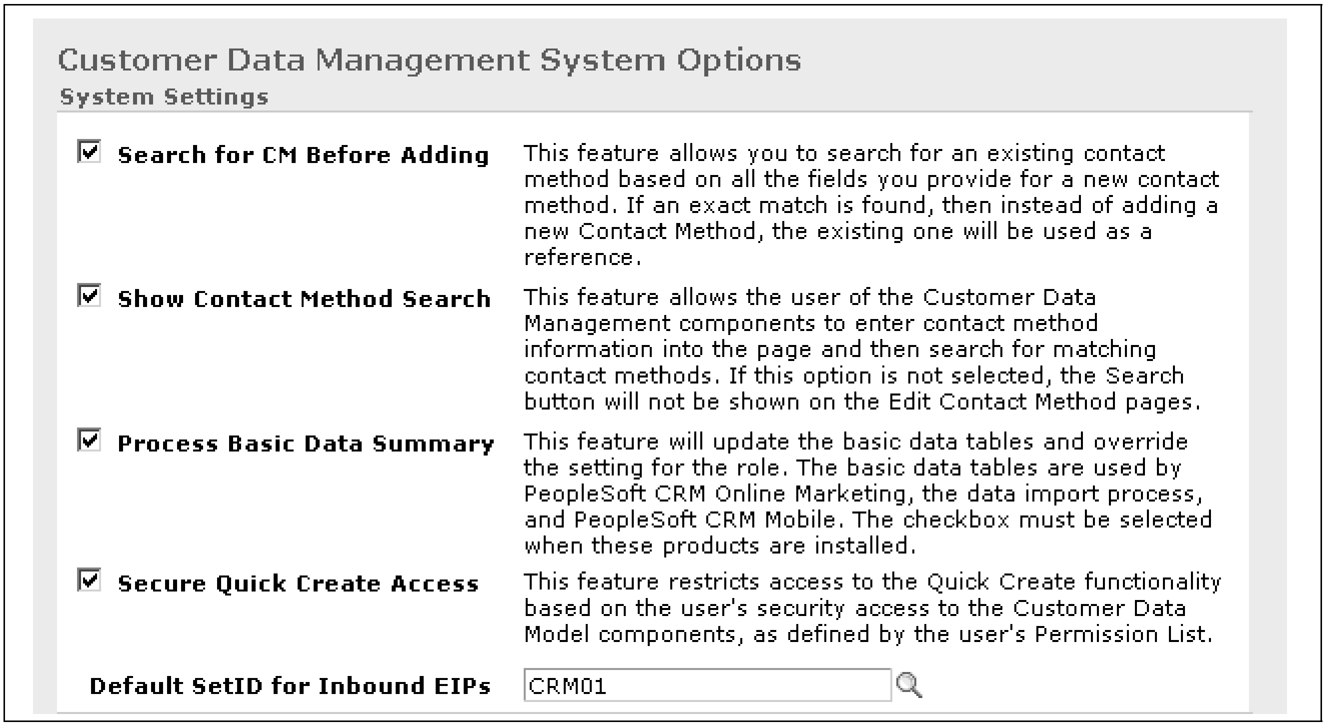
This section discusses how to define customer data management system options.

Page Used to Define Customer Data Management System Options

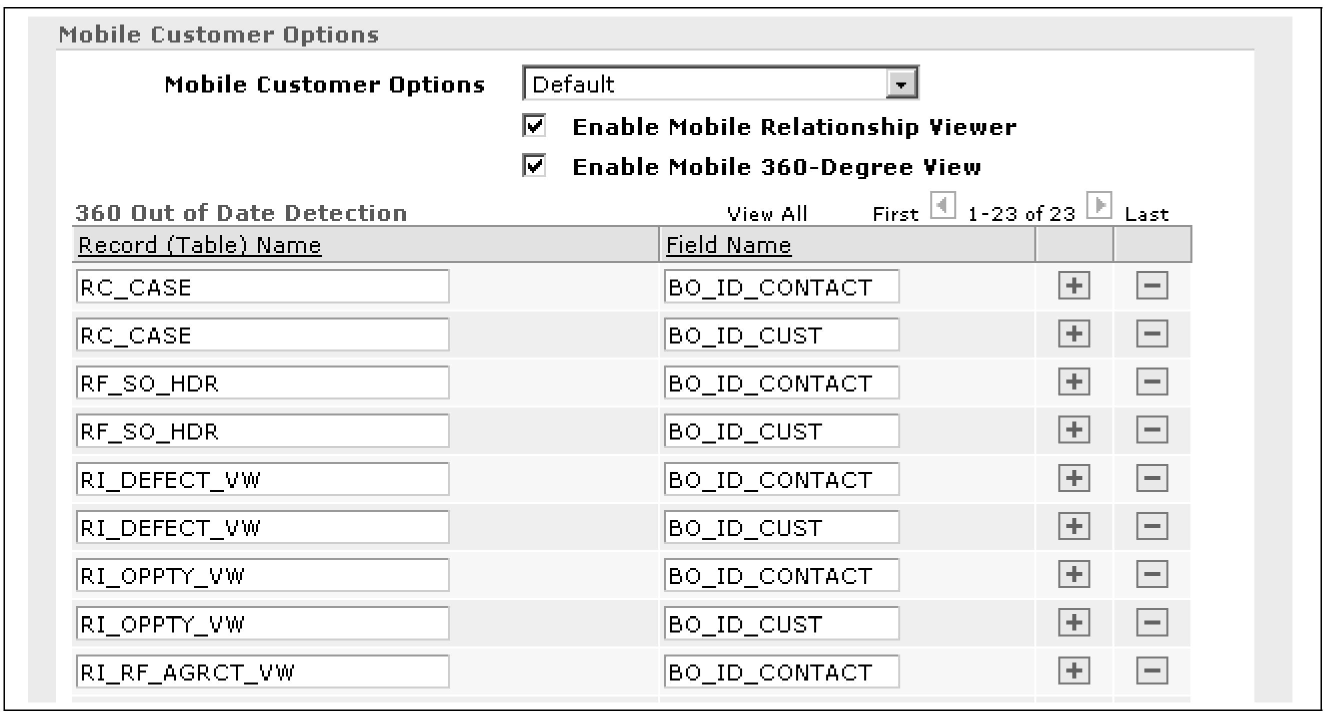
Page Name	Object Name	Navigation	Usage
Customer Data Management System Options	BO_INSTALLATION	Set Up CRM, Common Definitions, Customer, Customer Installation Options, Customer Data Management System Options	Define customer data management system options.

Defining Customer Data Management System Options

Access the Customer Data Management Systems Options page.



CDM System Options page (1 of 2)



CDM System Options page (1 of 2)

This screen shot only captures the first few rows of the 360 Out of Date Detection grid.

System Settings

Process Basic Data Summary Select to update basic data tables during data import. Selecting this option here overrides the setting for the role. The basic data tables are used by PeopleSoft Enterprise CRM Online Marketing, the data import process, and PeopleSoft Enterprise CRM Mobile.

Note. Clear this check box if you are not using any of these processes. This improves system performance.

Default SetID for Inbound EIPs(default setID for inbound enterprise integration points)

Select the default setID. The CDM EIPs use this setID during the processing of the EIPs if no setID is provided on the incoming application messages.

See Chapter 16, "Managing Enterprise Integration for PeopleSoft Enterprise CRM ," page 269.

Mobile Customer Options

Mobile Customer Options

Select the mobile customer option for which you want to establish system level defaults.

See *PeopleSoft Enterprise CRM 8.9 Mobile Applications PeopleBook*, "Setting Up Data Distribution for a Mobile Device," Defining Mobile Customer Options.

Enable Mobile Relationship Viewer

Select to enable the relationship viewer in PeopleSoft Enterprise CRM Mobile.

Enable Mobile 360 Degree View

Select to enable the 360-degree view in PeopleSoft Enterprise CRM Mobile.

Mobile 360 Out-of-Date Detection Record Fields

Enter the records and fields that are used by PeopleSoft Enterprise CRM Mobile to check for out-of-date detection.

The records and fields equate to a portion of the 360-degree view tree. Currently, the PeopleSoft system provides these seven records and fields:

- RC_CASE (record) and BO_ID_CONTACT (field).
- RC_CASE (record) and BO_ID_CUST (field).
- RF_SO_HDR (record) and BO_ID_CONTACT (field).
- RF_SO_HDR (record) and BO_ID_CUST (field).
- RSF_LEAD (record) and BO_ID_CUST (field).
- RSF_OPPORTUNITY (record) and BO_ID_CONTACT (field).
- RSF_OPPORTUNITY (record) and BO_ID_CUST (field).

See Also

PeopleSoft Enterprise CRM 8.9 Mobile Applications PeopleBook, "Working with Customer and Product Information on a Mobile Device"

Defining Basic Data Mappings

This section discusses how to:

- Map CDM properties to basic data tables.
- Clone basic data mappings.

See Also

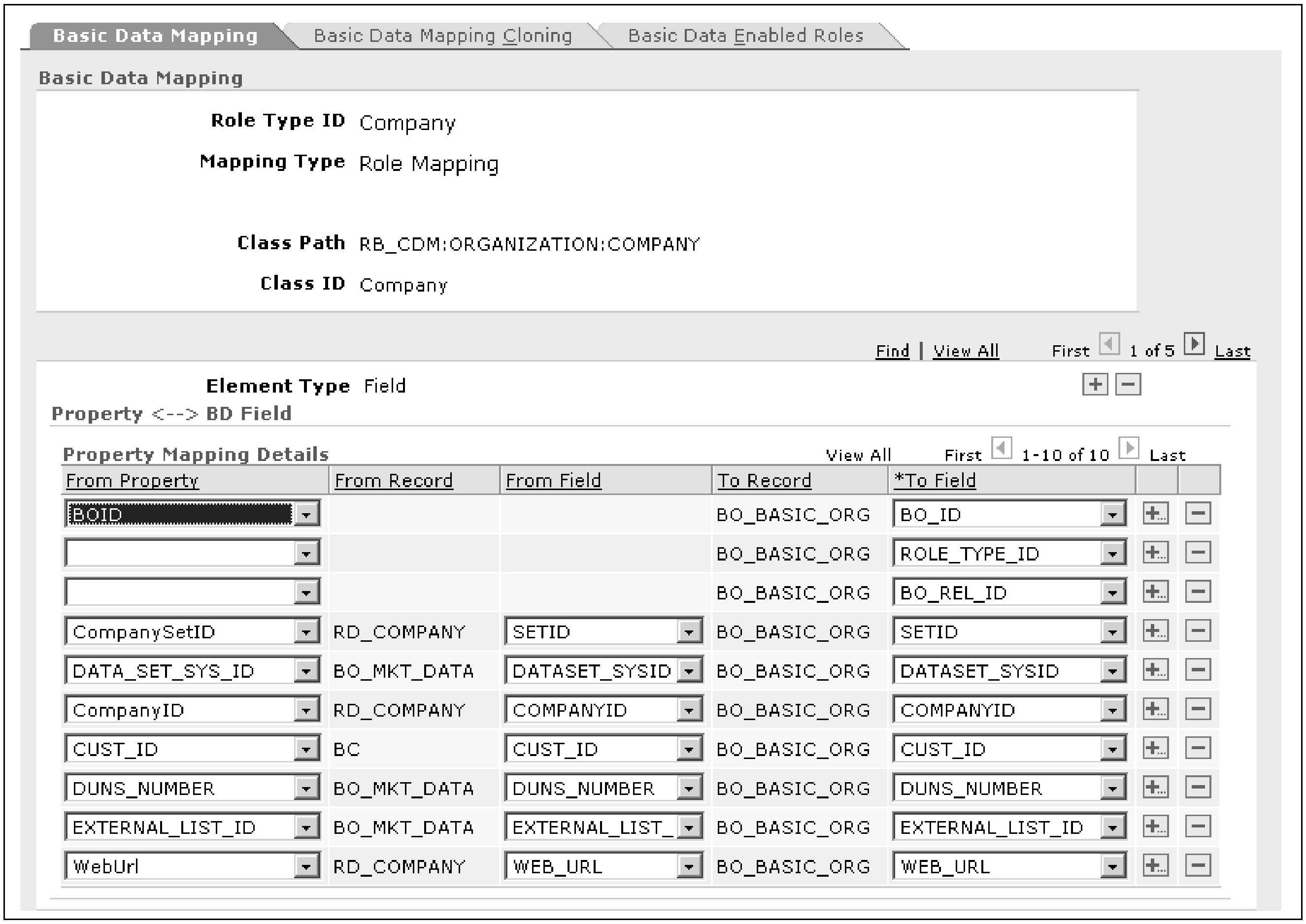
Chapter 2, "Understanding Business Object Relationship Model Components," Basic Data Tables, page 11

Pages Used to Define Basic Data Mappings

Page Name	Object Name	Navigation	Usage
Basic Data Mapping	BO_ROLE_MAP	Set Up CRM, Common Definitions, Customer, Basic Data Mapping, Basic Data Mapping	Map CDM role and relationship properties to basic data tables.
Basic Data Mapping Cloning	BO_ROLE_MAP_CLONE	Set Up CRM, Common Definitions, Customer, Basic Data Mapping, Basic Data Mapping Cloning	Clone an existing mapping to a new mapping.
Basic Data Enabled Roles page	BO_ROLE_MAP_ENABLE	Set Up CRM, Common Definitions, Customer, Basic Data Mapping, Basic Data Enabled Roles	View a summary list of the basic data mapping roles and relationships.

Mapping CDM Properties to Basic Data Tables

Access the Basic Data Mapping page.



Basic Data Mapping page

Use this page to map properties from CDM records and fields to basic data records and fields. You can map either by role or relationship.

Basic Data Mapping

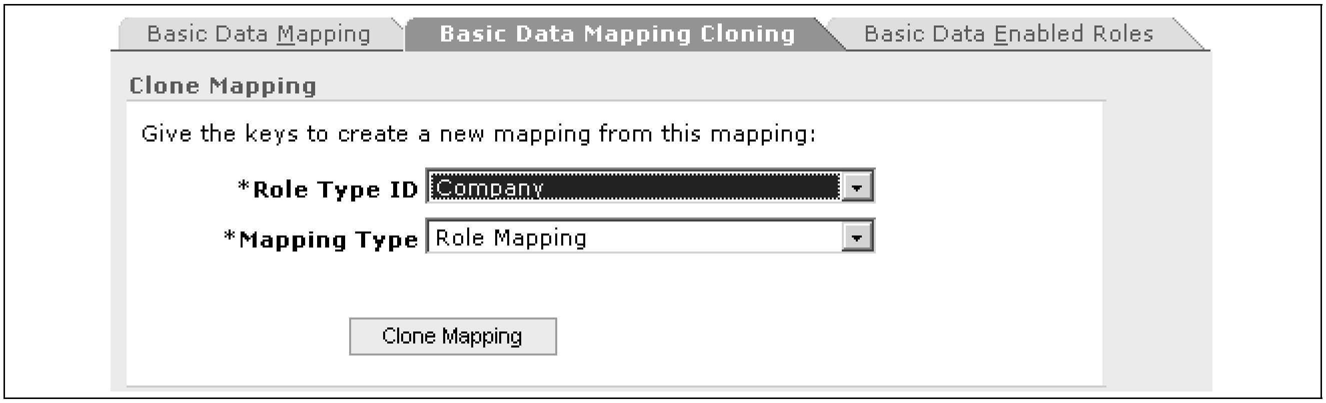
Information about the roles and relationships you are mapping appears in this page region. This is system data that you cannot modify on this page.

Property Mapping Details

Specify the source record and field and the target record and field for each property that is mapped.

Cloning Basic Data Mappings

Access the Basic Data Mapping Cloning page.



Basic Data Mapping Cloning page

Clone Mapping

Select a role type and a mapping type to clone the current mapping that appears on the Basic Data Mapping page to another role type. For a mapping type of *Relationship Mapping*, the Relationship ID field appears.

You cannot overwrite an existing mapping by cloning a new mapping to it; the role type and mapping type you specify must not currently exist in the system.

CHAPTER 4

Defining Name and Address Information for Business Objects

This chapter provides an overview of name and address information in PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM) and discusses how to:

- Update name information for business objects.
- View summary contact information.
- Maintain address books for business objects.
- Define customer contacts.
- Define customer sites.

Understanding Name and Address Information in PeopleSoft Enterprise CRM

This section lists common elements and discusses:

- Business object names in PeopleSoft Enterprise CRM.
- Address books in PeopleSoft Enterprise CRM.
- Contact information for business objects.
- Contact information for business object relationships.

See Also

Chapter 8, "Defining Company Business Objects ," page 107

Chapter 9, "Defining Site Business Objects ," page 117

Chapter 10, "Defining Person Business Objects," page 127

Common Elements Used in this Chapter

Primary Name — The name that appears online when the business object is referenced in system transactions.

Contact Method Type — A method by which you contact a business object. PeopleSoft Enterprise CRM provides the *Address, Phone,* and *Email* contact methods with the system. You can define additional contact methods as needed.

Contact Method Purpose Type
A further clarification of a contact method. As delivered, the *Home* and *Business* contact method purpose types are available for the Email contact method and the types *Home, Business, Fax,* and *Pager* contact method purpose types are available for the Phone contact method. PeopleSoft Enterprise CRM provides additional contact method purpose types that you can configure and you can define additional types as needed.

See Chapter 3, "Defining Control Values for Business Objects," Contact Method Types and Contact Method Purpose Types, page 18.

Contact Info Entry (contact information entry)
A grouping of contact methods. As they're delivered, contact information entries in PeopleSoft Enterprise CRM can contain one address, up to two email addresses, and up to four phone numbers.

See Chapter 3, "Defining Control Values for Business Objects," Configuring Address Books, page 28.

Address Book
The collection of all contact information entries that are defined for a business object, business object site, or business object contact.

Consumer
A person business object that has the consumer role.

Business Object Names in PeopleSoft Enterprise CRM

When you initially create a new company, consumer, contact, site, or worker business object, you enter the business object name. This becomes the primary name for the business object and appears on the Summary page of the component. To edit this name, add additional names, or designate another name as primary, access the More Names page from the Details page of the component.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook,* "Implementing Alternate Character" and Chapter 3, "Defining Control Values for Business Objects," Defining Name Types for Business Objects, page 21.

Address Books in PeopleSoft Enterprise CRM

In PeopleSoft Enterprise CRM, you define an address book for each business object. An address book for a business object functions in the same way as a personal address book. For example, someone named Larry Hill might give you his home address, email, and telephone number. If you need to get in touch with Larry during the daytime or send him business correspondence, he might also give you a work address, cell phone number, pager number, and work email. If Larry operates out of two offices, you keep an address book entry for each of Larry's offices as well as for his home address. You can maintain address books for business objects and for sites and contacts of business objects.

The Address Book page that appears on a component enables you to manage the contact information for the business object and its associated sites and contacts. You click the description for an entry to view and edit the entry's details or you can create a new entry. The advanced options that are on the Address Book page enable you to manage contact methods independently of the contact information entry in which they are defined.

Note. If an Individual business object or an organizational business object (Partner/Company) has multiple roles, then the contact information will default to both roles. So if Larry is a contact and a consumer, and you add a phone number, that phone number, by default will apply to both roles. The exception is the worker role. Since there may be security issues around the worker role, information does not default to or from this role. So if Larry is both a worker and a consumer, and you add a phone in the Worker component, it will only apply to Larry in the role of worker, not consumer.

Contact Information for Business Objects

Contact information entries from a business object's address book appear on the component's summary page. The summary contact information presents the address, two email address, and all four phone numbers. To view the complete contact information for a business object, you must use the Contact Info page that you can access either by clicking the More Info link on the Summary page or by accessing the Address Book page.

By default, the first contact information entry that is in the address book appears for organization type business objects, and the first and second contact information entries appear for individual type business objects. You can select the contact information entry that appears on the summary page by clicking the Set Display link.

See Chapter 3, "Defining Control Values for Business Objects," Defining Contact Information Entries, page 29.

Contact Info Details

The Contact Info page enables you to view and update additional address, email, and phone contact information for an entry that is in the address book or to access additional entries. This page is the primary place where you maintain contact information for a business object. You can enter or update details of the contact methods that are associated with the business object or click the trash can button to cause all of the contact methods that are within the contact information entry to expire on the current date.

Note. When you remove a contact method, its end date is set to the current date, thereby inactivating the contact method. This occurs only if the contact method is not in any other active Contact Info entry. After you inactivate a contact method, the only way to reactivate it is by changing the start and end dates that are available within the Address Book Advanced Options section.

See Chapter 3, "Defining Control Values for Business Objects," Setting Up Contact Methods, page 29.

You can define purchasing options for the address if the CRM installation includes Order Capture.

See Chapter 5, "Defining Purchasing Options for Companies, Consumers, and Sites," page 63.

Advanced Options

When you expand the Advanced Options section on the Address Book page, you see a page with three tabs: Address, Email, and Phone. Each tab lists all the entries that are defined for that particular contact method type. The Edit button that appears for each entry provides the only access to the Contact Method Details page, where you can update the start and end dates for the contact method or associate the contact method with roles independently of the other contact methods in a contact information entry.

Existing Address Searches

You can search for existing addresses when you add or update address information. This enables you to find and modify an address that is similar to an existing address for a company, partner company, site, or person.

To search for an existing address, use one of the following two methods:

1. Enter any known address information, click the Look Up Address link on the Contact Info page for a company, consumer, contact, site, or worker and select an address from the list of existing addresses appears. The system uses the entered information as search criteria and returns any contact method records that match the criteria. You can select the applicable record, or, if none of the returned records apply, create a new contact record.
2. Enter known address information on the Update Address page and search for an existing address.

Note. Depending on the volume of addresses that are in the system and the number of search criteria that is entered, the address search feature can slow system performance.

Contact Method Definition for Business Object Roles

The contact methods that you define at the business object level are automatically associated with the role that the system assigns to the business object. For example, when you establish a business object using the Company component, the system assigns the Company role to the business object and creates contact method records for the role by using the contact information that you define. When you define a site business object by using the Site component or the Sites page in any other component, the system assigns the site role to the business object and records the contact information that you define for the site at both the business object and role levels.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "Setting Up General Options," Setting Up Address Formats and Values

Contact Information for Business Object Relationships

You can define separate contact methods for the relationships between a customer and its contacts or between a customer and its sites.

Contact Method for Customer Contacts

Delivered system transactions enable you to define address books for contact relationships. To do so, you add contacts to companies, partners, consumers, or sites. You then define an address book for the contact relationship.

Address information for a new contact is usually similar to address information that was previously defined in the system. PeopleSoft Enterprise CRM provides you with the capability to search for address information that was previously defined when you add contacts to the business object. For example, when you define a contact for a company, you can use an existing address with perhaps a modified mail stop number for the contact.

See Chapter 4, "Defining Name and Address Information for Business Objects," Defining Customer Contacts , page 57.

Contact Method Definition for Customer Sites

When you create a site for a company, partner, or consumer, you can add any previously existing contact method for the company, partner, or consumer to the site address book. When you add addresses to a site that is within the context of a parent business object, the Address Search button first presents you with a list of addresses that are defined for the parent business object. The user can select one of the site's parent addresses or continue to search for any address within the system.

For example, sites are often created to manage field service activities, such as installation, preventative maintenance, or repair activities. This enables field service technicians to contact the customer site.

See Chapter 4, "Defining Name and Address Information for Business Objects," Defining Customer Sites, page 61.

Updating Name Information

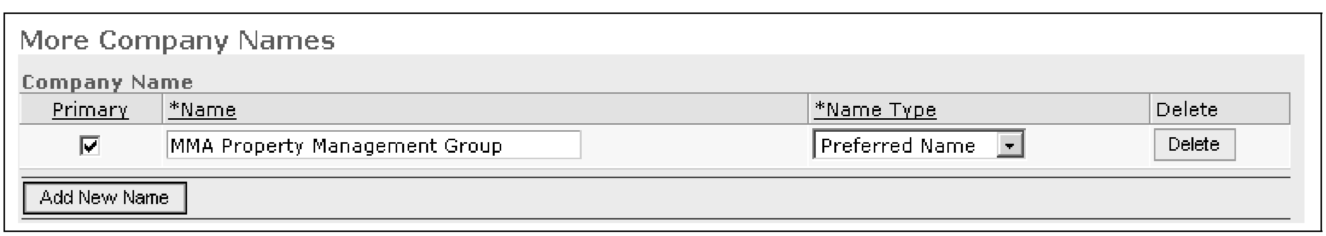
This section discusses how to add and update names.

Pages Used to Update Name Information

Page Name	Object Name	Navigation	Usage
Company - Details	RD_COMPANY_DETAILS	• Customers CRM, Add Company, Company, Details • Customers CRM, Search Company, Company, Summary Click the Details link.	Add or modify a company name.
Person - Details	RD_PERSON_DETAILS	• Customers CRM, Add Person, Person, Details • Customers CRM, Search Person, Person, Summary Click the Details link.	Add or modify a person's name.
Site - Name	RD_SITE_NAME_PG	• Customers CRM, Add Site, Site, Primary Click the Name link. • Customers CRM, Search Site, Site, Primary Click the Name link	Add or modify a site name.
Partner Company - Details	RD_PARTNER_DETAILS	• Partners, Add Partner Company, Partner Company, Details • Partners, Search Partner Company, Partner Company, Summary Click the Details link.	Add or modify a partner company name.
Company - More Names, Person - More Names, Partner Company - More Names, Site - More Names	RD_MORE_NAMES_SEC	Click the More Names link on the Details page for a company, person, or partner company.	• Add and update names. • Designate a primary name.

Adding and Updating Names

Access the More Names page for a company, person, site, or partner company.



More Names page

Primary Select to indicate a primary name for the company or site. The name that you enter on the Detail page when you initially create the component is the default primary name record for the company or site business object.

Name Type Select the type of name, *preferred name* or *alternate name.*

See Chapter 3, "Defining Control Values for Business Objects," Defining Business Object and Name Types, page 20.

Add New Name Click to enter an additional name.

Managing Summary Contact Information

This section lists the pages used to manage summary contact information.

Pages Used to Manage Summary Contact Information

Page Name	Object Name	Navigation	Usage
Company - Summary	RD_COMPANY_SUMMARY	Customers CRM, Search Company, Company, Summary, Summary	View name and primary contact information for a company and the primary contact of the Company (if available).
Company - Details	RD_COMPANY_DETAILS	Customers CRM, Search Company, Company, Summary, Details	Maintain the first contact information entry for the company.
Partner Company - Summary	RD_PARTNER_SUMMARY	Partners, Search Partner Company, Partner Company, Summary, Summary	View name and primary contact information for a partner company and the primary contact of the Partner Company (if available).
Partner Company - Details	RD_PARTNER_DETAILS	Partners, Search Partner Company, Partner Company, Summary, Details	Maintain the first contact information entry for the partner company.
Site - Primary	RD_SITE_MAIN_2	Customers CRM, Search Site, Site, Primary	View name and maintain the first contact information entry of a Site, Service Location in the FIN component, Partnership, or Alternate Capacity business object.
Person - Primary	RD_PRSN_PRIMARY	• Customers CRM, Search Person, Person, Primary • Customers CRM, Add Person, Person, Primary	View name and maintain the first and second contact information entries of a person, worker, or client.

Maintaining Address Books for Business Objects

This section discusses how to maintain address books for business objects.

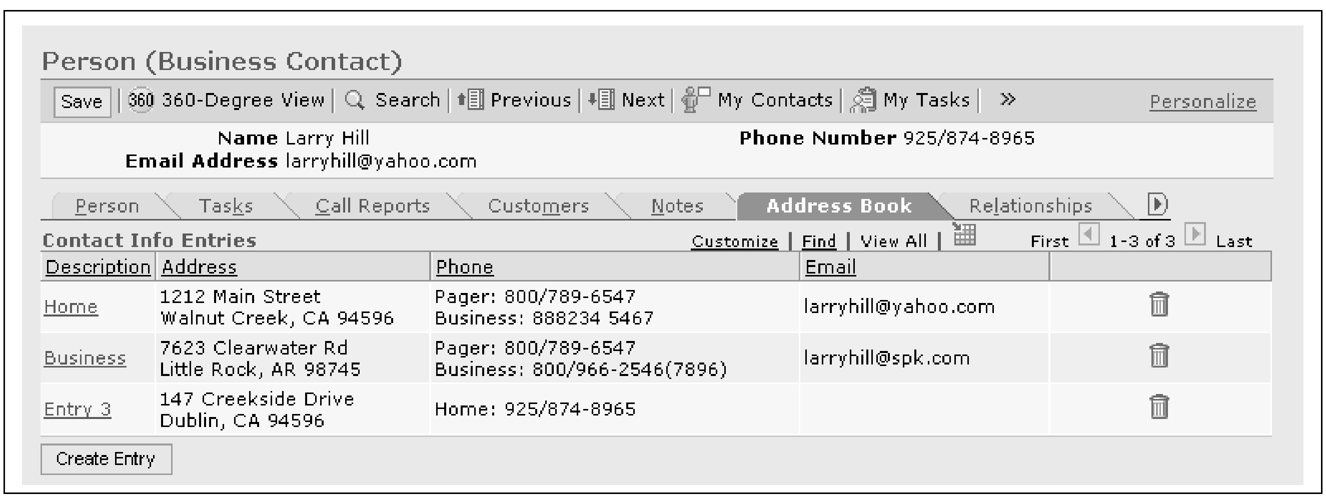
Pages Used to Maintain Address Books

Page Name	Object Name	Navigation	Usage
Person - Address Book	RD_PRSN_ADDR_BOOKS	• Customers CRM, Add Person, Person, Address Book • Customers CRM, Search Person, Person, Address Book	Maintain the address book for a person, worker, or client.
Company - Address Book	RD_COMP_ADDR_BOOK	• Customers CRM, Search Company, Company, Address Book, Addresses • Customers CRM, Add Company, Company, Address Book, Addresses	Maintain the address book for a company.
Partner Company- Address Book	RD_PTNR_ADDR_BOOK	• Customers CRM, Search Partner Company, Partner Company, Address Book, Addresses • Customers CRM, Add Partner Company, Partner Company, Address Book, Addresses	Maintain the address book for a partner company.
Site - Address Book	RD_SITE_ADDR_BOOK	• Customers CRM, Search Site, Site, Address Book, Addresses • Customers CRM, Add Site, Site, Address Book, Addresses	Maintain the address book for a site.
Company - Contact Info, Person - Contact Info, Partner Company - Contact Info, Site - Contact Info	ABE_DETAIL	• Click a Description link in the Contact Info Entry grid on the Address Book page for a company, person, partner company, or site. • Click the Create Entry button on the Address Book page for a company, person, partner company, or site.	Maintain contact information entries in an address book.
Address Search	ABE_ADD_LOOKUP_SEC	Click the Look Up Address link on the Contact Info page for a company, person, partner company, or site.	Select an existing address to use or modify as the address for a company, person, partner company, or site.

Page Name	Object Name	Navigation	Usage
Company - Update Address, Person - Update Address, Partner Company - Update Address, Site - Update Address	RD_ADDR_DETAIL	Expand the Advanced Options section on the Address Book page for a company, person, partner company, or site. Select the Address tab. Click the Edit button next to any listed address.	Update address detail.
, Company - Update Phone, Person - Update Phone, Partner Company - Update Phone, Site - Update Phone	RD_PHONE_DETAIL	Expand the Advanced Options section on the Address Book page for a company, person, partner company, or site. Select the Phone tab and click the Edit button next to any listed .	Update phone detail.
, Company - Update Email, Person - Update Email, Partner Company - Update Email, Site - Update Email	RD_EMAIL_DETAIL	Access the Address Book page for a company, person, partner company, or site. Expand the Advanced Options section. Select the Email tab. Click the Edit button next to any listed email address.	Update email detail.

Maintaining Address Books

Access the Address Book page for a company, site, partner company, or person.



Person (Business Contact) - Address Book page

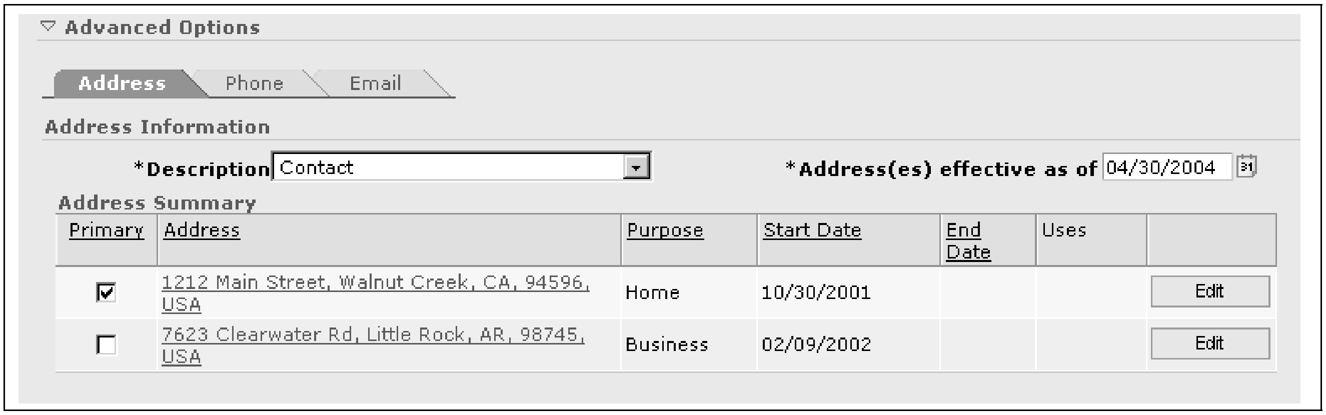
Description Click a description to edit the contact information that is in the entry.

Create Entry Click to add a new contact information entry.

See Chapter 3, “Defining Control Values for Business Objects,” Configuring Address Books, page 28.

Advanced Options

Use the advanced options section to designate a contact method as primary for the business object and to edit information about the contact method.

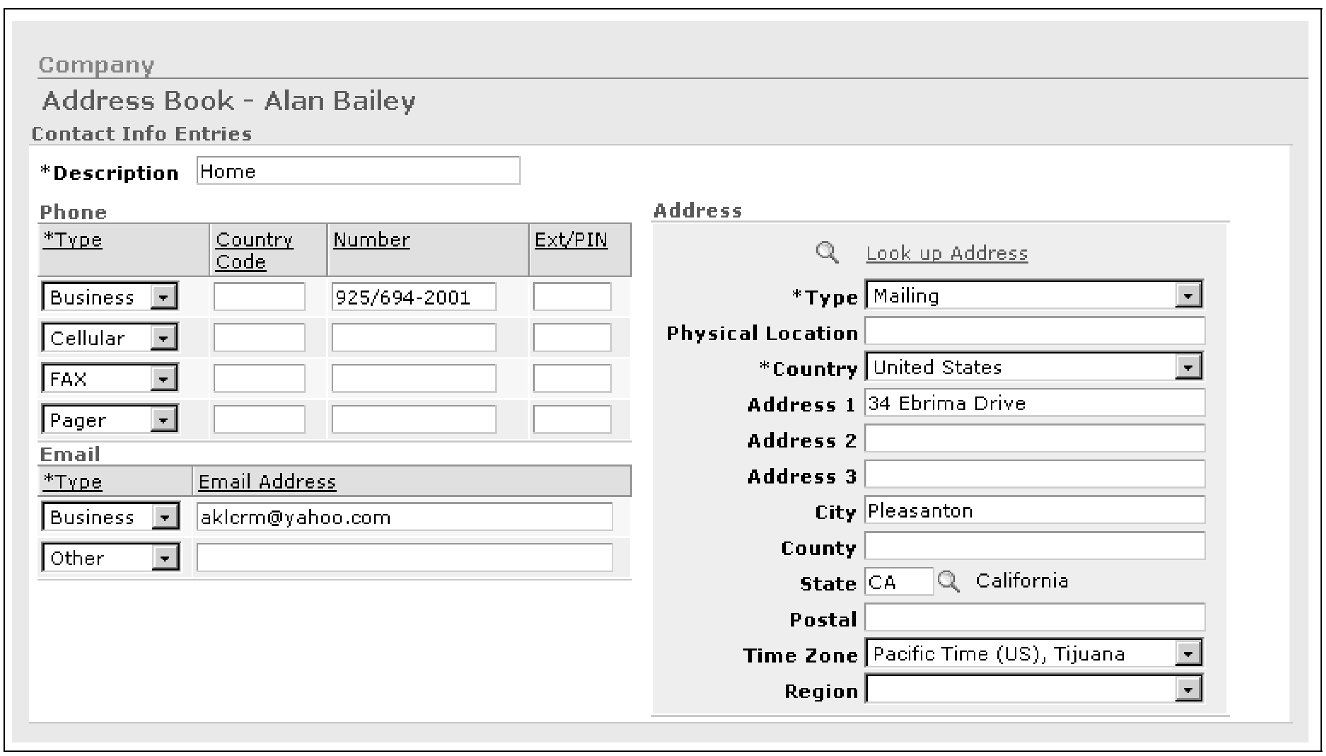


Address Book page - Advanced Options section

Edit Click this button to access a page where you can edit the contact method and change its start and end dates.

Maintaining Contact Information

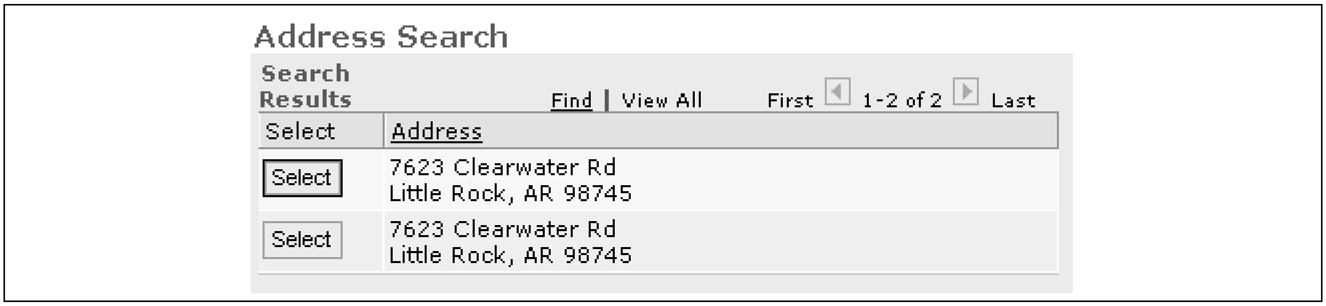
Access the Contact Info page for a company, person, partner company, or site.



Contact Info page

Selecting Existing Addresses

Access the Address Search page for a company, person, partner company, or site.

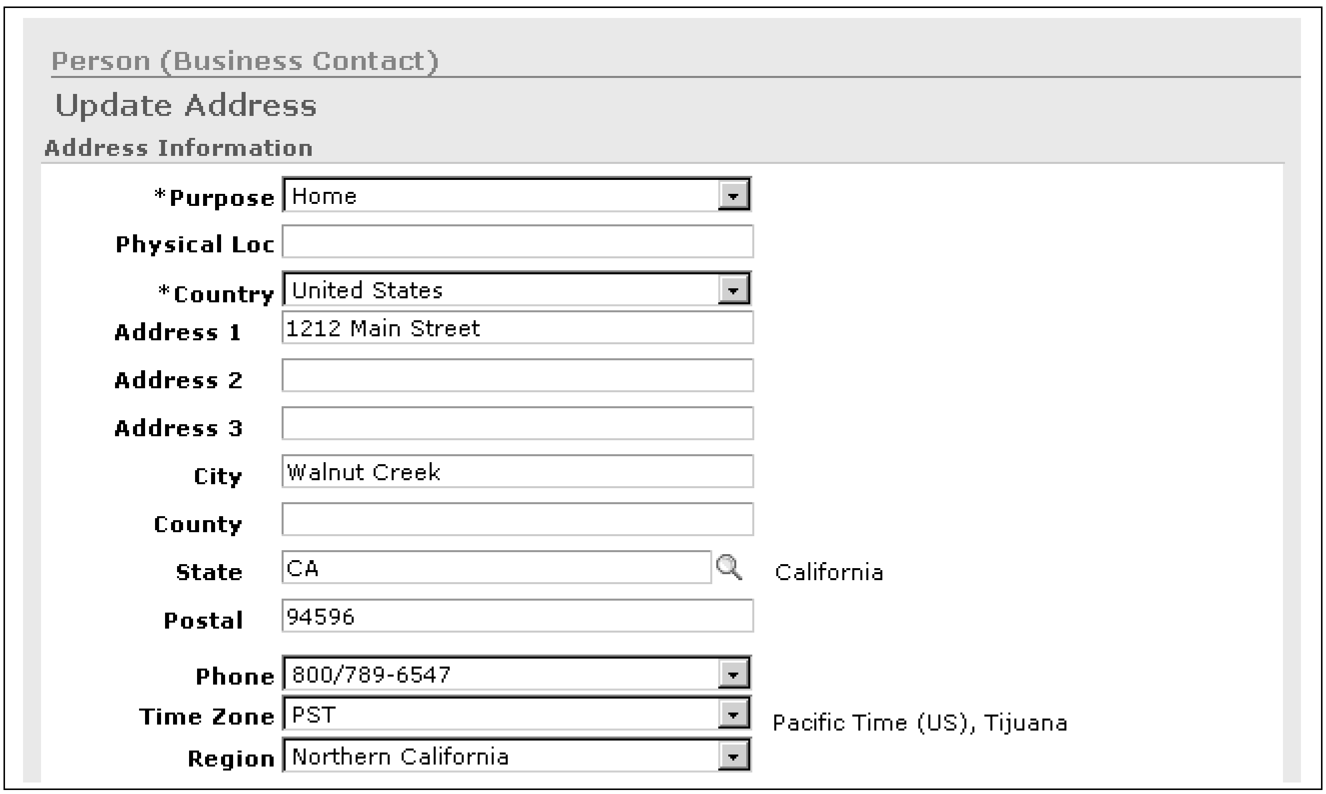


Address Search page

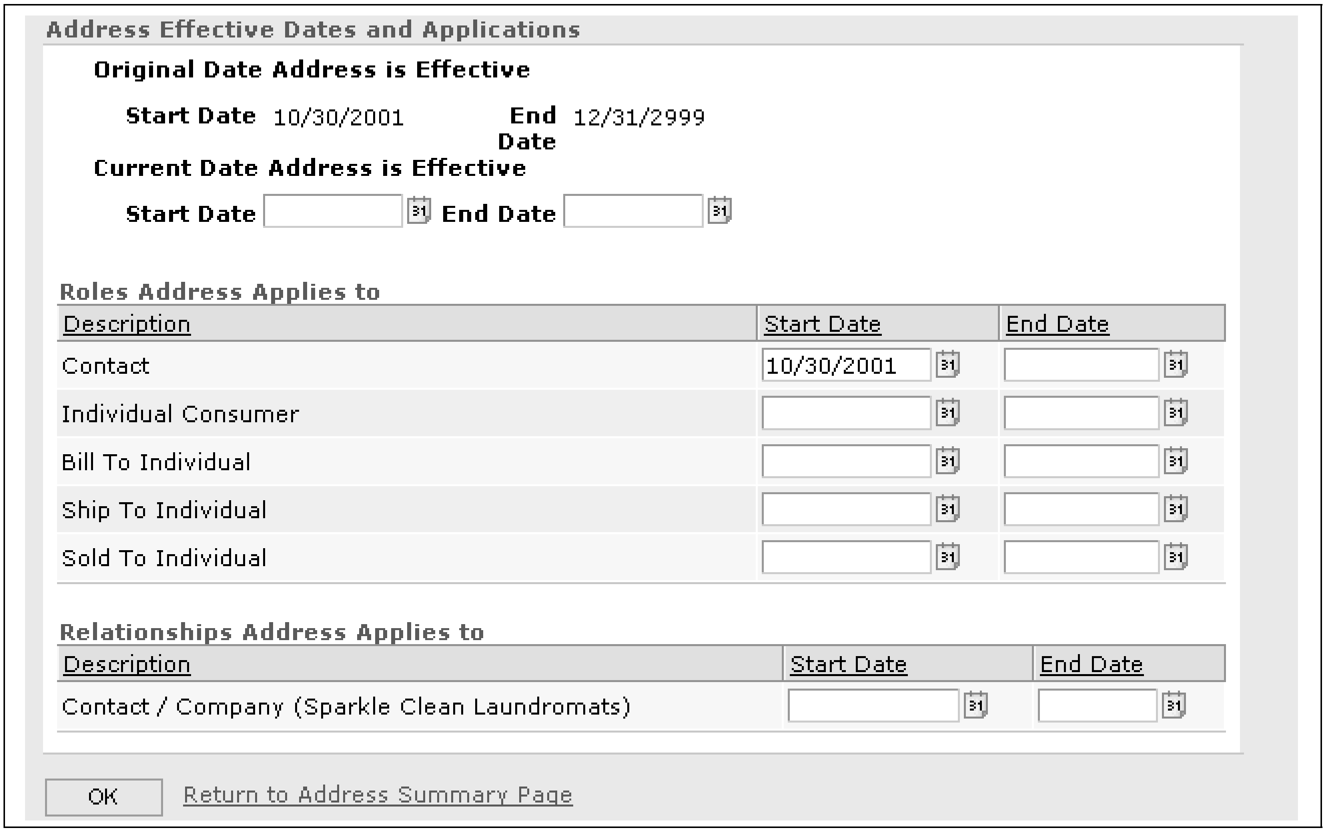
Select a listed address.

Updating Address Detail

Access the Update Address page for a company, person, partner company, or site.



Update Address page (1 of 2)



Update Address page (2 of 2)

Search for Existing Address Click to search the existing addresses for a company. The system returns addresses that match the address information that you enter in the Address Information page region.

Create Using Entered Address Click to create the address by using the information that you enter.

Address Effective Dates and Applications

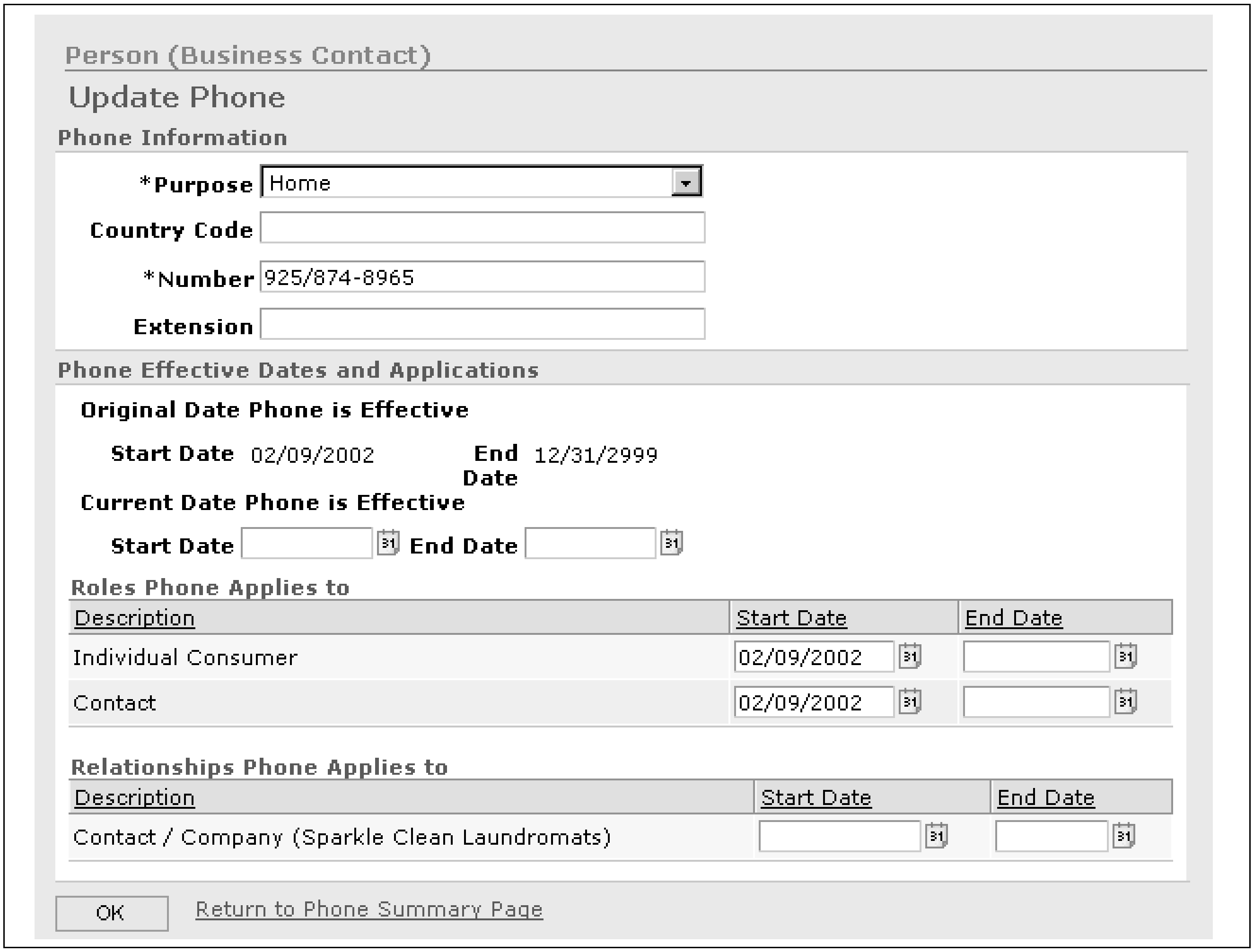
Enter the start date and end date that the address is effective.

Roles Address Applies to

This region lists all the roles that are assigned to the business object. By default, the address applies to all the business object roles. You can enter a start date and end date for each role to inactivate the address defined for the role.

Updating Phone Detail

Access the Update Phone page for a company, person, partner company, or site.



Update Phone page

Phone Effective Dates and Applications

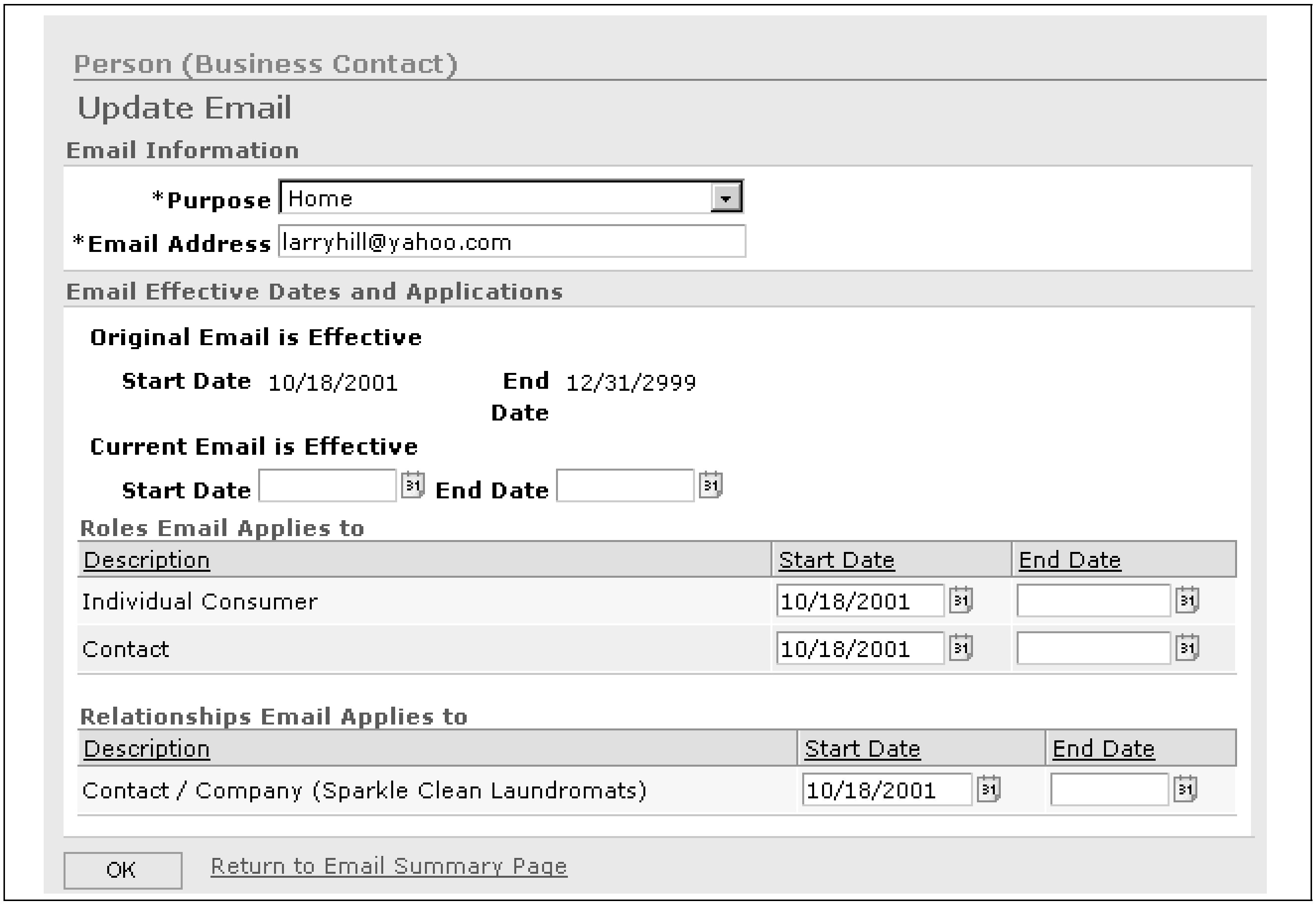
Enter the start date and end date that the phone number is effective.

Roles Phone Applies to

This region lists all the roles that are assigned to the business object. By default, the phone number applies to all the business object roles. You can enter a start date and end date for each role to inactivate the phone for the role.

Updating Email Detail

Access the Update Email page for a company, person, partner company, or site.



Update Email page

Email Effective Dates and Applications

Enter the start date and end date that the email is effective.

Roles Email Applies to

This region lists all the roles that are assigned to the business object. By default, the email applies to all the business object roles. You can enter a start date and end date for each role to inactivate the email for the role.

See Also

Chapter 3, “Defining Control Values for Business Objects,” Setting Up Contact Methods, page 29

Defining Customer Contacts

This section discusses how to define contacts for a customer or partner company.

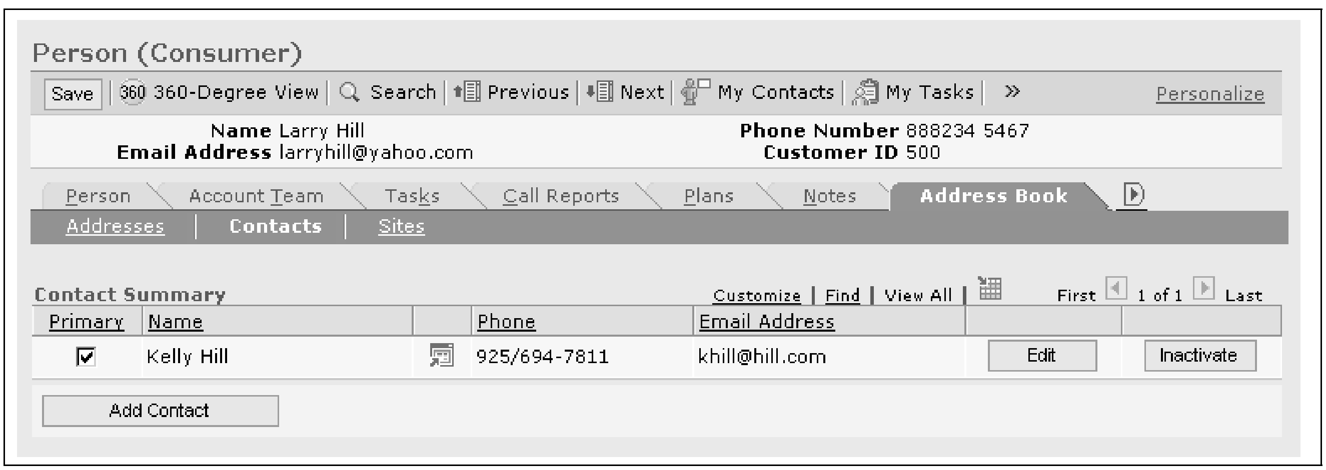
Pages Used to Define Customer Contacts

Page Name	Object Name	Navigation	Usage
Person - Contacts	RD_CONSUMER_REP	• Customers CRM, Search Person, Person, Summary Click the Edit Consumer Information link or the Add Consumer Information link. Select the Address Book tab and click the Contacts link. • Customers CRM, Add Person, Person, Details Click the Add Consumer Information link. Select the Address Book tab and click the Contacts link.	Maintain the list of contacts for a person. **Note.** You can only define contacts for a person with the consumer role.
Company - Contacts	RD_COMPANY_CNTCT_2	• Customers CRM, Add Company, Company, Details Select the Address Book tab. Click the Contacts link. • Customers CRM, Search Company, Company, Summary Select the Address Book tab. Click the Contacts link.	Maintain the list of contacts that are defined for a company.
Partner Company - Contacts	RD_PTNR_CONTACTS	• Partners, Add Partner Company, Partner Company, Details Select the Address Book tab. Click the Contacts link. • Partners, Search Partner Company, Partner Company, Summary Select the Address Book tab. Click the Contacts link.	Maintain the list of contacts for a partner company.

Page Name	Object Name	Navigation	Usage
Site - Contacts	RD_SITE_CNTCT_2	• Customers CRM, Add Site, Site, Primary Select the Address Book tab. Click the Contacts link. • Customers CRM, Search Site, Site, Primary Select the Address Book tab. Click the Contacts link.	Maintain the list of contacts for a site.
Add Contact	RD_REP_ADD_SRCH	Click theAdd Contact button on the Contacts page for a company, consumer, partner company, or site.	Add a contact of a company, consumer, partner company, or site.
Maintain Contact	RD_REP_MAINTAIN	Click theMaintain Contact button on the Contacts page for a company, consumer, partner company, or site.	Maintain purchasing options and contact information entries for a contact of a company, consumer, partner company, or site.

Maintaining the Contact List

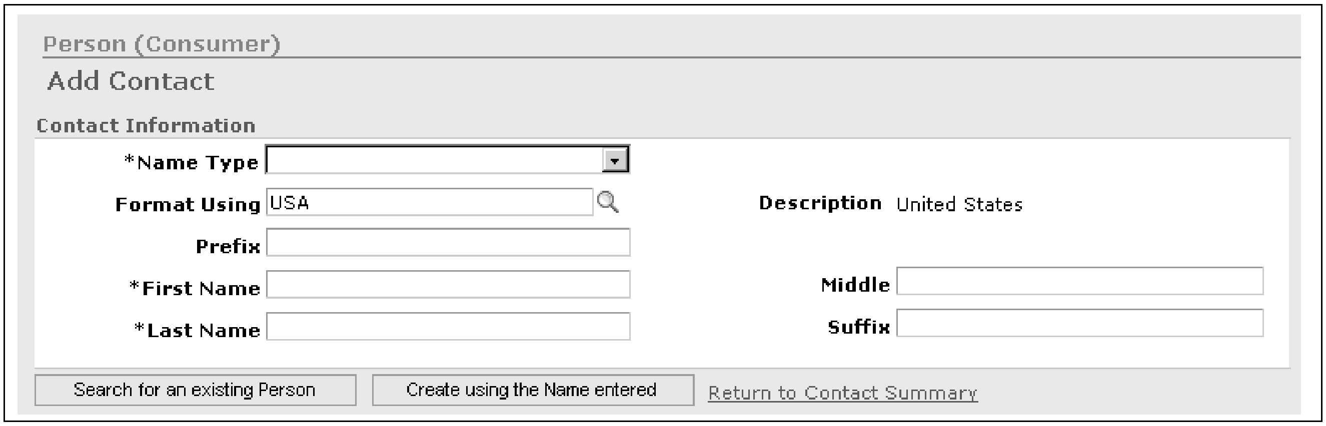
Access the Contacts page for a company, partner company, site, or person with the consumer role.



Contacts page

Adding Contacts

Access the Add Contact page.

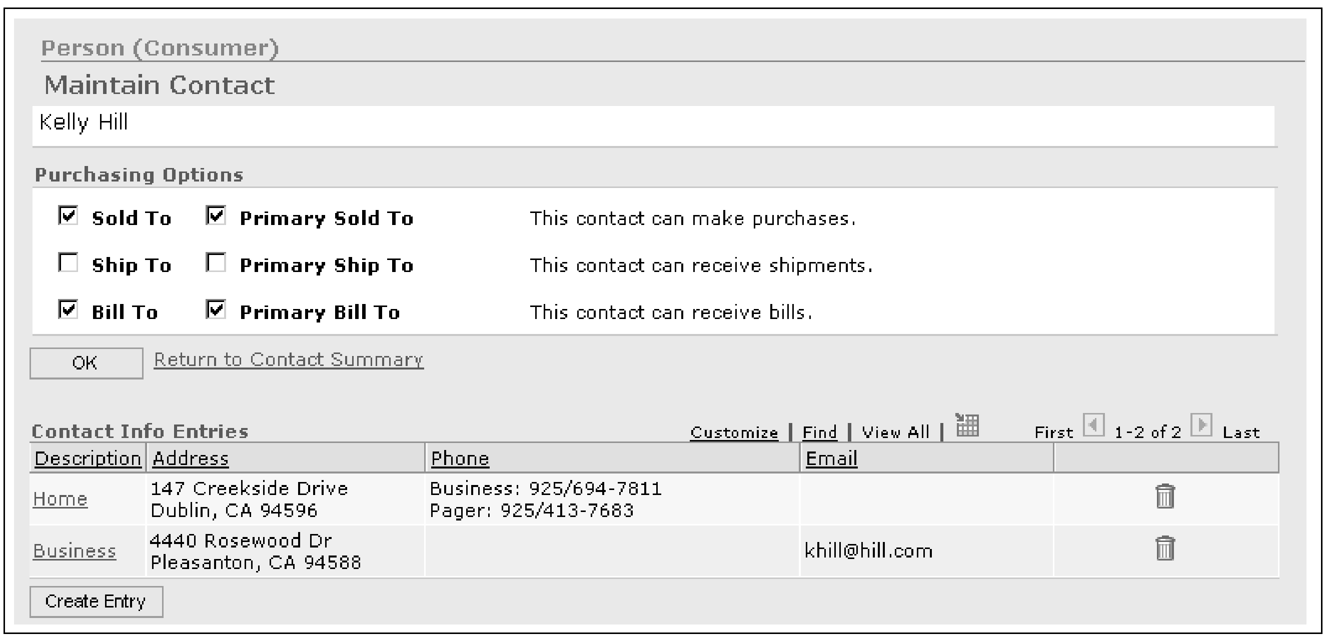


Add Contact page

Search for an existing Person Click to search the database for a person whose information matches what you enter on this page. A page appears on which you can choose a person to add as a contact.

Editing Contact Information

Access the Maintain Contact page.



Maintain Contact page

Purchasing Options

Purchasing options appear here only if you enable the option on the component's primary page. The contact must have at least one address defined before you can select purchasing options.

Defining Customer Sites

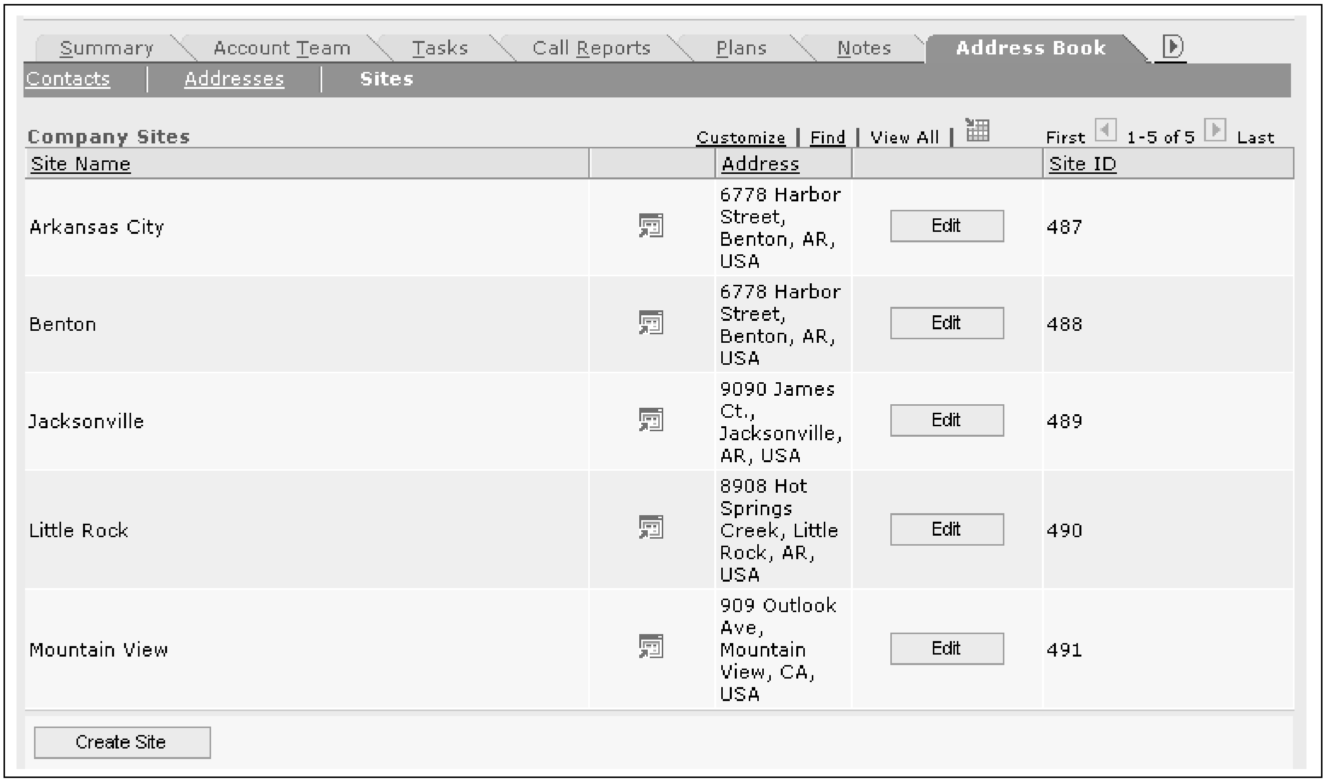
This section lists the pages used to maintain site lists.

Pages Used to Define Sites

Page Name	Object Name	Navigation	Usage
Company - Sites	RD_COMPANY_SITE_2	• Customers CRM, Add Company, Company, Address Book Click the Sites link. • Customers CRM, Search Company, Company, Address Book Click the Sites link.	Maintain company sites.
Person - Sites	RD_CONSUMER_SITE_2	• Customers CRM, Add Person, Person, Details Click the Add Consumer Information link. Select the Address Book tab and click the Sites link. • Customers CRM, Search Person, Person, Summary Click the Edit Consumer Information link or the Add Consumer Information link. Select the Address Book tab and click the Sites link.	Maintain sites for a person. **Note.** You can only maintain sites for a person with the consumer role.
Company - Edit Site, Person - Edit Site	RD_CUST_SITE_DTL	Click the Edit button next to a listed site on the Sites page for a company or person who has the consumer role.	Maintain contact information entries for a customer site.
Company - Create Site, Person - Create Site	RD_CUST_SITE_DTL	Click the Create Site button on the Sites page for a company or person who has the consumer role.	Add a site to a company or person.

Maintaining Site Lists

Access the Company - Sites page



Company Sites

CHAPTER 5

Defining Purchasing Options for Companies, Consumers, and Sites

This chapter provides an overview of purchasing options for customers and discusses how to:

- Define purchasing options for customers.
- Select purchasing options for customer addresses, sites, and contacts.

Understanding Purchasing Options

If you have installed PeopleSoft Order Capture, you can designate purchasing options for customers: companies, consumers, or sites. Purchasing options in PeopleSoft Enterprise CRM control whether a customer can make purchases (sold-to), receive shipments (ship-to), or receive invoices (bill-to).

Defining purchasing options is a two-step process. First, you enable purchasing options at the component level for Company, Site, or Consumer customer components. You then select the purchasing options that apply to each address and contact that you have defined for the company, consumer, or site.

If a company, consumer, or site is defined as a sold to customer, you can define related customers to receive the bills or shipments. This handles situations that commonly occur in business where a company's purchasing and payment processing are done centrally but the ordered products are typically shipped to other corporate sites.

Location of Purchasing Options

This table shows where you can enable and update the purchasing options for different types of customers:

Information Type	Enable Purchasing Options	Update Purchasing Options Detail
Company component	Details page	Purchasing Info page
Site component	Details page	Purchasing Info page
Person component **Note.** Purchasing options are available only for a person with the consumer role.	Details page	Purchasing Info page.

This table shows where you select purchasing options that apply to contacts, sites, and addresses of customers:

Information Type	Select Purchasing Options
Customer contact	Maintain Contact page Add Contact page
Customer site	Maintain Site page Add Site page
Customer address	Contact Info page

These pages are available as from a customer's Address Book page when you add or edit contacts, sites, or addresses.

See Chapter 4, "Defining Name and Address Information for Business Objects," Maintaining Address Books for Business Objects, page 51; Chapter 4, "Defining Name and Address Information for Business Objects," Defining Customer Contacts , page 57 and Chapter 4, "Defining Name and Address Information for Business Objects," Defining Customer Sites, page 61.

Purchasing Option Integrations

Other systems, including PeopleSoft Financial Management Solutions (PeopleSoft FMS), PeopleSoft Supply Chain Management (PeopleSoft SCM), and third-party systems, capture and use purchasing information. You can use EIPs (enterprise integration points) to synchronize purchasing option information with these systems.

Sites that are flagged as bill-to or sold-to in PeopleSoft Enterprise CRM are integrated in PeopleSoft SCM as customers. PeopleSoft Enterprise CRM ship-to sites are integrated to PeopleSoft SCM as addresses of sites with which the site is currently associated.

PeopleSoft FMS or PeopleSoft SCM also enable you to define additional attributes and processing options and view the updated information in PeopleSoft Enterprise CRM.

See Also

Chapter 8, "Defining Company Business Objects ," page 107

Chapter 9, "Defining Site Business Objects ," page 117

Chapter 10, "Defining Person Business Objects," page 127

Chapter 11, "Defining Workers," page 143

Chapter 16, "Managing Enterprise Integration for PeopleSoft Enterprise CRM ," page 269

PeopleSoft Application Fundamentals for Financials, Enterprise Service Automation, and Supply Chain Management PeopleBook

Defining Purchasing Options for Customers

This section discusses how to define purchasing options.

Pages Used to Define Purchasing Options for Customers

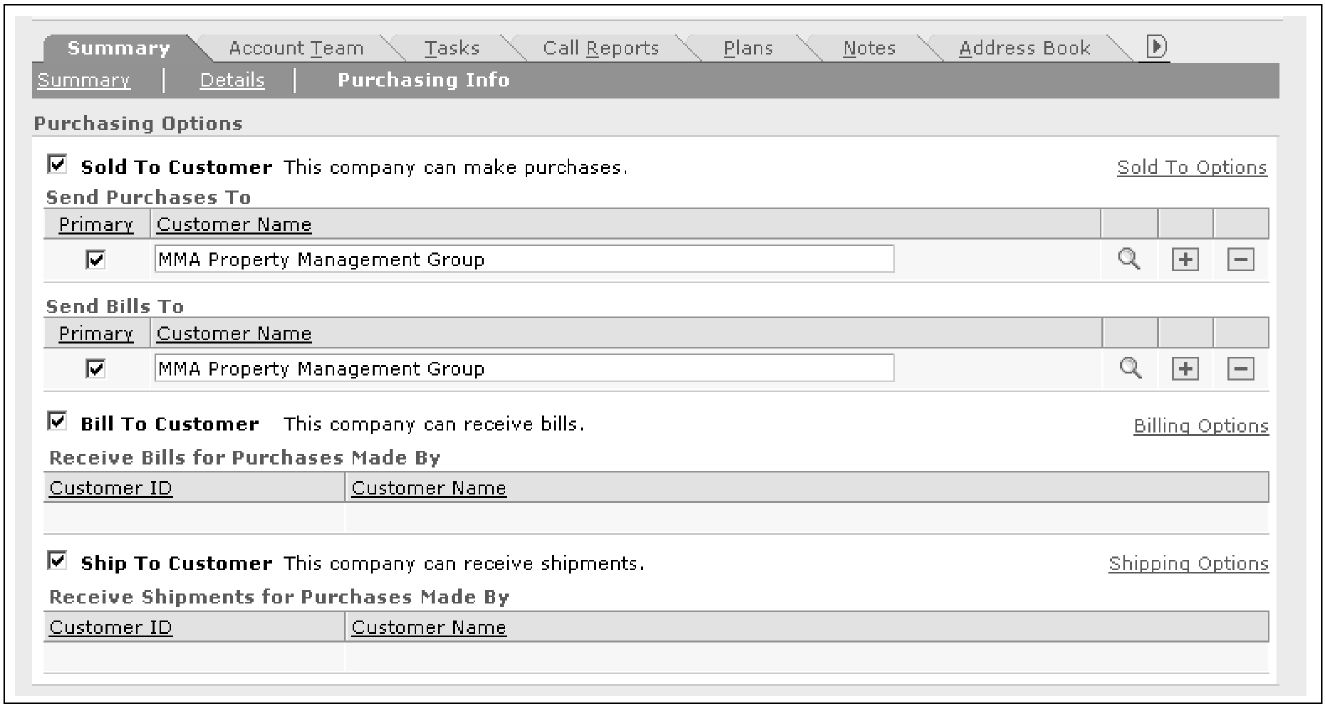
Page Name	Object Name	Navigation	Usage
Company - Details	RD_COMPANY_DETAILS	• Customers CRM, Search Company, Company, Summary Click the Details link. • Customers CRM, Add Company, Company, Details	Select purchasing options for the company.
Company - Purchasing	RD_COMPANY_CUST_OP	• Customers CRM, Search Company, Company, Summary Click the Purchasing Info link. • Customers CRM, Add Company, Company, Details Click the Purchasing Info link.	Enter purchasing option detail for the company.
Site - Details	RD_SITE_MAIN_2	• Customers CRM, Search Site, Site, Summary Click the Details link. • Customers CRM, Add Site, Site, Details	Select purchasing options for the site.
Site - Purchasing	RD_SITE_CUST_OP_2	• Customers CRM, Search Site, Site, Summary Click the Purchasing Info link. • Customers CRM, Add Site, Site, Details Click the Purchasing Info Link	Enter purchasing option detail for the site.
Person - Details	RD_CONSUMER_BC_OPT	• Customers CRM, Search Person, Add Person, Primary Click the Add Consumer Information link. • Customers CRM, Search Person, Person, Primary If the information that appears is for the Contact role, click the Edit Consumer Information or Add Consumer Information link. Click the Details link.	Enable purchasing options for the selected consumer. **Note.** Purchasing options for Persons are available only for a person with the Consumer role.

Page Name	Object Name	Navigation	Usage
Person - Purchasing	RD_CONSUMER_BC_OPT	Click the Purchasing Info link on the Person - Primary page for a person with the Consumer role.	Enable purchasing options for the selected consumer. **Note.** Purchasing options for Persons are available only for a person with the Consumer role.

Entering Purchasing Detail

Access the Purchasing Info page.

Note. The example shown is from the Company component. The Purchasing Info pages for the Consumer and Site components offer similar functionality.



Company - Purchasing Info page

Sold To Customer
Indicates that the customer or customer site can purchase products or services. If you select this option, you can designate other customers or customer sites to receive invoices and shipments for the purchases that this customer makes.

Bill To Customer
Indicates that the customer or customer site can receive invoices for purchases. If you select this option, you can designate other customers or customer sites for which the customer receives invoices.

Ship To Customer
Indicates that the customer or customer site can receive shipments for products or services. If you select this option, you can designate other customers or customer sites as purchasers of the products or services that this site receives.

Sold-To Options

Click the Sold-To options link.

Purchasing Info: Sold - To Options page view

Shipping Options

Access the Purchasing Options page. Click the Shipping Options link.

This view displays ship to options that are established in PeopleSoft Financial Management Solutions or PeopleSoft Supply Chain Management.

Billing Options

Access the Purchasing Options page. Click the Billing Options link.

This view displays bill to options that are established in PeopleSoft Financial Management Solutions or PeopleSoft Supply Chain Management. You can enter values for the following fields in PeopleSoft Enterprise CRM:

Credit Analyst

Select the code for the credit analyst who works with the customer. This field is required for successful integration with PeopleSoft Financial Management Solutions or Supply Chain Management.

See Chapter 16, “Managing Enterprise Integration for PeopleSoft Enterprise CRM ,” Creating and Maintaining Credit Analyst Codes, page 289.

Collector

Select the code for the collector who works with the customer. This field is required for successful integration with PeopleSoft Financial Management Solutions or Supply Chain Management. Collector codes are established on the Collector page under Set Up CRM, Common Definitions, Customer. Default EIP collector code values are specified on the Interface Defaults page under Set Up CRM, Common Definitions, Integration Rules, Integration Defaults.

Note. You must manually synchronize credit analyst and collector codes between PeopleSoft Enterprise CRM and PeopleSoft Financial Management Solutions and PeopleSoft Supply Chain Management to ensure successful integration with these systems. Customer EIP application messages that include codes that are not available in the subscribing system will fail.

Payment Terms Code

Enter the payment terms for informational purposes.

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

Important! Perform updates to the customer’s bill to options, including changes to the credit analyst or collector codes, in the PeopleSoft Financial Management Solutions or PeopleSoft Supply Chain Management system.

View Sold-To Options View

Click the View Sold-To Options link.

This view displays sold to options that are established in PeopleSoft Financial Management Solutions or PeopleSoft Supply Chain Management.

Selecting Purchasing Options for Customer Addresses

This section discusses how to define purchasing options for addresses.

Pages Used to Select Purchasing Options for Customer Addresses

Page Name	Object Name	Navigation	Usage
Contact Info	ABE_DETAIL	• Customers CRM, Search Company, Company, Address Book Click the Addresses link. Click a Description link. • Customers CRM, Search Site, Site, Address Book Click the Addresses link. Click a Description link. • Customers CRM, Search Person, Person, Summary Click the Add Consumer Information link. Select the Address Book tab. Click the Addresses link. Click a Description link.	Select purchasing options that apply to an address of a company, site, or person. **Note.** Purchasing options are available from the Person component only if the person has the Consumer role.

Selecting Purchasing Options for Addresses

Access the Contact Info page for a company, site, or consumer.

See Chapter 4, “Defining Name and Address Information for Business Objects,” Maintaining Address Books for Business Objects, page 51.

Selecting Purchasing Options for Customer Contacts

This section discusses how to define purchasing options for customer contacts.

Pages Used to Select Purchasing Options for Customer Contacts

Page Name	Object Name	Navigation	Usage
Person - Contacts	RD_CONSUMER_REP	• Select the Address Book tab on the Person component for a person who has the Consumer role. Click the Contacts link. • Customers CRM, Add Person, Person, Primary Click the Add Consumer Information link. Select the Address Book tab. Click the Contacts link.	Maintain the list of contacts for a person. **Note.** You can only define contacts for a person with the Consumer role.
Company - Contacts	RD_COMPANY_CNTCT_2	• Customers CRM, Add Company, Company, Address Book Click the Contacts link. • Customers CRM, Search Company, Company, Address Book Click the Contacts link.	Maintain the list of contacts for a company.
Site - Contacts	RD_SITE_CNTCT_2	• Customers CRM, Add Site, Site, Address Book Click the Contacts link. • Customers CRM, Search Site, Site, Address Book Click the Contacts link.	Maintain the list of contacts for a site.
Contact Info	ABE_DETAIL	Click the Add Contact button next to a listed contact on the Contacts page for a company, site, or person with the consumer role.	Select purchasing options that apply to an address of a company, site, or person.
Maintain Contact	RD_REP_MAINTAIN	Click the Edit Contact button next to a listed contact on the Contacts page for a company, site, or person with the consumer role.	Maintain purchasing options for a contact. Designate a contact as primary for a purchasing option.

Selecting Purchasing Options for Customer Contacts

Access the Contact Info page for a contact of a customer.

See Chapter 4, "Defining Name and Address Information for Business Objects," Maintaining Address Books for Business Objects, page 51.

Maintaining Purchasing Options for Customer Contacts

Access the Maintain Contact page for a contact of a customer.

See Chapter 4, "Defining Name and Address Information for Business Objects," Defining Customer Contacts , page 57.

Selecting Purchasing Options for Customer Sites

This section discusses how to define purchasing options for customer sites.

See Also

Chapter 4, "Defining Name and Address Information for Business Objects," Defining Customer Sites, page 61

Page Used to Select Purchasing Options for Customer Sites

Page Name	Object Name	Navigation	Usage
Company - Sites	RD_COMPANY_SITE_2	• Customers CRM, Add Company, Address Book Click the Sites link. • Customers CRM, Search Company, Address Book Click the Sites link.	Maintain company sites.
Person - Sites	RD_CONSUMER_SITE_2	• Customers CRM, Add Person, Details Click the Add Consumer Information link. Select the Address Book tab and click the Sites . • Customers CRM, Search Person, Summary Click the Edit Consumer Information link or the Add Consumer Information link. Select the Address Book tab and click the Sites .	Maintain sites for a person. **Note.** You can only maintain sites for a person with the consumer role.
Company - Edit Site, Person - Edit Site	RD_CUST_SITE_DTL	Click the Edit button next to any listed site on the Sites page for a company or consumer.	Select purchasing options for a customer site. **Note.** Purchasing options are available from the Person component only if the person has the Consumer role.
Company - Create Site, Person - Create Site	RD_CUST_SITE_DTL	Click the Create Site button on the Sites page for a company or person who has the consumer role.	Select purchasing options for a customer site.

Selecting Purchasing Options for Customer Sites

Access the Contact Info page for a site of a customer.

See Chapter 4, "Defining Name and Address Information for Business Objects," Defining Customer Sites, page 61.

CHAPTER 6

Working with Business Object Profiles

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

- Specify a profile prefix.
- Create a profile request.
- Register a profile.
- Set up profile groups.
- View and update profile data.

Understanding Profiles

A profile is a PeopleSoft Enterprise CRM business tool with multiple uses. Profiles reference data to and from the Customer Data Model (CDM), transactional tables, or user defined profile tables. Profiles are used to:

- Define target audiences for use in marketing activities.
- Create questions in PeopleSoft Online Marketing Web-based documents.
- Merge stored profile attribute values into PeopleSoft Online Marketing email or Web-based documents.
- Bring data from external sources into the CDM using PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM) Data Import.
- Create CDM “attributes” that are viewable and editable in CDM components.
- Enable analysis of profile data using Marketing Insight (requires modification of ETL maps).

System and User-Defined Profile Data

PeopleSoft Enterprise CRM utilizes the Customer Data Model as a centralized data storage repository to retain extensive individual and organization information. To maximize system performance, PeopleSoft Marketing and Online Marketing utilize a subset of the CDM data that is stored in a set of three basic data tables. When additional individual or organization information not contained in the delivered data tables is needed, PeopleSoft Marketing enables you to define new profiles and profile fields that you need in the exact language that you want. A system administrator then uses PeopleSoft Application Designer to create the corresponding physical tables and fields, and then maps them to the requested definitions. Whether data resides in the predefined system tables or your user-defined profile tables, it can be utilized for all functions by using one or more profiles.

PeopleSoft delivers two profiles with the system, one for individuals and one for organizations. The two delivered profiles are listed with the profile name, People under the Type Individual and Companies under the Type Organization. The Individual: People and Organization: Company profiles cover profile needs related to basic contact data (for example, name, address, Company name, and so on). Additionally, each user-defined profile table has a corresponding profile to reference the data that is stored there. Use profiles in combination to access information in any or all tables.

Profile Usage

Consider an example of the various ways profiles are used.

Suppose that your company operates a national chain of pet supply stores and that you are part of the team charged with making your marketing efforts more effective. Your team believes that one way to accomplish this is by targeting current and potential customers with promotions specific to the pets they own, and you decide to test it with an online marketing campaign. As part of the campaign, you purchase a list of subscribers to various pet magazines. Using your Individual: People profile, import the subscriber list into your PeopleSoft Enterprise CRM database.

Using your Individual: People profile once again, create a target audience of customers who have an email address on record. Use PeopleSoft Online Marketing to create an Online Dialog and send that target audience an email broadcast offer. The email directs respondents to a PeopleSoft Online Marketing Web page that offers a free gift for each pet in the household. To receive the gift, respondents must enter or update information about each pet.

A few months ago, your company started gathering data on customers' pets. At that time, a user-defined profile was created to store several pieces of information. The Web page that you have directed respondents to was created in PeopleSoft Online Marketing using your Individual: People and Pets profiles. As you created the page, you used several of the profile fields to display questions. As respondents answer the questions, the respondent's profile data is updated in your PeopleSoft Enterprise CRM database in real time.

Once the information gathering phase of the dialog is complete, you launch another follow-up email targeted to the respondents. This time, you use the Individual People and Pets profiles to tailor email messages and promotions. While viewing the types of information that are gathered by the Individual People and Pets profile, you see that you can differentiate your customers by the kind of pet they own. Using the Pet Type as a search criteria, you create separate emailing lists: Cat, Dog, Rodent, Horse, and Bird. When the results are in, you find that this personalized, targeted approach is far more effective than other marketing efforts and you decide to expand it to your entire customer base.

See Also

PeopleSoft 8.9 Online Marketing User's Guide

PeopleSoft 8.9 Marketing PeopleBook

PeopleSoft 8.9 CRM Warehouse PeopleBook

Chapter 17, "Importing Data Into PeopleSoft Enterprise CRM," page 299

Profile Data in the CDM

PeopleSoft Enterprise CRM Online Marketing enables marketers to define profiles and profile fields that collect customer profile information, such as color or brand preference, online. Once the marketers register and activate profiles and profile fields, you can configure profile groups that enable CDM components to access profile data. You can also set up the configurable search to use profile fields as search criteria.

To configure profile data for displaying and updating in CDM components, define a profile group that includes the profile fields and attach the profile group to CDM components. You can also use the Active Analytics Framework (OAF) to define conditions under which the profile data appears.

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

The More Info page of the Company, Partner Company, and Person components enables you to view and update profile information. Read-only profile data appears on the Summary page of the Company and Partner Company components.

Note. You can specify that the profile group data appears as read-only on the More Info page.

See Also

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

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

Common Elements Used in this Chapter

This section lists common elements and discusses profile data in the customer data model (CDM).

Profile Field A specific bit of information that is captured about the customer. For example, contact lens customers of an optical supply seller might have profile fields for the preferred color, preferred type (extended wear or daily wear), brand preference, optometrist, prescription, date of last purchase, and care kit provided. Profile fields are keyed by BO_ID.

Profile Group An arbitrary collection of profile fields for display purposes. For example, the optical supply seller might have a profile group for contact lens information, eyeglass information, and sunglass information.

Condition Information that controls when the profile group is displayed. After you set up profile groups, you can define the conditions for displaying and updating a profile group in a component. A read-only profile summary appears on the primary page for every component that meets the conditions, and a profile information page for updating profiles is added to the component.

For example, the condition for displaying the Contact Lens Info profile group in the Consumer component is that the consumer either previously purchased contact lenses or has requested contact lens information.

Specifying a Profile Prefix

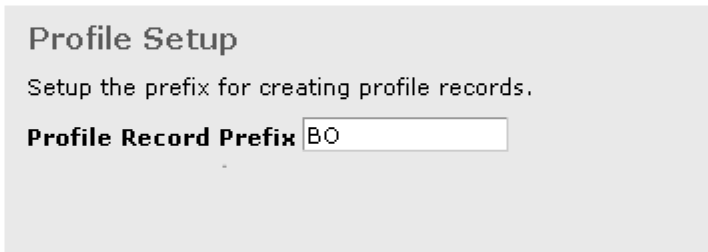
This section discusses how to specify a profile prefix.

Page Used to Specify a Profile Prefix

Page Name	Object Name	Navigation	Usage
Profile Setup	RA_PROFILE_SETUP	Set Up CRM, Common Definitions, Profile Management, Profile Setup	Use to designate a record prefix value for manually-mapped user-defined profile records (tables).

Specifying a Profile Record Prefix

Access the Profile Setup page.



Profile Setup page

Designate a profile record prefix to use with user defined profile records (tables). The prefix must follow the standard PeopleSoft record prefix standards. Only tables with the profile record prefix are available on the Profile Registration page.

Creating a Profile Request

This section discusses how to:

- Define basic profile information.
- Add and edit profile fields.
- Define field detail.
- Modify active profiles.

Understanding Profile Requests

A profile request consists of instructions that you or a system administrator use to create a new database table and fields. Your request conveys the type of information that you need and how it is to be used. The profile is not available for use until it is registered and activated. To assist with the communication process of marketer's requests and fulfillment or rejection of those requests by the system administrator, workflow is delivered. Marketing analysts can request profiles, and when they are set to a status of *Requested,* the person in the defined role of Dialog Administrator receives a worklist notification. When the request is either completed and activated, or rejected, the marketing administrator receives a worklist notification.

Creation of profiles should always follow thoughtful design of campaign objectives and strategy. Before beginning to define a profile request, determine who you want to contact (your target audience), what information you want to display, what new information you want to collect, and what existing information you want to update. Profile creation requires a through knowledge of your PeopleSoft Enterprise CRM database (to ensure you are not creating a duplicate profile or profile field) and involves a collaboration between the marketer and the system administrator.

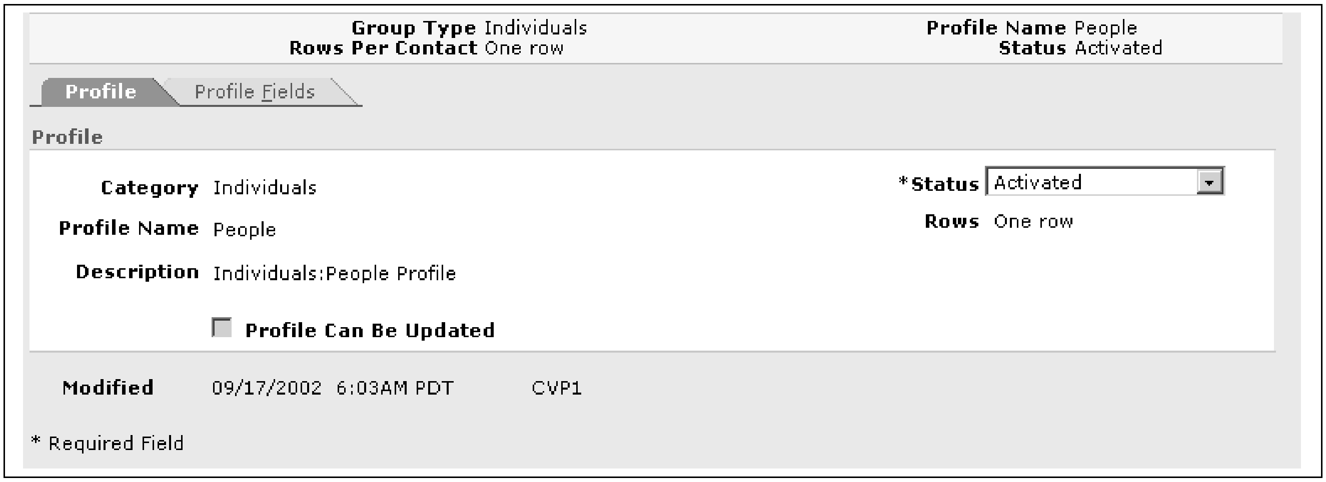
Note. If you have purchased PeopleSoft Online Marketing, the following characters cannot be used in profiles being used for Online Marketing documents: ampersand (&), apostrophe or single quote ('), double quote ("), greater than (>), less than (<), or period (.).

Pages Used to Create a Profile Request

Page Name	Object Name	Navigation	Usage
Profiles	RA_PROFILE_SUMM	Set Up CRM, Common Definitions, Profile Definition	Use to view summary information about all of your profiles and to access an existing profile or create a new profile.
Profile	RA_PROFILE_DTL	• Click the profile name on the Profile Management page to edit an existing profile. • Click the Add a New Profile button on the Profile Management page to define a new profile.	Use to define basic information about the profile.
Profile Fields - Field Summary	RA_ATTRIBUTE_SUMM	Click the Profile Fields tab.	Use to add new fields to a profile, or to view existing profile fields.
Profile Fields - Field Detail	RA_ATTRIBUTE_DTL	Click the Field Detail link on the Profile Fields page.	Use to define a new profile field or to edit an existing profile field.

Defining Profile Information

Access the Profiles page.



Profiles page

Group Type

Select *Individuals* when the profile information refers to persons.

Select *Organizations* when the profile information refers to organizational data. .

Category

Shows the category to which the profile belongs.

Status

Select *In Design* while you are defining your profile request.

Select *Requested* to lock the profile design. Setting the status to *Requested* notifies your administrator that the profile design is complete. The administrator can manage approval and connecting the profile to the database.

Select *Activated* to indicate that the profile fields have been mapped and the required profile tables has been created.

Select *Rejected* to indicate that the profile design has been rejected by your system administrator.

Select *Update* to edit an activated profile.

Note. As long as the status of a profile is *In Design*, your ability to edit and make changes is unlimited. A status of *Requested* or *Rejected* allows you to delete any profile field that is in a status of *In Design*. Once the profile status is set to *Activated*, your ability to change or edit the profile is limited. For example, once a profile is activated you cannot delete a field. Likewise, field choices cannot be deleted, but they can be inactivated .

Profile Name

Enter a name for the profile.

Note. If you have purchased PeopleSoft Online Marketing, the following characters cannot be used in profile names used for Online Marketing documents: ampersand (&), apostrophe or single quote ('), double quote ("), greater than (>), less than (<), or period (.).

Rows

Row selection determines how many unique rows of data can be entered into the profile table for each contact. Profiles can be defined as either one row or many rows. Once a profile is requested, you cannot change the row selection.

Select *Many Rows* to allow multiple rows of data per contact.

Select *One Row* to allow only one row of data per contact.

For example, suppose that you use a one row table to store information about whether or not your customer is a pet owner and how many pets your customer owns. If you want to store the names of the pets, you must allow for the possibility that your customer has more than one dog or cat. To record the names of multiple pets requires a Many Row table.

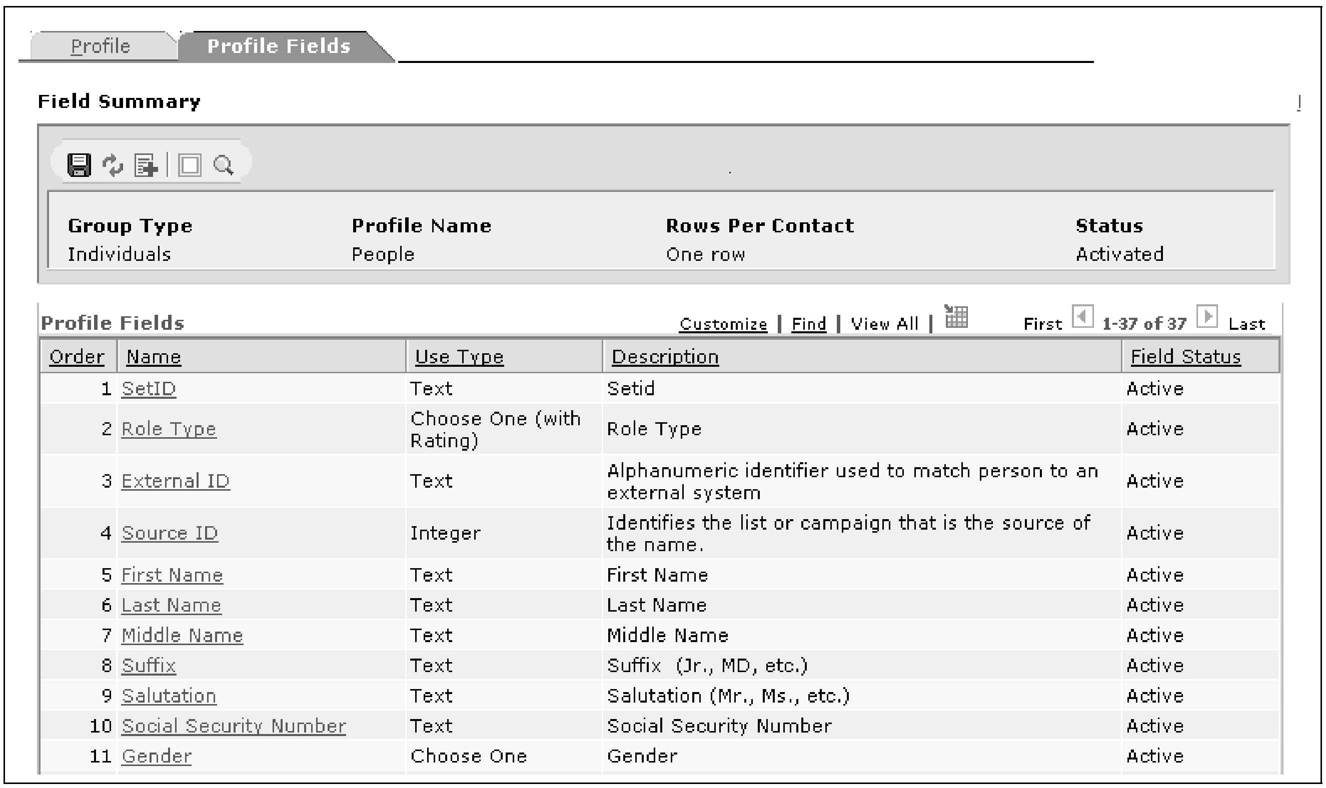
Note. Profiles defined as *Many Rows* can only be used for audience selection. It cannot be used in online documents by PeopleSoft Online Marketing.

Profile Can Be Updated

Select this check box if the profile is available for update (for example, by customers changing their information on an Online Marketing web page form). Profiles marked to not allow updates will not be allowed to have Profile Fields marked as questions.

Adding and Editing Profile Fields

Access the Profile Fields - Field Summary page.



Order	Name	Use Type	Description	Field Status
1	SetID	Text	Setid	Active
2	Role Type	Choose One (with Rating)	Role Type	Active
3	External ID	Text	Alphanumeric identifier used to match person to an external system	Active
4	Source ID	Integer	Identifies the list or campaign that is the source of the name.	Active
5	First Name	Text	First Name	Active
6	Last Name	Text	Last Name	Active
7	Middle Name	Text	Middle Name	Active
8	Suffix	Text	Suffix (Jr., MD, etc.)	Active
9	Salutation	Text	Salutation (Mr., Ms., etc.)	Active
10	Social Security Number	Text	Social Security Number	Active
11	Gender	Choose One	Gender	Active

Profile Fields - Field Summary page

Note. Click column headings to change the sort order of the column.

Order

Displays the order in which profile fields appear when the profile is used. The order affects the display only, and users are free to select the fields in any order desired.

Name

Click the field name to access the profile field detail.

Use Type

Defines how the new fields are to be used. Values are:

- *Choose Many:* Defines a choice field that allows the respondent to select more than one response from a list of options.
- *Choose One:* Defines a choice field that allows the respondent to select only one response from a list of options.
- *Choose One (with rating):* Defines a choice field that allows the respondent to select only one response from a list of options and assigns a numeric value to the choice. Also, specifies a numeric value associated with the choices. These values are to be used in the generated results.
- *Date:* Defines an entry field for a date.
- *Decimal:* Defines an entry field for numbers that allows decimal positions. An example is a currency entry.
- *Integer:* Defines an entry field for numbers that does not allow decimal positions. An example is a response to the question: How many children do you have?
- *Map to Existing Field:* Defines a choice field that relies on a prompt table for response options. Prompt tables are useful when the response options are numerous. For example, you can use a prompt table field for state and country responses. Some common prompt tables (such as state and country) already exist within the system. If a prompt table does not exist, your system administrator will have to build it.

Note. The *Map to Existing Field* field value is used for audience selection and data import only. PeopleSoft Online Marketing cannot use it in the creation of online documents. The *Map to Existing Field* field values cannot be included on profile tables with any other type of field. We recommend that they reference a view rather than a system or profile table.

- *Text:* Defines an entry field that allows the respondent to enter a free form text response. You must specify a field length. Maximum field length must be less than 254 characters.

Note. PeopleSoft Online Marketing users can use a document text field (created within a PeopleSoft Online Marketing document) to capture text entries greater than 254 characters. Refer to the PeopleSoft Online Marketing Users Guide for complete information.

- *Time:* Defines an entry field to receive a response in a time format.
- *Yes/No:* Defines a choice field where the responses are either yes or no.

Field Status

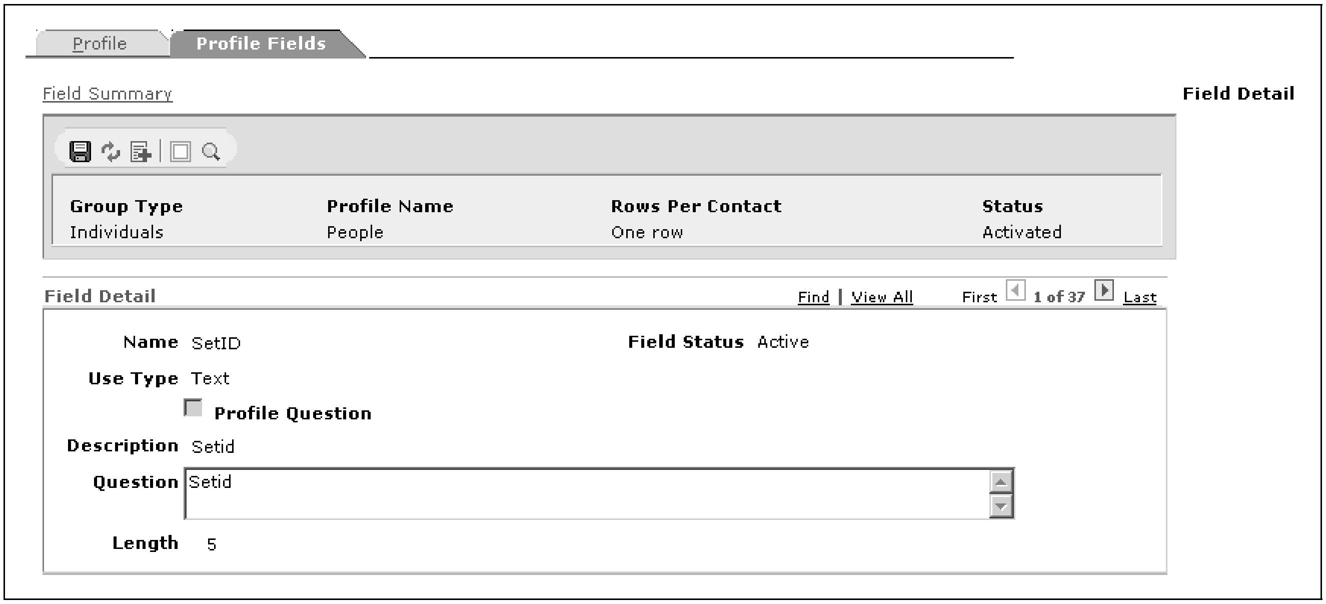
Displays the current status of the profile field and is always dependent on the status of the profile. Values are: *In Design, Active,* and *Update.*

Field Detail

Click to access the Profile Fields - Field Detail page where you defined the field.

Defining Field Detail

Access the Profile Fields - Field Detail page.



Profile Fields - Field Detail page

Name Enter a name for the field.

Field Status Displays the current status of the profile field and is always dependent on the status of the profile. Values are: *In Design*, *Active*, and *Update.*

You can alter the profile field value when the field status is *In Design* or *Update.* When a profile is activated, all profile field statuses change to *Active.* To alter a profile field value, change the status of the profile to *Update*, then change the profile field status to *Update.*

Use Type The use type value selected when you added the new field appears as the default value. Until the profile is activated, select a new option to change the field type.

Profile Question Select to make this field available for use in a Web document or email blast.

Description Enter a description of the field. The description appears on the Profile Fields - Field Summary page.

Question If the profile field is specified as a profile question (the Profile Question check box is selected), enter a question designed to elicit a desired response. For example, if the value for the profile field is *Number of Pets,* your question might be: “How many pets are in your household?”

The following fields appear only with certain use types.

Order Indicates the order in which you want the response options to appear. Change the order by changing the number in this field. Save the page to make the changes effective.

Choices Enter the choice values for the profile field question. The value entered appears where the profile is used.

Rating When *Choose One (with Rating)* is selected as the use type, enter a rating value for each option. Rating values are measured from the smallest numerical value to the highest. For example, a rating of 1 is less than a rating of 5.

Map to Field

When *Map to Existing Field* is selected as the use type, select the underlying prompt table.

Note. If the prompt table is unknown or does not exist, this field may be left blank. If the prompt table does not exist, a system administrator will have to build it before the profile is activated.

Length

When *Text* is selected as the use type, enter a text field length. Maximum field length must be less than 254 characters.

Modifying Active Profiles

You can make the following changes to activated profiles:

- Modify a profile field question.
- Change a profile field into a question field or change a question field into a non-question field.
- Add or inactivate field choices.
- Add a new profile field.

Note. Once a profile is inserted into a PeopleSoft Online Marketing document, changes to the profile do not affect the document unless the profile is deleted from the document and then reinserted.

It is not required that profile changes be applied to all documents. In fact, there are cases where you will not want to change a document. For example, you can insert a profile into two or more documents if you intend to offer different choices to a particular question. By modifying the choices on the profile, you can insert the version with the appropriate choices into the different documents.

With the exception of adding a new profile field, you can easily modify active profiles without having to resubmit your profile request.

Making Changes that Do Not Require a New Request

Changes to existing fields do not affect the underlying profile table. Rather, these changes affect what is called the metadata.

To make changes that do not require a new request (changes to the metadata):

1. Change the status of the profile to *Update*.
2. On the Profile Fields - Field Summary page, click the field that you want to modify.

   This enables you to access the Profile Fields - Field Detail page where you must change the Status field to *Update*.
3. Make the change.

   For example, to add a new choice to the *Choose Many* field value, click one of the Add buttons in the Choice column. To eliminate a choice, select the Inactivate check box beside the choice that you want to eliminate. You can also select or clear the Profile Question check box to change whether or not a field appears as a question, or change the text of a question.
4. Return to the Profile page, change the profile status to *Activated*, and save the profile.

Adding a New Profile Field

Adding a new profile field requires a change to the profile table and can be completed by you or by the administrator, depending on your organization's requirements.

To add a new profile field to an existing profile:

1. Change the status of the profile to *Update.*
2. On the Profile Fields - Field Summary page, select the use type for the field that you want to add and click the Add a New Field button.
3. Enter the field information and save the page.
4. Return to the Profile page, change the profile status to *Requested,* , and save the profile.

Registering a Profile

When a profile request is set to a status of *Requested* it becomes available for registration and activation. Registration is the process of mapping the profile fields to a to a profile table (record), then making the profile available for use. Registration is a simple matter of linking the profile to the profile table and activating the profile.

Note. *Map to Existing Field* field value types rely on an underlying prompt table for field values.

Choose Many field value types rely on a child table for field values.

If you have purchased PeopleSoft Online Marketing, the following characters cannot be used in profiles being used for Online Marketing documents: ampersand (&), apostrophe or single quote ('), double quote ("), greater than (>), less than (<), or period (.).

Critical Information for System Administrators

System administrators responsible for creating profile tables should be fully familiar with PeopleSoft Application Designer. To insure proper interaction between PeopleSoft Marketing and Online Marketing, you must follow specific record and view design parameters.

See *Enterprise PeopleTools 8.45 PeopleBook: Application Designer*

This table lists information that applies to profile table fields that are created using PeopleSoft Application Designer.

Profile Field Type	***PeopleTools Field Type***	***Notes***
Choose One	Char (254)	
Choose One with Rating	Number (18,0)	Must be signed.
Choose Many	N/A	Separate child table is needed. No new fields are required for the profile record.

Profile Field Type	**PeopleTools Field Type**	**Notes**
Text	Char (X)	X represents the desired field length as defined in the profile definition request .
Integer	Number (18,0)	Must be signed.
Decimal	Number (18,4)	Must be signed.
Date	Date	
Time	Time	
Yes/No	Char (1)	
Map to Existing Field	Char (x)	Map to Existing Field fields cannot be included in profile tables with any other type of field. We recommend that you create a view for this data rather than a profile table. The field referenced determines the PeopleTools field type. See the section related to building views in the PeopleSoft Application Designer documentation.

The following information applies to profile tables (records) created using PeopleSoft Application Designer:

- *One Row* profile records require the following fields: BO_ID (as a key and search key field) and all other fields as defined in the profile request (as nonkeys). At the end of the record, include the RB_AUDIT_SBR subrecord.
- *Many Rows* profile records require the following fields: BO_ID and RA_ATTRIB_SEQ (as key and search key fields), and all other fields as defined in the profile request (as nonkeys).

  At the end of the record, include the RB_AUDIT_SBR subrecord. Also, a new index must be created. When you create the index, add comments and make sure that the clustered and unique check boxes are cleared. Add the BO_ID field to the index.
- A record that includes a *Choose Many* use type, must also have a child record to contain the choices selected by the respondent.

  The child record requires the following fields: BO_ID and RA_ATTRIB_SEQ (as key fields), CHOICE (as a nonkey field), and the RB_AUDIT_SBR subrecord. These are the only fields you should have on your *Choose Many* child record. Also, a new index must be created. When you create the index, add comments and make sure that the clustered and unique check boxes are cleared. Add the BO_ID field to the index.

Profile records must follow a standard naming convention (<recprefix>_<profileName>), using the record prefix designated on the Profile Setup page. For example, if the record prefix is OMP_, and your profile record relates to pets, you might use the name OMP_PETS.

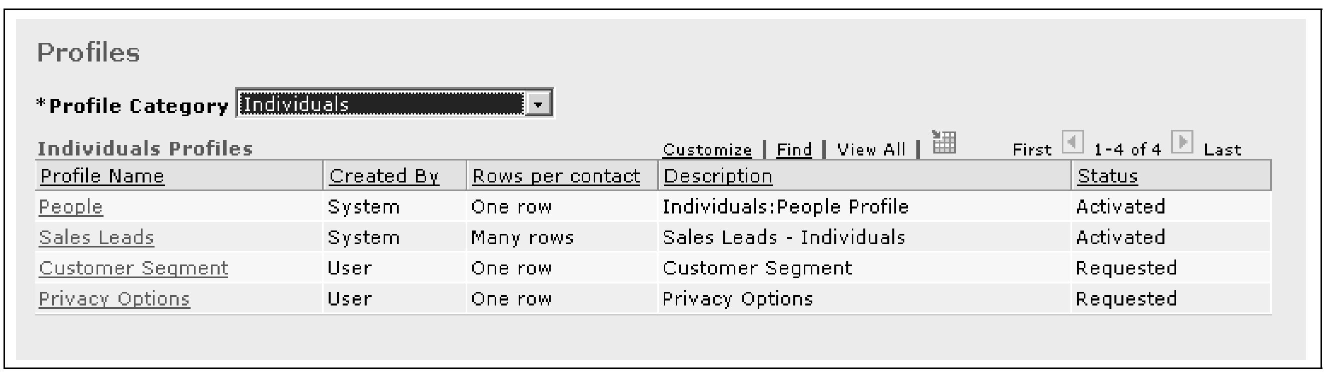
Note. Unless the system administrator decides to create a custom tablespace for profile tables, use the RALARGE tablespace.

Pages Used to Register a Profile

Page Name	Object Name	Navigation	Usage
Profile	RA_PROFILE_DTL	Set Up CRM, Common Definitions, Customer, Profile Management, Profile Registration, Profiles	View the profiles that are registered.
Profile Registration - Profile Fields - Field Summary	RA_ATTRIBUTE_SUMM	• Click a Profile Name link on the Profile page. • Click the Field Summary link on the Profile Fields - Field Detail page.	Enter or view summary information about profile fields.
Profile Registration - Profile Fields - Field Detail	RA_ATTRIBUTE_DTL	Click the Field Detail link on the Profile Fields - Field Summary page.	Enter or view detailed information about profile fields.

Viewing Registered Profiles

Access the Profiles page.

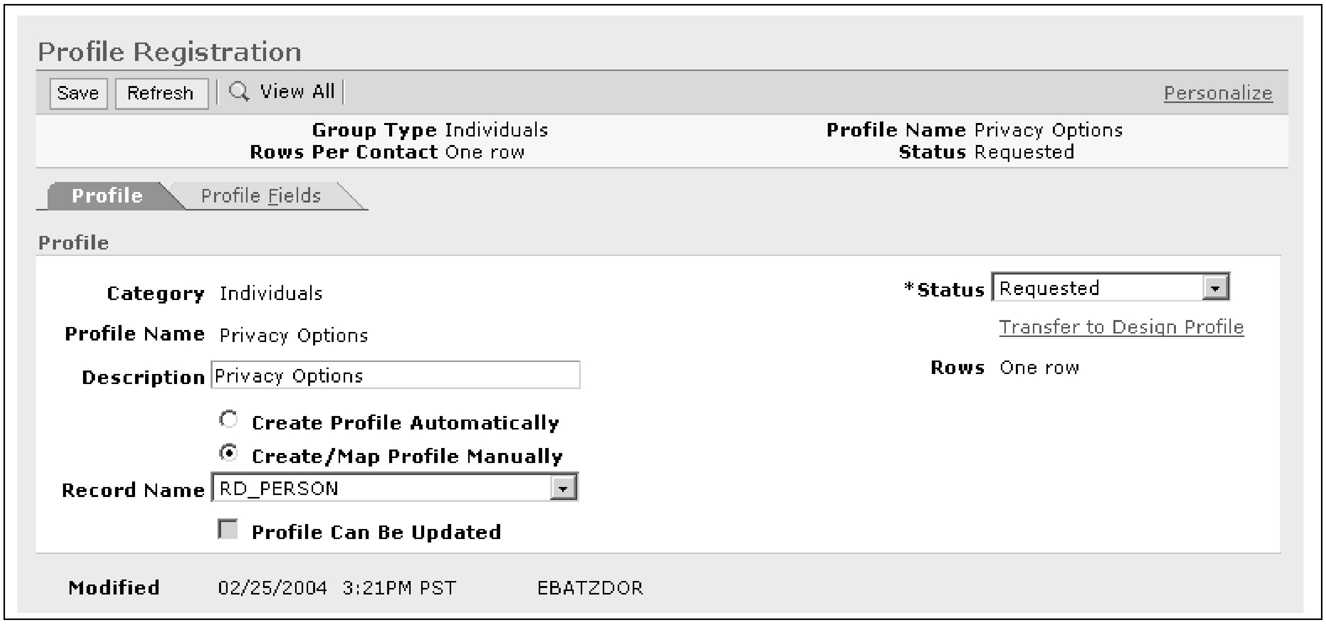


Profiles page

This page enables you to view all the profiles that are defined to the system. Click a Profile Name to view or modify profile detail.

Reviewing the Profile Request

Access the Profile Registration - Profile page.



Profile Registration - Profile page

Status

Select *Activated* when the profile registration is complete. This makes the profile available for use.

Select *Rejected* when the profile request is unacceptable and must be redefined or discarded.

Select *Requested* when the profile has not been registered and activated.

Note. If the profile was automatically created, and reactivation requires changes to the record (table), the profile status is changed to "Activating" until the necessary processing is complete.

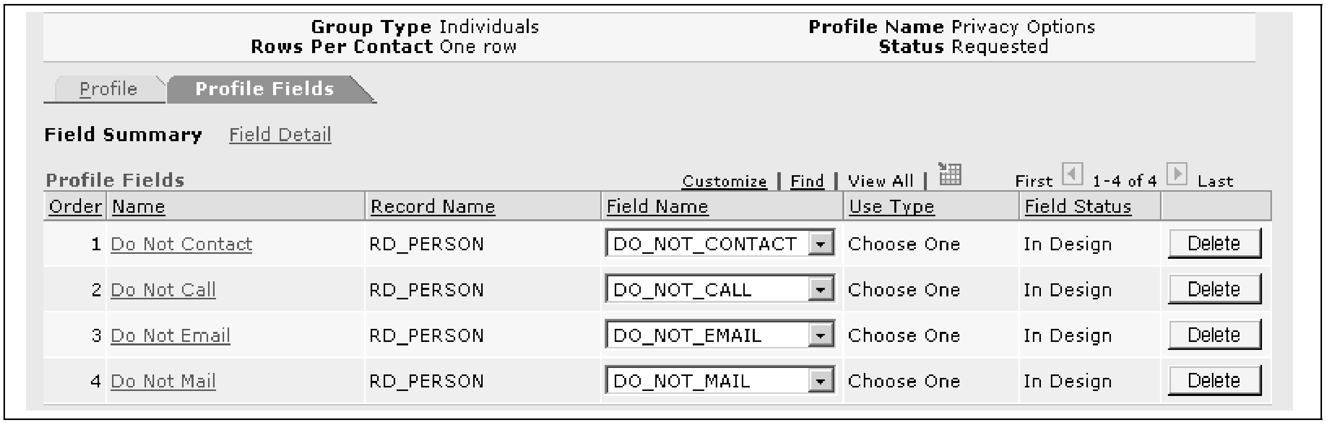
Record Name

Select the record (table) created for this profile.

Mapping Field References

Access the Profile Registration - Profile Fields page.

Note. The Profile Fields pages of profiles that were automatically created (and thus, automatically mapped) do not display the Record Name and Field Name columns on the Profile Fields grid.



Profile Registration - Profile Fields page

Name

Displays the profile field name.

Record Name

Confirm the profile table record name. If the profile field is a Choose Many use type, select the correct child record. If the profile field is a Map to Existing Field use type, confirm that the Map to Field field on the Profile Fields - Field Detail page is set to the appropriate prompt table record name.

Field Name

Select the profile record field name that corresponds to the profile field name.

Delete

Click to remove a profile field.

Note. Fields can not be deleted from an activated profile. Once a profile is activated, you can update field details, but the changes only affect profile use from the time of the change forward.

Completing the Activation Process

Once the profile fields are matched to the profile table (registered), return to the Profile Registration - Profile page, set the profile status to *Activated* and save the page to activate the profile.

Setting Up Profile Groups

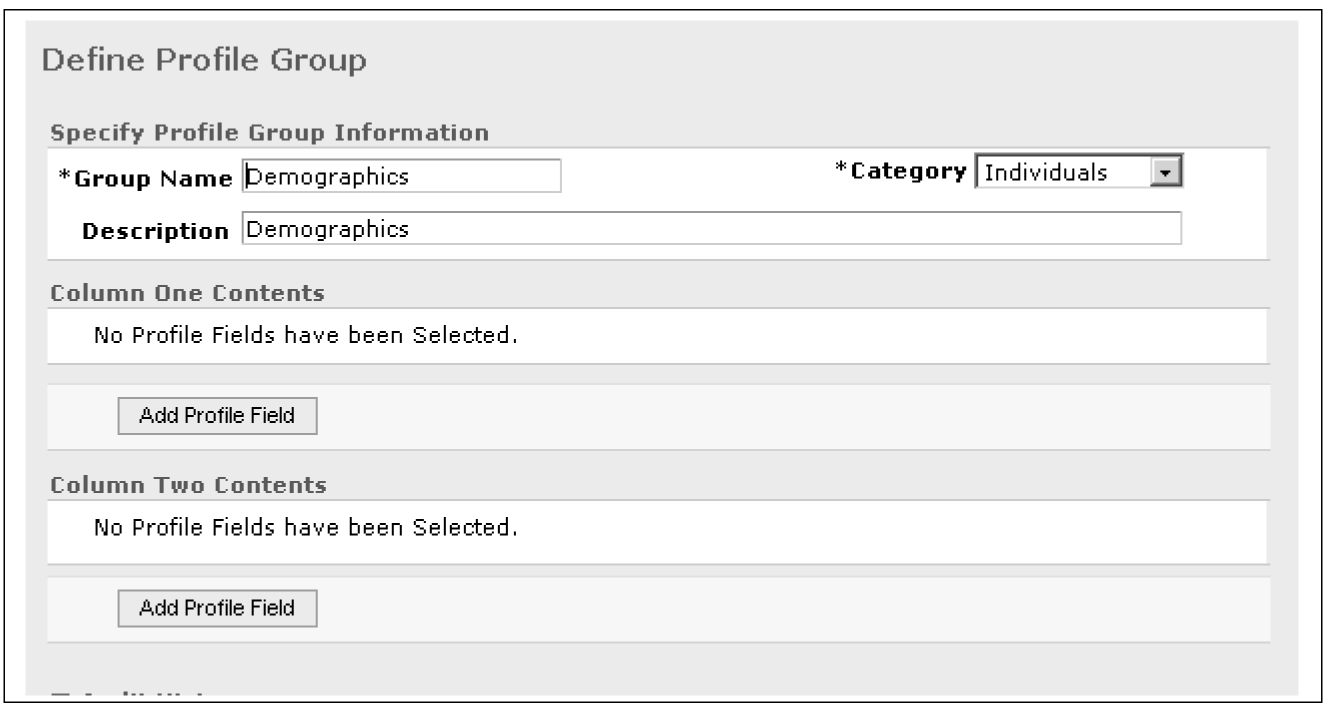
This section discusses how to set up profile groups.

Pages Used to Set Up Profile Groups

Page Name	Object Name	Navigation	Usage
Define Profile Group	RA_PRFL_GRP_PG1	Set Up CRM, Common Definitions, Profile Management, Profile Groups, Define Profile Group	Define profile groups.
Define Profile Group - Add Profile Field	RA_PRFL_FLD_SEL_PG	Click the Add Profile Field button on the Define Profile Group page.	Select profile fields to add to a profile group.
Assign Profile Group Display - Assign Profile Group Display	RA_CMPT_PRFL_PG	Set Up CRM, Common Definitions, Profile Management, Profile Groups, Assign Profile Group Display	Assign profile groups to a CDM component.
Assign Profile Group Display - Edit Condition	RA_CND_BLD_PG	 Click the Edit Condition button next to a profile group on the Assign Profile Group Display - Assign Profile Group Display page.	Specify the conditions under which the profile group fields appear on the More Info or Summary page.

Defining Profile Groups

Access the Define Profile Group page.



Define Profile Group - Define Profile Group page

Note. You can select only profile fields in "Activated" profiles for profile groups

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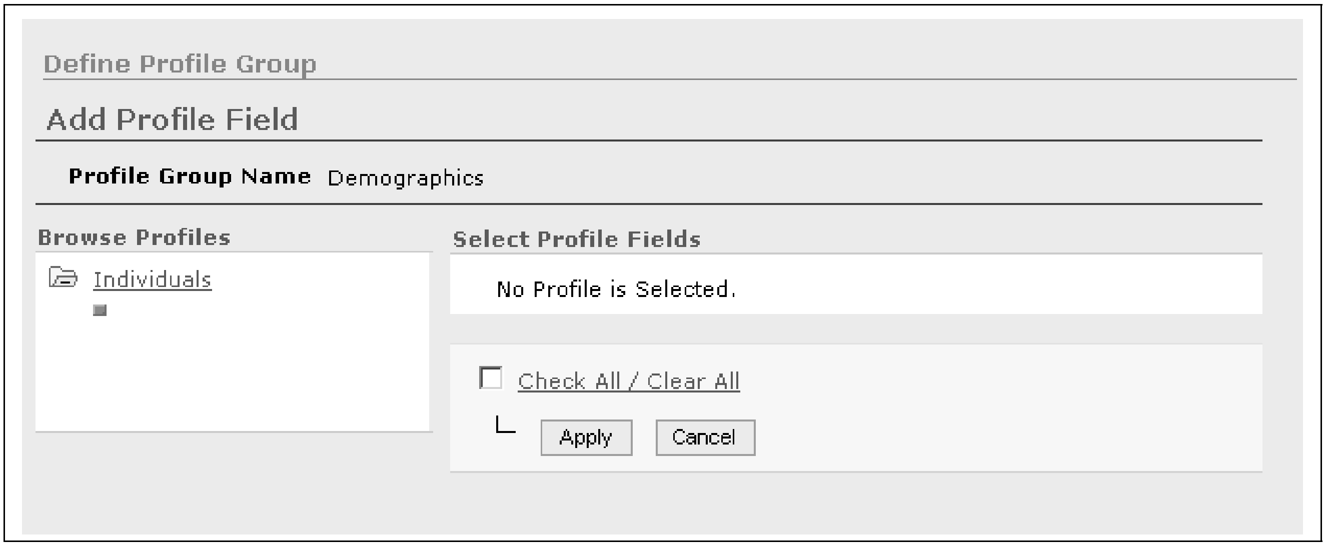
profile fields from the basic tables can not be added to profile groups

Selecting Profile Fields

Access the Define Profile Group - Add Profile Field page.



Define Profile Group - Add Profile Field page

Select a profile to view the fields that it contains. Select one or more fields and click Apply. You must apply the fields to the profile before saving the profile.

Assigning Profile Groups to CDM Components

Access the Assign Profile Group Display - Assign Profile Group Display page.

Assign Profile Group Display - Assign Profile Group Display page

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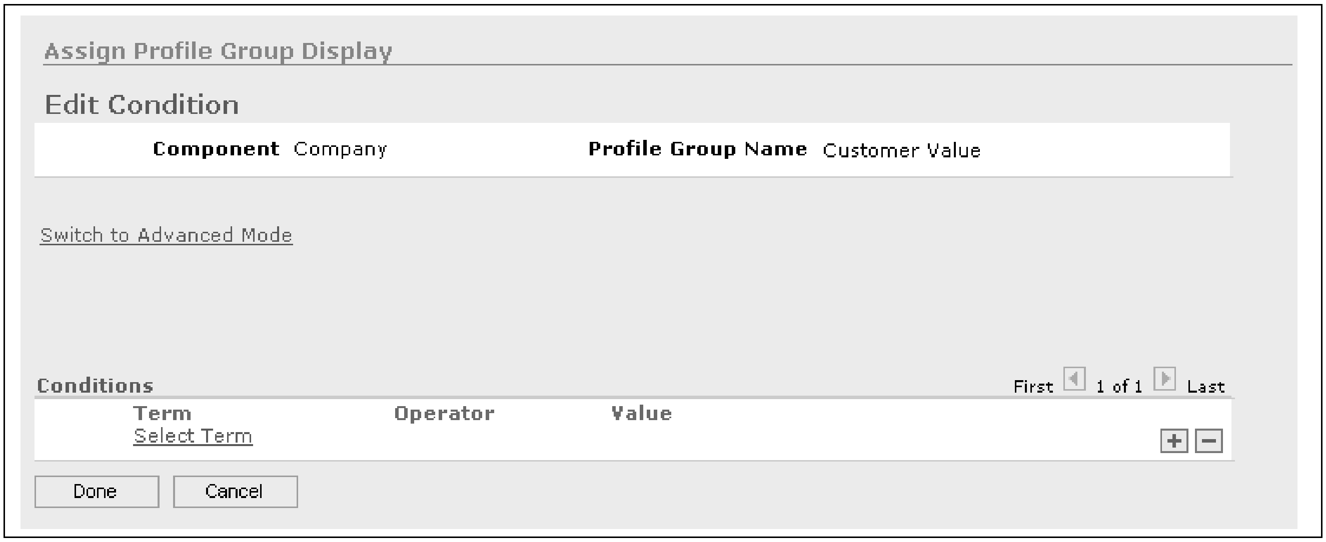
Note. The fields in the Profile Groups for Summary Page region are available for the Company and Partner Company components only.

Click to add a profile group to the component.

Specifying Conditions

Access the Assign Profile Group Display - Edit Condition page.



Assign Profile Group Display - Edit Condition page

Click a condition that is listed in the Conditions page region to view and edit the condition.

Switch to Advanced Mode	Click to specify complex conditions.
	Click the Edit Condition button to define the conditions under which the profile appears.

Note. Terms are programmatically created as profile fields are activated except for the type *Choose Many*. Most profile terms can be used anywhere AAF is used.

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, "Working with Active Analytics Framework"

Viewing and Updating Profile Data

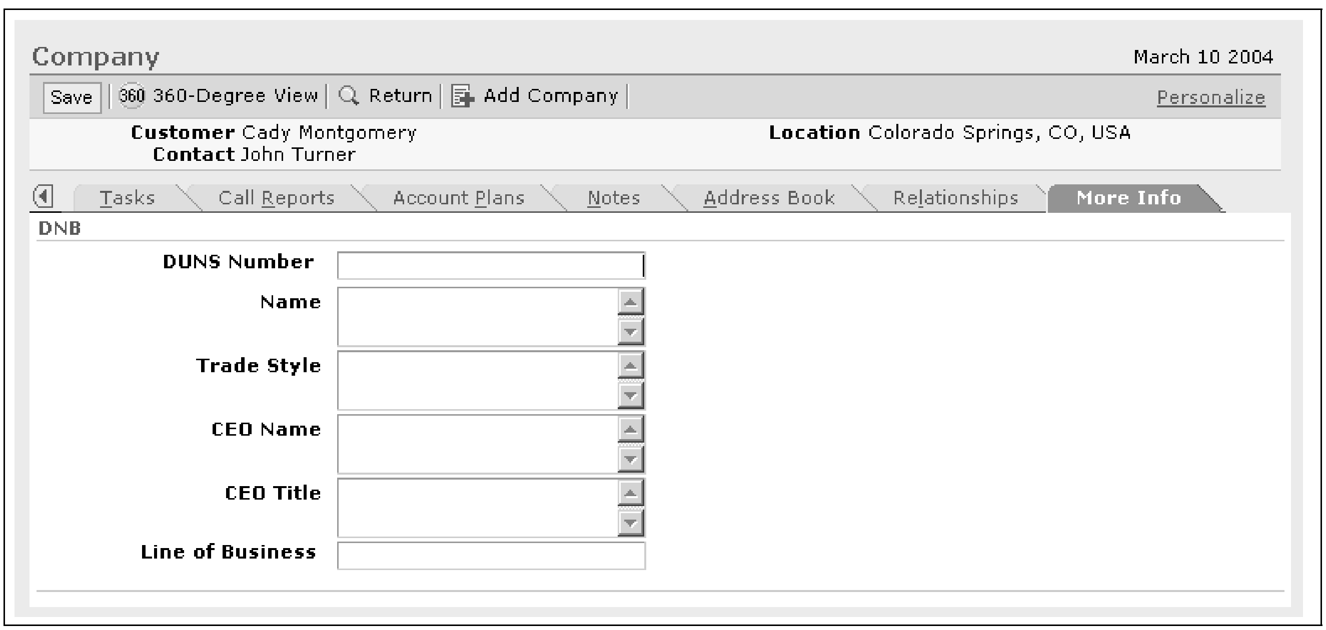
This section discusses how to view and update profile data information.

Pages Used to Manage Profile Data

Page Name	Object Name	Navigation	Usage
Company - More Info, Partner Company - More Info, Person - More Info	RD_PROFILE	• Customers CRM, Search Company, Company, More Info • Customers CRM, Search Person, Person, More Info • Partners CRM, Search Partner Company, Partner Company, More Info	View and update profile information.
Company - Summary	RD_COMPANY_SUMMARY	Customers CRM, Search Company, Company, Summary	View profile information for a company.
Partner Company - Summary	RD_PARTNER_SUMMARY	Partners CRM, Search Partner Company, Partner Company, Summary	View profile information for a partner company.

Viewing and Updating Profile Information

Access the More Info page for a company, person, or partner company.



Company - More Info page

CHAPTER 7

Working with the Relationship Viewer

This chapter provides an overview of the relationship viewer and discusses how to:

- Configure relationship views.
- Configure the relationship viewer.
- View and maintain relationships and roles.

Understanding the Relationship Viewer

This section discusses:

- The relationship viewer.
- Types of relationships.
- Implicit and explicit relationships.
- Roles in the relationship viewer.
- PeopleSoft Enterprise CRM sample relationship views.

The Relationship Viewer

The relationship viewer enables you to view, maintain, and add relationships for a specified business object, such as a company, site, consumer, contact, or ad hoc business object. You can configure relationship views that determine the relationships that appear in the Relationship Viewer. The relationship viewer is available as a standalone component, or you can access it from within the Company, Partner Company, Person, Site, Ad Hoc Business Object, and 360-Degree View components.

Types of Relationships

You can show four kinds of relationships in the relationship viewer: direct, indirect, peer-to-peer, and hierarchical. A *direct relationship* is established between two business objects of any type. For example, a direct relationship between a person and a company is established when you define the person as an employee of the company.

An *indirect relationship* is implied between two business objects that have the same type of relationship with a third business object. For example, even though two workers at a company work in different departments and are not directly related, they are indirectly related because they each have an employment relationship with the same company.

A *peer-to-peer relationship* is set up between business objects of the same type that share a direct relationship to a third business object of a different type. A peer-to-peer relationship formalizes an existing indirect relationship. Typically, you establish peer-to-peer relationships for the subset of indirect relationships that provide information that is relevant to the business objectives. For example, you might establish peer-to-peer relationships between the players who are on a company softball team to formalize the indirect relationship that these players already have to each other.

You can monitor relevant peer-to-peer relationships instead of viewing the entire set of indirect relationships. To continue the softball example, if the relationship viewer is configured to show direct relationships and peer-to-peer relationships, the relationship view shows that each player has a direct relationship to the company and a peer-to-peer relationship to the other players who are on the team. If you do not establish the peer-to-peer relationship between team members, you can only view all indirect relationships between the employees of the company and you cannot identify which employees have a team member relationship to each other.

Hierarchical relationships show parent-child relationships between business objects. Relationship hierarchies are graphically represented with a tree format in the relationship viewer. Parent-child relationships are defined by the relationship type and the designation of business object 1 and 2 in the relationship, where business object 1 is interpreted as the parent and business object 2, the child.

The tree format view is not limited to true hierarchical relationships. You can also present peer-to-peer relationships in a tree format by designating one of the two roles as the parent when you set up the relationship view.

Implicit and Explicit Relationships

From all of the components that include the relationship viewer, you can view relationships that are created both implicitly and explicitly. Implicit relationships are automatically recorded to capture a relationship that is implied by a specified transaction. For example, when a company is associated with a contact by using the Company component, the system automatically records a relationship between the company and the contact: Contact <- -> Company, relationship type ID 10. PeopleSoft provides system data, including role types and relationship types, for all implicit relationships. You can manually create or update implicit relationships by using the relationship viewer.

You can manually create explicit relationships by using the relationship viewer that is available in the Company, Consumer, Representative, Site, and ad hoc Business Object components. To create these relationships, you must set up the appropriate control values and configure a relationship view to recognize this type of relationship.

Roles in the Relationship Viewer

In PeopleSoft Enterprise CRM, each business object might have more than one role. Roles determine which default views appear in the relationship viewer.

For example, Jim Smith has both the Contact and Consumer roles and he is currently in focus on the relationship viewer. The Contact role has a priority of 1, and the Consumer role has a priority of 2. In this case, the default relationship views that appear for Jim Smith in the relationship viewer are those views that are defined for the Contact role.

PeopleSoft Enterprise CRM Sample Relationship Views

The sample data that accompanies the PeopleSoft Enterprise CRM installation CD contains these relationship views that you can modify to meet the business requirements:

Relationship View	Configuration
CONSUMER CONTACTS	Level 1: (Role) Individual Consumer Level 2: (Role) Contact Relationships: 1. Primary Contact <—> Consumer 2. Contact <—> Consumer
CONTACT VIEW	Level 1: (Role) Company Level 2: (Role) Contact Relationships: 1. Primary Contact <—> Company 2. Contact <—> Company
SITE CONTACTS	Level 1: (Role) Site Level 2: (Role) Contact Relationships: 1. Primary Contact <—> Site 2. Contact <—> Site
SITE VIEW	Level 1: (Role) Company Level 2: (Role) Site Relationships: Company <—> Site

Configuring Relationship Views

To configure relationship views, use the Configure Relationship Views (BO_RELVW_CONFIG) component.

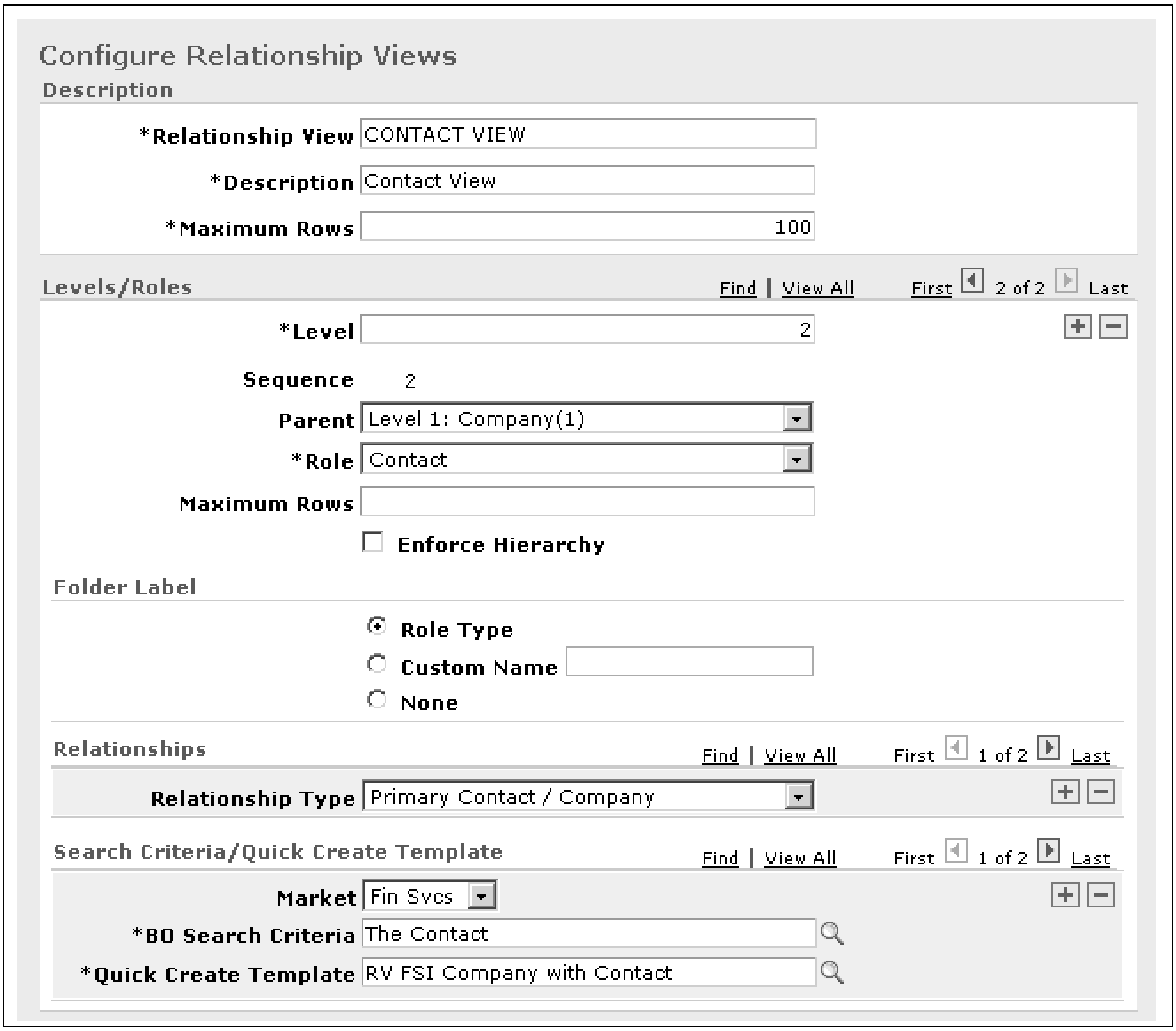
This section discusses how to configure relationship views.

Page Used to Configure Relationship Views

Page Name	Object Name	Navigation	Usage
Configure Relationship Views	BO_REL_VWCFG	Set Up CRM, Common Definitions, Customer, Configure Relationship Views	Create relationship views. The relationship view defines the tree that appears in a pane of the Relationship Viewer page.

Configuring Relationship Views

Access the Configure Relationship Views page.



Configure Relationship Views page

Maximum Rows Enter the maximum number of relationships to show on the Relationship Viewer page for the primary focus business object.

Levels/Roles

The fields that are in the Levels/Roles page region enable you to define the structure of the relationship tree.

Level Enter the level at which this role and relationship pair appears in the tree.

If you enter a level of *1,* the system removes the Relationships group box from the page and it hides the Parent field.

Parent Select the parent node for which this role and relationship pair appears in the tree.

Role Select the role for the node that appears in the tree.

Maximum Rows Enter the maximum number of relationships to show for this node of the tree on the Relationship Viewer page for the primary focus business object.

Enforce Hierarchy Select to enforce hierarchical relationships. This check box appears only for levels that are greater than one.

Folder Label

Use the options that are in the Folder Label group box to control how the relationship tree appears.

Role Type Select to have Role Type appear as the folder label on the tree.

Custom Name Select to enter a custom name to appear as the folder label on the tree.

None Select to have no label appear for the folder on the tree. Use none if you want to suppress adding new relationships of this type.

Relationships

This page region appears only if you select a level other than 1.

Relationship Type Select the relationship type for this role.

Search Criteria/Quick Create Template

Specify the business object (BO) search criteria or quick create template that are used when you add new relationships in the Relationship Viewer tree. If you specify a quick create template is specified, this template is used and has priority over the BO search criteria. If no quick create template is specified, then the search criteria are used.

Market Select the market.

BO Search Criteria Select a BO search criteria.

Quick Create Template Select a quick create template.

Configuring the Relationship Viewer

To configure the relationship viewer, use the Role Priority (BO_REL_PRIOROPT) component.

This section discusses how to:

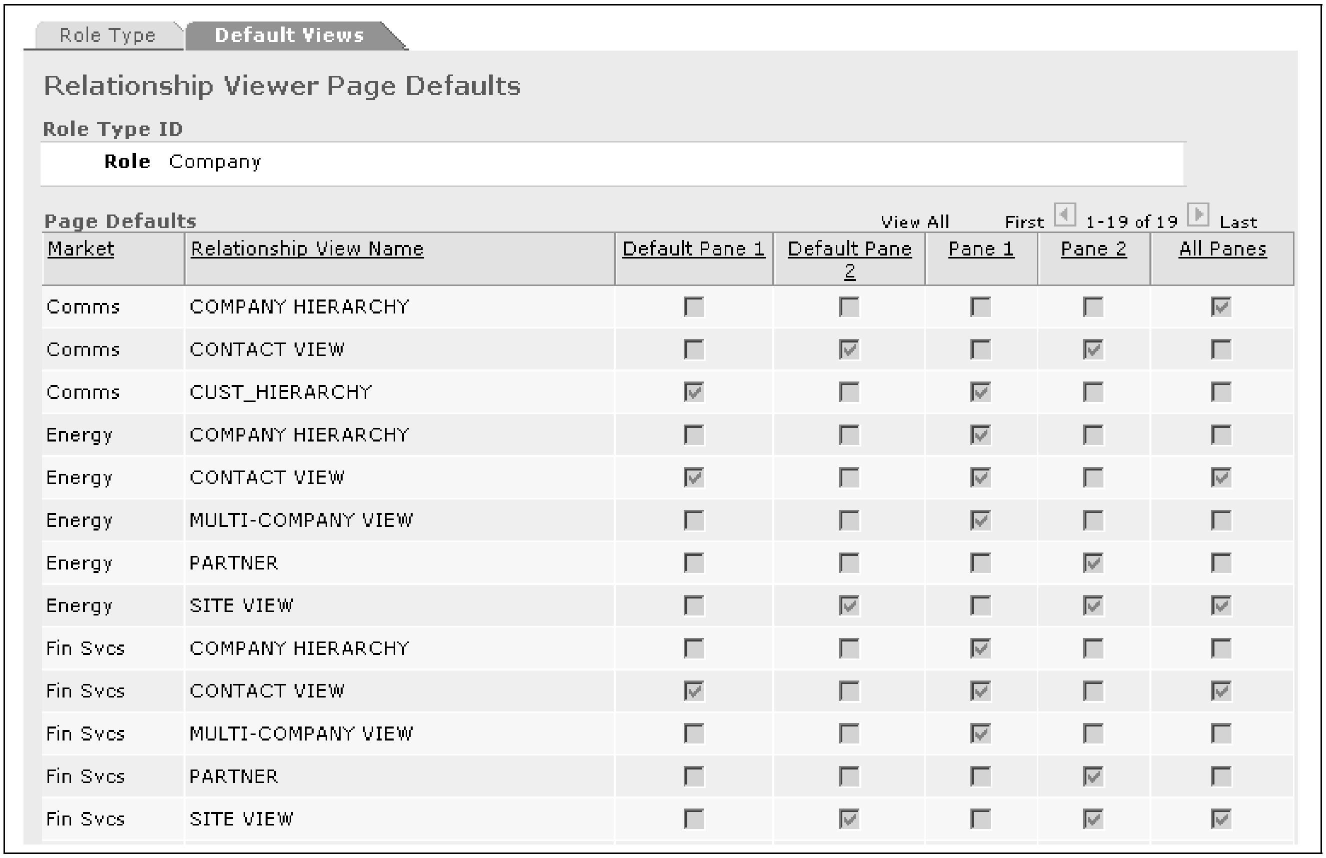
- Define Relationship Viewer page defaults.
- Prioritize rules for the relationship viewer.

Pages Used to Configure the Relationship Viewer

Page Name	Object Name	Navigation	Usage
Role Type - Default Views	BO_REL_ROLEDFLT	Set Up CRM, Common Definitions, Customer, Role Type, Default Views	Specify the default views that appear in both sections of the Relationship Viewer page and specify the views that are to appear in the Select View list on the Relationship Viewer page. You can use a relationship view in more than one market.
Role Priority - Role Priorities	BO_REL_ROLEPRIORITY	Set Up CRM, Common Definitions, Customer, Role Priority, Role Priorities	Prioritize roles to determine the default relationship views that appear in the Relationship Viewer.

Defining Relationship Viewer Page Defaults

Access the Role Type - Default Views page.



Market	Relationship View Name	Default Pane 1	Default Pane 2	Pane 1	Pane 2	All Panes
Comms	COMPANY HIERARCHY	☐	☐	☐	☐	☑
Comms	CONTACT VIEW	☐	☑	☐	☑	☐
Comms	CUST_HIERARCHY	☑	☐	☑	☐	☐
Energy	COMPANY HIERARCHY	☐	☐	☑	☐	☐
Energy	CONTACT VIEW	☑	☐	☑	☐	☑
Energy	MULTI-COMPANY VIEW	☐	☐	☑	☐	☐
Energy	PARTNER	☐	☐	☐	☑	☐
Energy	SITE VIEW	☐	☑	☐	☑	☑
Fin Svcs	COMPANY HIERARCHY	☐	☐	☑	☐	☐
Fin Svcs	CONTACT VIEW	☑	☐	☑	☐	☑
Fin Svcs	MULTI-COMPANY VIEW	☐	☐	☑	☐	☐
Fin Svcs	PARTNER	☐	☐	☐	☑	☐
Fin Svcs	SITE VIEW	☐	☑	☐	☑	☑

Role Type - Default Views page

Relationship View Name Select the relationship view that you want to associate with the role.

Default Pane 1 Select the default view that appears in Pane 1 of the Relationship Viewer page.

Default Pane 2 Select the default view that appears in Pane 2 of the Relationship Viewer page.

Pane 1 Select the views that you want as selection criteria for Pane 1.

Pane 2 Select the views that you want as selection criteria for Pane 2.

All Panes Select the views that are to appear as selection criteria in both Pane 1 and Pane 2.

Prioritizing Roles For the Relationship Viewer

Access the Role Priority - Role Priorities page.

Priority Enter a number in this field next to each role that you want to prioritize. The system uses this field to determine priority. Priority works from lowest number to highest number.

Viewing and Maintaining Relationships and Roles

This section discusses how to:

- View and maintain relationships.
- Add new relationships.
- View and maintain roles.

Pages Used to View and Maintain Relationships and Roles

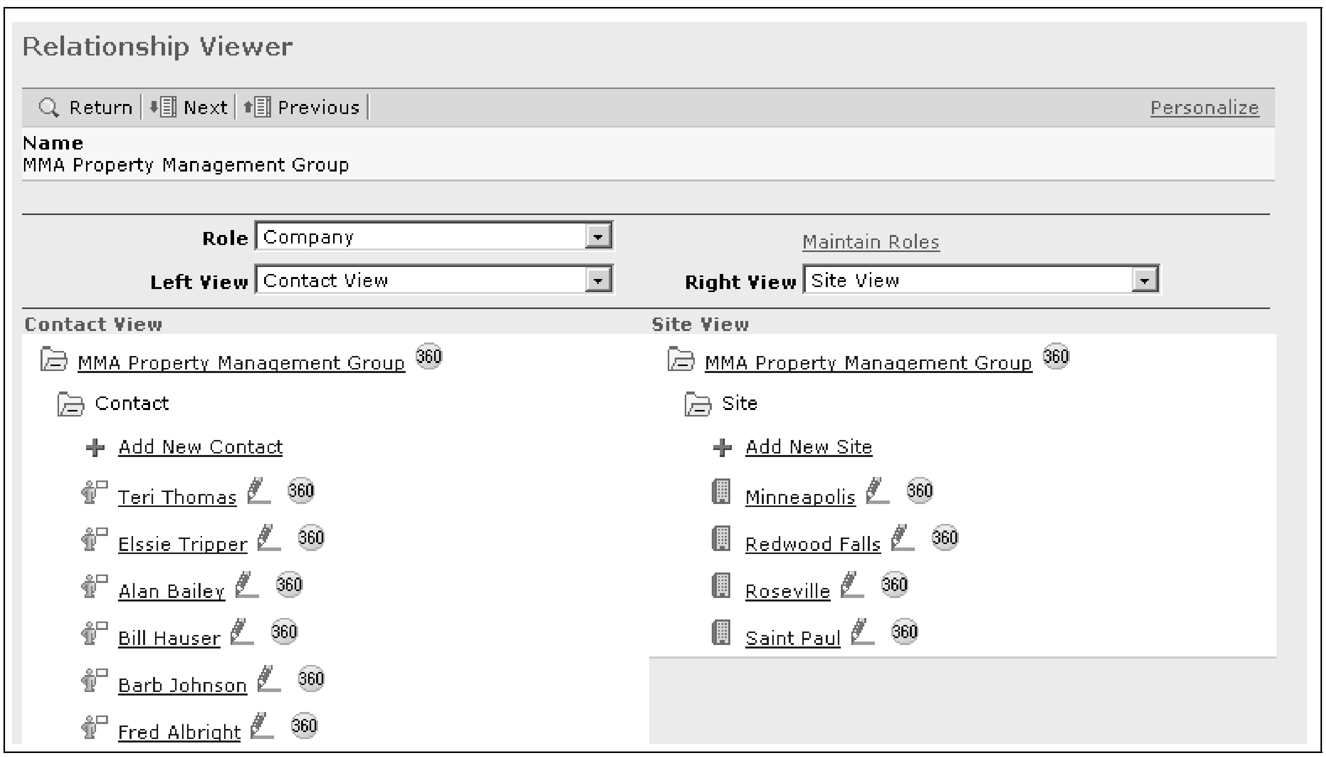
Note. The Relationship Viewer page and the business object Relationships pages are identical in appearance and use.

Page Name	Object Name	Navigation	Usage
Relationship Viewer	BO_REL_VIEW	Customers CRM, Relationship Viewer	View and maintain current relationships for a specified business object.
Company - Relationships	RD_COMPANY_REL	Customers CRM, Company, Relationships	View and maintain current relationships for a specified business object.
Consumer - Relationships	RD_PERSON_REL	Customers CRM, Consumer, Relationships	View and maintain current relationships for a specified business object.
Contact - Relationships	RD_PERSON_REL	Customers CRM, Contact, Relationships	View and maintain current relationships for a specified business object.
Site - Relationships	RD_SITE_REL_2	Customers CRM, Site, Relationships	View and maintain current relationships for a specified business object.
Business Object - Relationships	BO_REL	Customers CRM, Business Object, Relationships	View and maintain current relationships for a specified business object.
360-Degree View - Relationship Viewer	RB_TD_REL_VIEWER	Click the 360-Degree View from the main menu. Click the Relationship Viewer tab.	View and maintain current relationships for a specified business object.
Relationship viewer - Add New Relationship	BO_REL_VIEW_3	• Click the Add New link on the view detail of the Relationship Viewer page. • Click the Add New link on the view detail of the Relationships page in the Company, Consumer, Site, Contact, or Business Object component.	Add a new relationship.
Relationship Viewer - Update Relationship	BO_REL_VIEW_2	Click the pen edit button on the view detail of the Relationship Viewer page.	Update the relationship. You can modify the start date or end date for the relationship.

Page Name	Object Name	Navigation	Usage
Maintain Roles	MAINTAIN_ROLE_SEC	Click the Maintain Roles link on the Relationship Viewer or Relationships page for a component.	Maintain roles for a specified business object.
360-Degree View	RB_TD_AGENT_VIEW	Click the 360-Degree button on the view detail of the Relationship Viewer page.	Access the 360-degree view of the specified business object. See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Using the 360-Degree View”.

Viewing and Maintaining Relationships

Access the Relationship Viewer page or the Relationships page for any business object.



Relationship Viewer page

Role

Select the role for which you want to view relationships.

Select View

Select a relationship view that you want to appear in the corresponding pane of the page.

The views that appear as selection criteria for this field are defined on the Role Type - Default Views page.

See Chapter 7, “Working with the Relationship Viewer,” Configuring Relationship Views, page 95.

Maintain Roles Click to access the Maintain Roles page for the specified business object.

View Detail

The View Detail page regions show the relationships that are associated with the business object that is selected in a tree format. The default relationship view trees are based on the business object's roles and role priorities.

Click any link that is in the tree to view detail information for that business object. A PeopleSoft Enterprise CRM Business Object Relationship Model page for the business object type appears in a new browser. For example, if you click a contact link, the Contact - Contact page appears. If you click a site link, the Site - Site page appears.

The icons that appear to the left of the business object detail vary by business object. If no icon is specified for the business object, then a leaf icon appears in the relationship viewer for that business object.

See Chapter 3, "Defining Control Values for Business Objects," Modifying and Adding Role Types, page 22.

Add New <relationship> Click to add a new relationship.

The Add New Relationship link appears at the beginning of every node that you configure with a folder label when you configure the relationship view.

If the node is configured with a quick create template, the quick create page appears when the user clicks this link.

See Chapter 7, "Working with the Relationship Viewer," Configuring Relationship Views, page 96.

If the node is configured with a BO search criteria, the Add New <relationship> page appears.

See Chapter 7, "Working with the Relationship Viewer," Viewing and Maintaining Relationships and Roles , page 99.

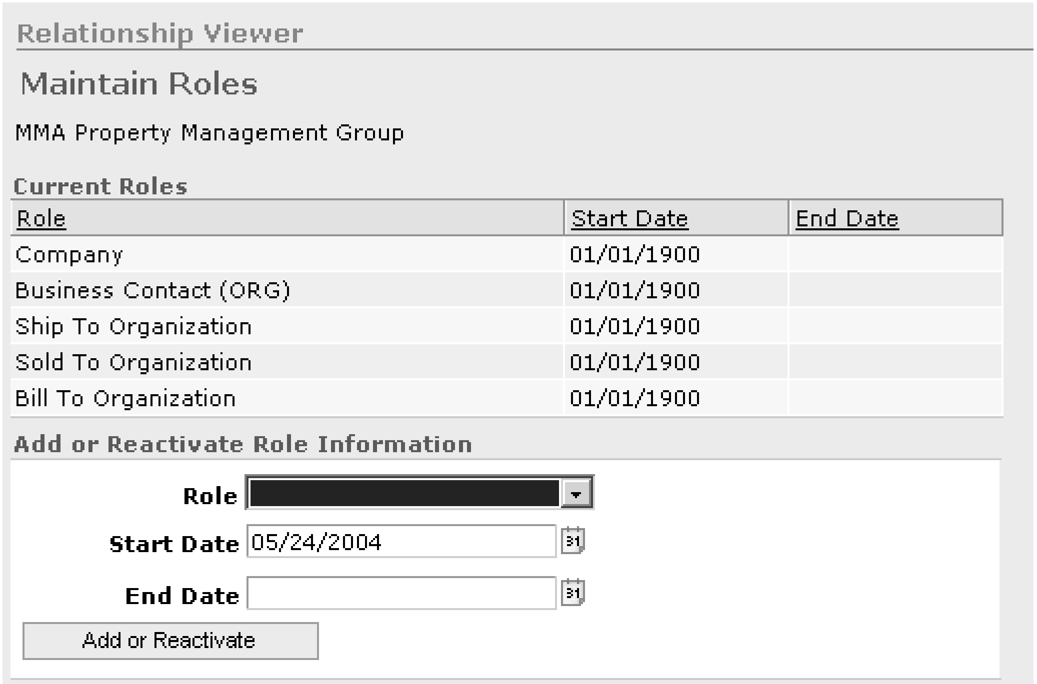
 Click to update the relationship.

 Click to display the 360-Degree View for the business object in a new browser window.

Note. The 360-Degree button only appears on the tree detail for role types that are supported by the 360-Degree View. See role type category 43 (360 Transfer Roles) for the list of valid role types.

Viewing and Maintaining Roles

Access the Relationship Viewer - Maintain Roles page.



Relationship Viewer - Maintain Roles page

When this page initially appears, all the roles that pertain to that specified business object with their start and end dates are listed in the Current Roles group box. An Inactivate button appears next to the roles that are current.

Inactivate	Click this button to inactivate the role. When you click this button, the Maintain Roles - Inactivate Role page appears. Enter the End Date for this role and then click the OK button.

Add or Reactivate Role Information

Role	Select the role to add or reactivate for this business object.
Start Date and **End Date**	Enter the start and end date that this role is in effect.
Add or Reactivate	Click this button after you select the role and the start and end date to add or reactivate the role that is for the specified business object.

PART 3

Data Management for Organization Business Objects

CHAPTER 8

Defining Company Business Objects

This chapter provides an overview of company records and discusses how to:

- Define company information.
- Define company sites.
- Define company contacts.

Understanding the Company Component

This section discusses:

- Company information.
- Partner companies.
- Markets.

Company Information

A company is an organization that purchases, leases, or contracts for product or services. In PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM), companies are represented as business objects with an Organization business object type and a Company role type. A record for each company is created in the Company table (RD_COMPANY). Because companies participate in business transactions, a record for the company is also created in the Business Contact table (BC), which enables you to define records for sold to, bill to, and ship to information for the company.

Each company can have one or more addresses that can apply to the company, its sites, or its contacts.

See Chapter 4, “Defining Name and Address Information for Business Objects,” page 45.

Sites

For each company, you can associate sites, or the geographic locations of the company where services are performed or products shipped or installed. Site records are maintained in the Site table (RD_SITE). When you associate a site with a company, a record is inserted in the Business Object Relationship table (BO_REL) to capture the relationship between the site and the company.

Contacts

You can also define the company's contacts: the people who participate in business transactions on behalf of the company. When you define company contacts in PeopleSoft Enterprise CRM, you can enter contact information for the contact that is specific to his or her role as a contact of the company. Records for contacts are maintained in the Person table (RD_PERSON). When you associate a person with a company or one of the company's sites, a record is created in the Business Object Relationship table to capture the contact relationship between the person and the company.

Attributes

You can configure the Company component to store installation-specific attributes. Because this is a customization, attributes that you add are not supported by PeopleSoft CRM. If you choose to configure additional attributes, you can make them visible on the Company component by using permission lists.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, "Setting Up PeopleSoft Customer Relationship Management Security and User Preferences," Setting System-Wide Security Options.

Integrations

You can also create and maintain company records in PeopleSoft Supply Chain Management or a third-party system and synchronize the company data with PeopleSoft Enterprise CRM by implementing the following enterprise integration points (EIPs): the Customer EIP, Customer_Company EIP, Customer_Consumer EIP, Customer_Site and Customer_Contact EIP.

Partner Companies

You can designate a company as a partner company. In PeopleSoft Enterprise CRM, partner companies are indirect sales channels that sell, fulfill, and distribute goods and services to customers through indirect sales channels.

See *PeopleSoft Enterprise Partner Relationship Management 8.9 PeopleBook*.

Markets

Pages that contain information about a person's financial accounts and bill payees appear only for installations that have licensed PeopleSoft Enterprise CRM Bill Presentment and Account Management or PeopleSoft Enterprise CRM Banking Transactions. This is controlled by the market that you specify on the User Preferences page.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "Setting Up PeopleSoft Customer Relationship Management Security and User Preferences," Defining Overall Preferences

PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook

PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook

Defining Company Information

To define company information, use the Company (RD_COMPANY_2) component.

This section discusses how to:

- Access companies
- Maintain general company information

Pages Used to Define Company Information

Page Name	Object Name	Navigation	Usage
Company Search	RD_COMPANY_GSRCH	Customers CRM, Search Company	Access an existing company.
Company - Summary	RD_COMPANY_SUMMARY	Select an existing company on the Company Search page.	View summary information about the company.
Company - Details	RD_COMPANY_DETAILS	• Customers CRM, Add Company • Customers CRM, Search Company Select an existing company on the Company Search page. Click the Details link.	Maintain general information about the company.
Company - Purchasing Options	RD_COMPANY_CUST_OP	Select an existing company on the Company Search page. Click the Purchasing Info link.	Maintain the company's purchasing information.
Company - Account Team	RD_ACCOUNT_TEAM	Select an existing company on the Company Search page. Select the Account Team tab.	Manage the account team that is assigned to the company,
Company - Tasks	RD_TASK_LIST	Select an existing company on the Company Search page. Select the Tasks tab.	Manage sales team tasks for a company.
Company - Call Reports	RD_CALLRPT_LST_TXN	Select an existing company on the Company Search page. Select the Call Reports tab.	View a list of call reports where the contacts of a Company are named as a participant.
Company - Account Plans	RD_ACCOUNT_PLAN	Select an existing company on the Company Search page. Select the Account Plans tab.	View the account plans that are for the company.

Page Name	Object Name	Navigation	Usage
Company - Notes	RD_COMPANY_NOTE_2	Select an existing company on the Company Search page. Select the Notes tab.	Maintain notes and attachments that are for the specified company.
Company - Address Book	RD_COMP_ADDR_BOOK	Select an existing company on the Company Search page. Select the Address Book tab.	Manage company contacts, addresses, and sites.
Company - Relationships	RD_COMPANY_REL	Select an existing company on the Company Search page. Select the Relationships tab.	Maintain company relationships.
Company - More Info	RD_PROFILE	Select an existing company on the Company Search page. Select the More Info tab.	Maintain company profile data.

Accessing Companies

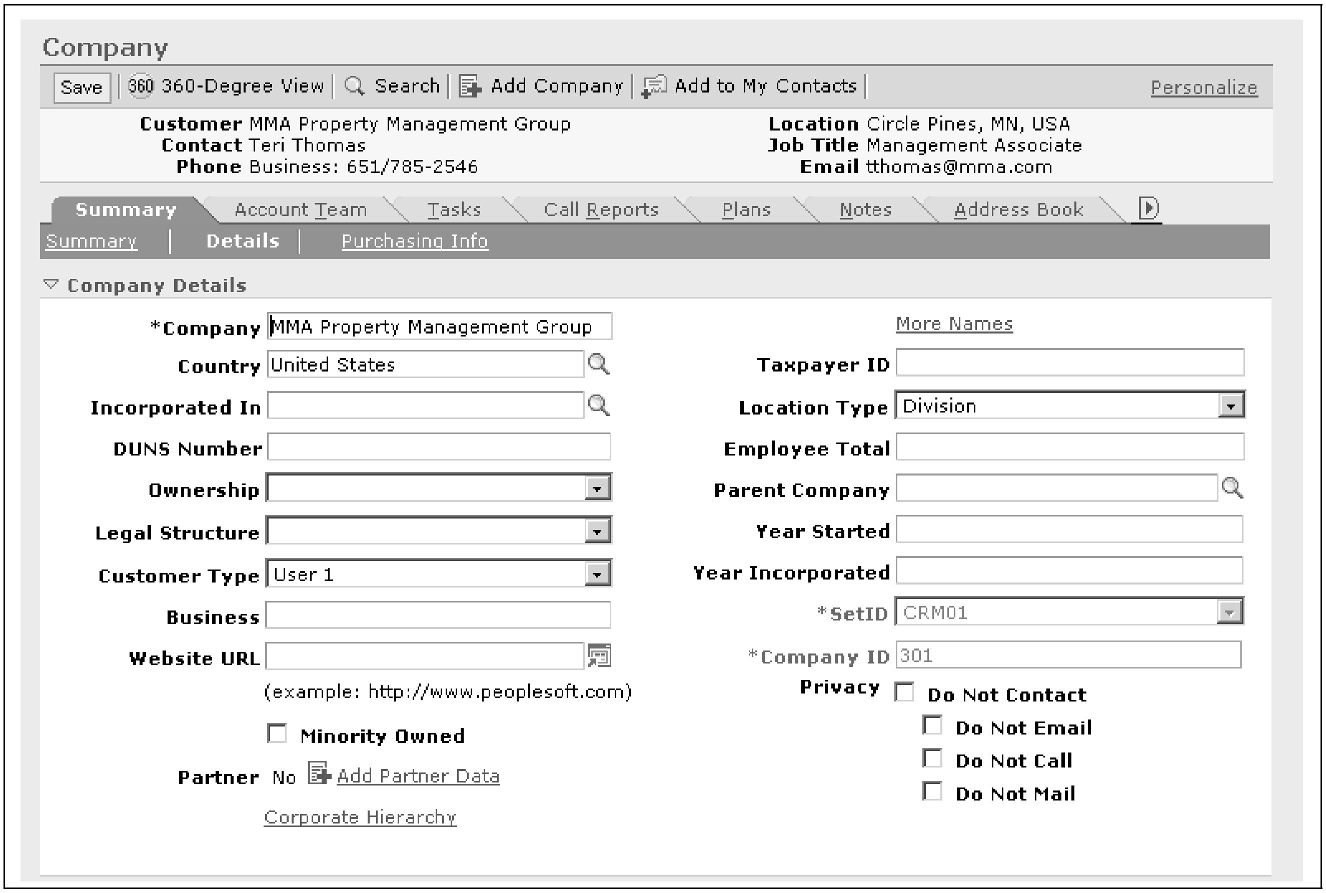
Access the Company Search page.

The appearance, behavior, and personalization options for this page are controlled by the search definition for the Company component.

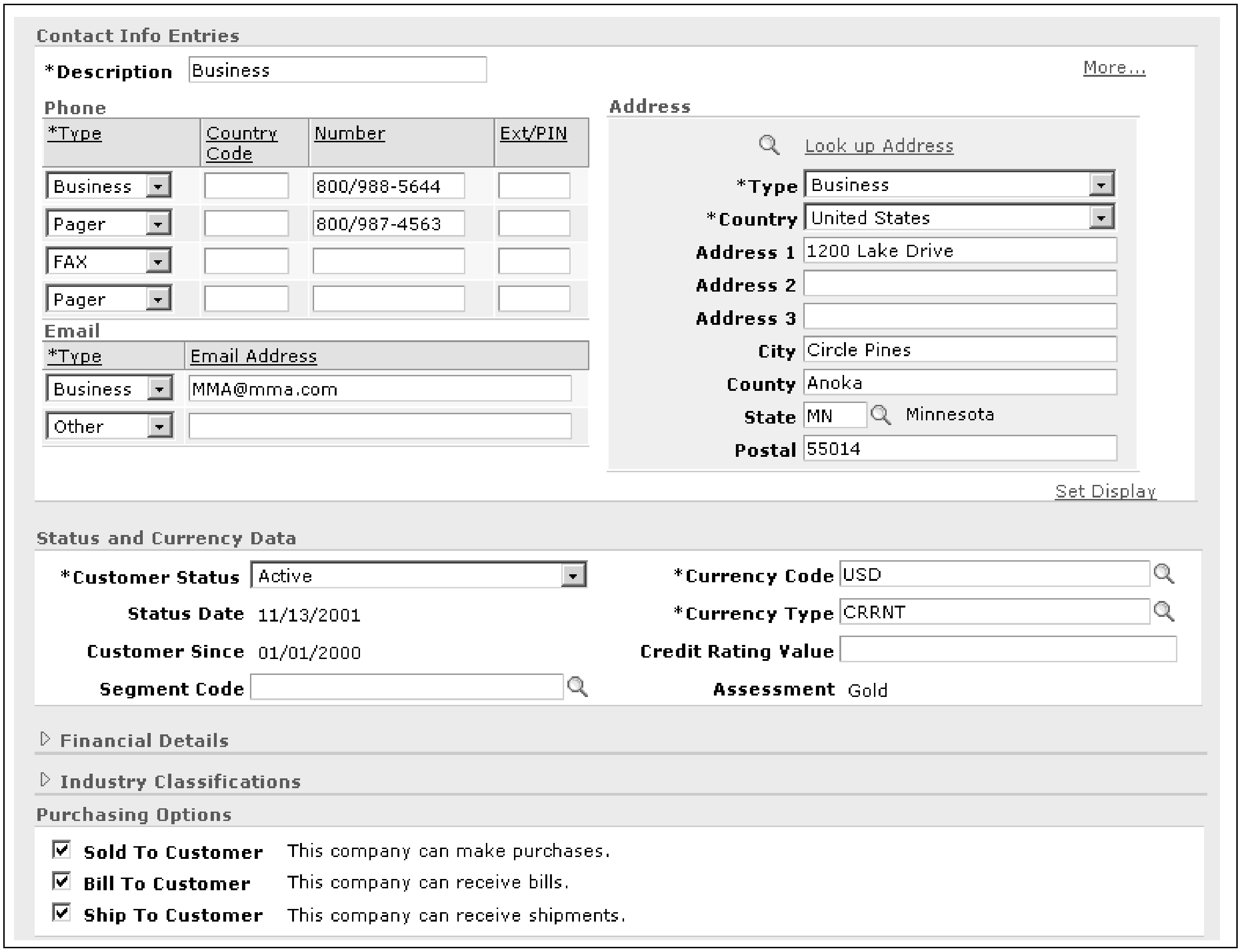
See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Configuring Search Pages”.

Maintaining General Company Information

Access the Company - Details page.



Company - Details page (1 of 2)



Company Details page (2 of 2)

Company Details

Use this page region to enter descriptive information about the company.

Company Name

Enter the company name. By default, the name that you enter here is the primary name for the company. You can click the More Names link to add additional names or designate another name as primary.

See Chapter 4, "Defining Name and Address Information for Business Objects," Updating Name Information , page 48.

Customer Type

Select a customer category for use in reports. You can modify the translate values, *User 1* to *User 4* to reflect categories that make sense for customer-tracking needs. For example, *User 1* might represent manufacturing customers, *User 2* might represent retail customers, and so on.

Business

Enter the customer's business type.

Location Type

Select a description of the company location. Values are *Branch, Division, Headquarters, Single Location,* and *Subsidiary.*

Parent Company

Enter the name of the parent company. You must establish parent companies in the system before associating them with subsidiaries. When you save the component, the system automatically creates a relationship between the two company business objects.

Click this button to transfer to the website that is specified in the Website URL field.

Add Partner Data and **Edit Partner Data**

Click the Add Partner Data link to add the Partner role to a company. If the company already has the Partner role, the link text changes to Edit Partner Data.

You transfer to the Partner Company component on which you can view or update partner information.

Corporate Hierarchy

Click this link to access a hierarchical tree view of selected relationships that are specified for the company in the Corporate Hierarchy component.

Privacy

Select one of these options to indicate the channels for which the company requests stoppage of all unsolicited communications from the business.

Contact Info

Enter contact information for the company.

See Chapter 4, "Defining Name and Address Information for Business Objects," Maintaining Contact Information, page 53.

Status and Currency Data

Customer Status

Select *Active* or *Inactive.*

Customer Since

Enter the date that the company becomes a customer of your business.

Note. If you integrate with PeopleSoft Financial Management Solutions or PeopleSoft Supply Chain Management, you cannot modify the customer status information and the customer since date in PeopleSoft Enterprise CRM.

Currency Code

Select the code that specifies the currency that you use for a monetary transaction with this company.

Currency Type

Select the exchange rate type that is used to calculate monetary transaction amounts in alternate currencies.

Credit Rating Value

Enter the company's credit rating, if it's known.

Segment Code

Select the company's business segment for marketing purposes.

Assessment

Displays the customer's key performance indicator value that is determined by PeopleSoft Enterprise Performance Management.

See Chapter 2, "Understanding Business Object Relationship Model Components," Customers and Business Contacts, page 9.

Purchasing Options

Indicate which purchasing tasks are valid for the company.

See Chapter 5, "Defining Purchasing Options for Companies, Consumers, and Sites," page 63.

Sold To Customer, Bill To Customer, and **Ship To Customer** — Select if the company can make purchases, receive invoices, or receive shipments.

Managing Company Account Teams

Access the Company - Account Teams page.

See *PeopleSoft Enterprise Strategic Account Planning 8.9 PeopleBook*.

Managing Sales Team Tasks

Access the Company - Tasks page.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Working with Tasks”.

Viewing Call Reports

Access the Company - Call Reports page.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Working with Contacts,” Working with Call Reports.

Viewing Account Plans

Access the Company - Account Plans page.

See *PeopleSoft Enterprise Strategic Account Planning 8.9 PeopleBook*.

Adding Notes

Access the Company - Notes page.

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

Managing Company Contact Information

Access the Company - Address Book page.

See Chapter 4, “Defining Name and Address Information for Business Objects,” Maintaining Address Books for Business Objects, page 51.

Maintaining Company Relationships

Access the Company - Relationships page.

See Chapter 7, “Working with the Relationship Viewer,” page 93.

Maintaining Company Profile Data

Access the Company - More Info page.

See Chapter 6, “Working with Business Object Profiles,” page 73.

Defining Company Sites

This section discusses how to define company sites.

See Also

Chapter 4, "Defining Name and Address Information for Business Objects," Defining Customer Sites, page 61

Pages Used to Define Company Sites

Page Name	Object Name	Navigation	Usage
Company Search	RD_COMPANY_GSRCH	Customers CRM, Search Company	Search for existing companies.
Company - Site	RD_COMPANY_SITE_2	Select an existing company on the Company Search page. Select the Address Book tab. Click the Sites link.	View a list of company sites and add new sites for the company.

Defining Company Contacts

This section discusses how to define a company's contacts.

See Also

Chapter 4, "Defining Name and Address Information for Business Objects," Defining Customer Contacts , page 57

Pages Used to Define Company Contacts

Page Name	Object Name	Navigation	Usage
Company Search	RD_COMPANY_GSRCH	Customers CRM, Company	Search for existing companies.
Company - Contacts	RD_COMPANY_CNTCT_2	Select an existing company on the Company Search page. Select the Address Book tab. Select the Contacts link.	Maintain the list of contacts who represent the company in business transactions.
Company - Add Contact	RD_REP_ADD_SRCH	Access the Company - Contacts page. Click the Add New Contact button.	Add a contact to a company.
Company - Maintain Contact	RD_REP_MAINTAIN	Access the Company - Contacts page. Click the Edit button that is next to a listed contact.	Maintain information for an existing company contact, including purchasing options and contact information.

CHAPTER 9

Defining Site Business Objects

This chapter provides an overview of how sites are modeled in PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM) and discusses how to:

- Maintain primary site information.
- Maintain sales information for the site.
- View installed products and services for a site.
- Define site relationships.

Understanding Sites

Sites in PeopleSoft Enterprise CRM are:

- Customers that are represented by contacts.
- Always associated with a company or a consumer business object.

Note. Sites can be used independently for the energy industry.

- Places where products are shipped or installed.
- Places where services are performed.

In the customer data model, sites are represented as organization type business objects with a role type of site. A record for each customer site is created in the Site table (RD_SITE) and a record for the association between a site and a company or consumer is inserted in the Business Object Relationship table (BO_REL). . Because the site that is associated with a customer can participate in business transactions, a record for the site is also created in the Business Contact table (BC), which enables you to specify sold to, bill to, and ship to purchasing options for the site.

Site contacts are Person business objects and are also contacts of the company or consumer that is associated with the site. When you associate a person with a customer site, the person is assigned a role type of contact for both the site and the customer with whom the site is associated. Two records are inserted in the Business Object Relationship table (BO_REL): one record to capture the relationship between the person and the site and one record to capture the relationship between the person and the customer associated with the site.

You can publish customer site information to PeopleSoft Supply Chain Management (PeopleSoft SCM) by using the following Customer_Site EIP. However, because PeopleSoft Supply Chain Management does not have a site concept, site records are created as customer records in the PeopleSoft Supply Chain Management system. Customer records in PeopleSoft SCM are created only for site that are flagged as either sold to bill to sites in PeopleSoft Enterprise CRM.

See Also

Chapter 2, "Understanding Business Object Relationship Model Components," Customers and Business Contacts, page 9

Chapter 10, "Defining Person Business Objects," Defining Information for Business Contacts, page 139

Chapter 4, "Defining Name and Address Information for Business Objects," page 45

Chapter 16, "Managing Enterprise Integration for PeopleSoft Enterprise CRM ," page 269

PeopleSoft Enterprise Components for CRM 8.9 PeopleBook

Setting Up Site Types

To set up site types, use the Site Type (RD_SITE_TYPE) component.

This section discusses how to set up site types.

Page Used to Set Up Site Types

Page Name	Object Name	Navigation	Usage
Site Type	RD_SITE_TYPE	Set Up CRM, Common Definitions, Customer, Site Type	Define codes that you use to categorize sites. Site type IDs must be unique for the specified set ID.

Maintaining General Site Information

To maintain general site information, use the Site (RD_SITE_2) component.

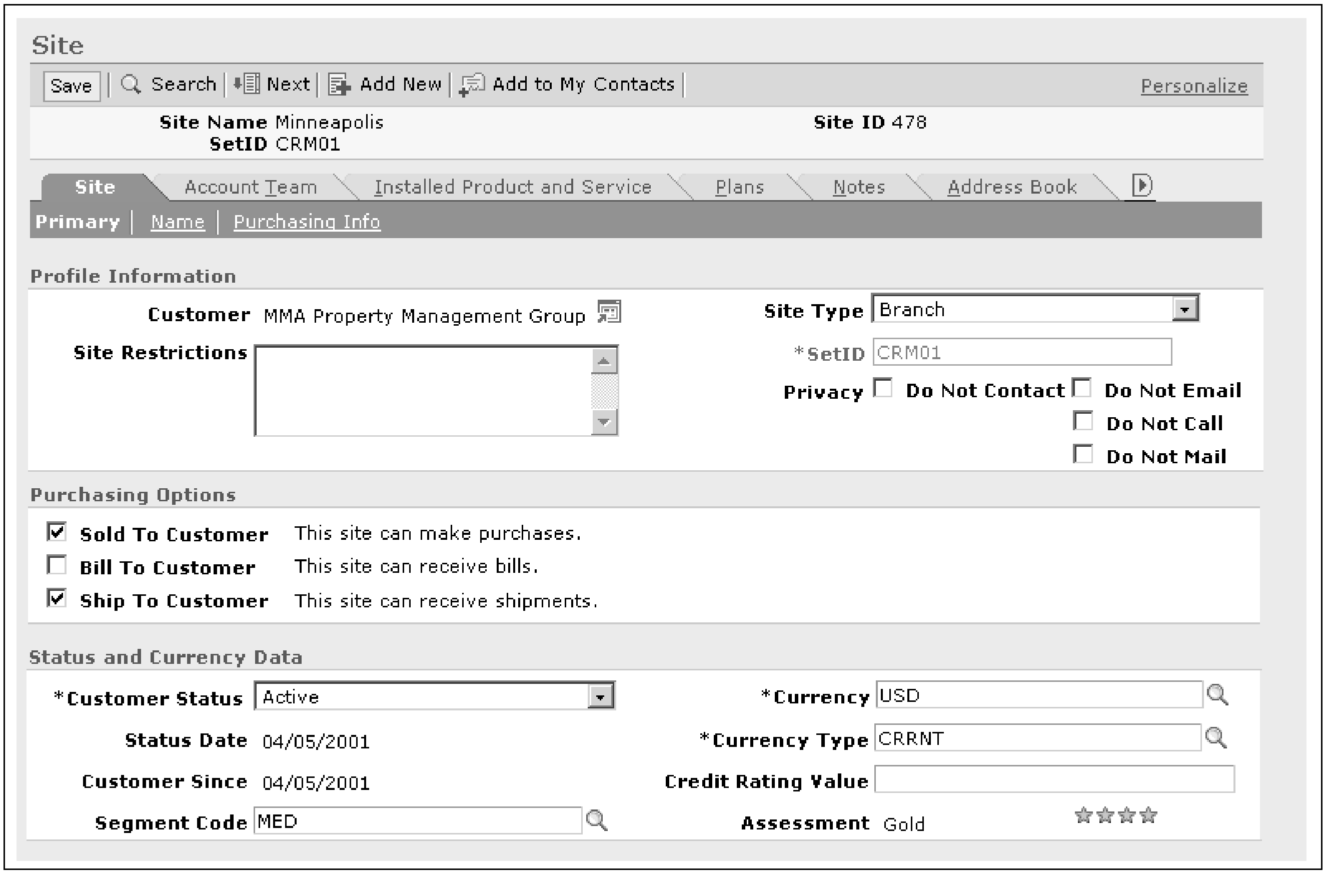
This section discusses how to define general information about sites.

Pages Used to Define and Update Site Information

Page Name	Object Name	Navigation	Usage
Site Search	RD_SITE_GSRCH	Customers CRM, Search Site	Search for existing sites.
Site - Primary	RD_SITE_MAIN_2	• Customers CRM, Add Site • Customers CRM, Search Site Select a listed site.	Maintain primary site information
Site - Name	RD_SITE_NAME_PG	Access the Site - Primary page. Click the Name link.	Maintain site names. Designate a primary site name.
Site - Purchasing Info	RD_SITE_CUST_OP_2	Access the Site - Primary page. Click the Purchasing Info link.	Maintain purchasing information for the site.
Site - Address Book	ABE_LIST	• Customers CRM, Search Site, Address Book • Customers CRM, Add Site, Address Book	Maintain contact information for a site, including addresses, phone numbers, and email information.
Site - Contacts	RD_SITE_CNTCT_2	Access the Address Book page for a site. Click the Contacts link.	Maintain site contacts.
Site - Notes	RD_SITE_NOTE_2	Customers CRM, Add Site, Notes Customers CRM, Search Site, Notes	Add notes and attachments for the specified site.

Maintaining Primary Site Information

Access the Site - Primary page.



Site - Primary page

Note. This screen shot does not show the page regions for entering contact information. Those page regions function similarly to the ones that appear on the Company component.

Name

This page region appears when you add a site. When you subsequently access the site, you must click the Name link to edit site name information.

See Chapter 4, "Defining Name and Address Information for Business Objects," page 45.

Profile Information

The fields in the Profile Information page region provide basic information about the site.

Customer	Displays the primary name of the customer with whom the site is associated. Click the transfer button to access the customer's primary information.
Site Type	Select the site type. Site types are established on the Site Types page.
Site Restrictions	Enter comments about any restrictions for the site.
Privacy	Select the appropriate privacy options for the site.

Purchasing Options

Select the purchasing options to enable for this site. Use the Purchasing Info page to enter detail about the selected purchasing options.

See Chapter 5, "Defining Purchasing Options for Companies, Consumers, and Sites," Defining Purchasing Options for Customers, page 64.

Status and Currency Data

Customer Status Select *Active* or *Inactive.*

Customer Since Enter the date that the site became a customer for your business.

Note. If you are integrated with PeopleSoft Financial Management Solutions or PeopleSoft Supply Chain Management, you cannot modify the customer status information and the customer since date in PeopleSoft Enterprise CRM.

Currency Code Select the code that specifies the currency that you use for a monetary transaction with this site.

Currency Type Select the exchange rate type that you use to calculate monetary transaction amounts in alternate currencies.

Segment Code Select the site's business segment for marketing purposes.

Assessment Displays the key performance indicator value as determined by PeopleSoft Enterprise Performance Management.

Contact Info

The primary site address, phone, and email information appear in this page region. To view and edit detail information or additional addresses, click the More.. link or access the Address Book page.

See Chapter 4, "Defining Name and Address Information for Business Objects," Maintaining Address Books for Business Objects, page 51.

Maintaining Site Names

Access the Site - Name page.

See Chapter 9, "Defining Site Business Objects ," Maintaining Site Names, page 121.

Maintaining Site Purchasing Options

Access the Site - Purchasing Info page.

See Chapter 5, "Defining Purchasing Options for Companies, Consumers, and Sites," Defining Purchasing Options for Customers, page 64.

Maintaining Site Contact Information

Access the Site - Address Book page.

See Chapter 4, "Defining Name and Address Information for Business Objects," Maintaining Address Books for Business Objects, page 51.

Adding Notes and Attachments

Access the Site - Notes page.

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

Maintaining Site Contacts

This section discusses how to maintain site contacts.

See Chapter 4, “Defining Name and Address Information for Business Objects,” Defining Customer Contacts , page 57.

Pages Used to Define Site Contacts

Page Name	Object Name	Navigation	Usage
Site - Contacts	RD_SITE_CNTCT_2	• Customers CRM, Add Site, Site, Address Book Click the Contacts link. • Customers CRM, Search Site, Site, Address Book Click the Contacts link.	Maintain site contacts.
Add Contact	RD_REP_ADD_SRCH	Access the Contacts page for a site. Click the Add Contact button.	Add a contact of a site.
Maintain Contact	RD_REP_MAINTAIN	Access the Contact Summary page for a site. Click the Edit button next to a listed contact.	Maintain purchasing options and contact info entries for a contact of a company, consumer, partner company, or site.

Defining Site Relationships

Access the Site - Relationships page.

See Chapter 7, “Working with the Relationship Viewer,” page 93.

Viewing Installed Products and Services for a Site

This section discusses how to view installed products and services for a site.

Pages Used to View Installed Products and Services for a Site

Page Name	Object Name	Navigation	Usage
Site - Installed Products	RD_SITE_INSTPROD	• Customers CRM, Add Site, Site Select the Installed Products and Services tab. • Customers CRM, Search Site, Site Select the Installed Products and Services tab.	View installed products for a site. **Note.** A site can have either Installed Products or Installed Services tab, but not both.

See Also

PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook, “Tracking Installed Products”

PART 4

Data Management for Individual Business Objects

CHAPTER 10

Defining Person Business Objects

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

- Configure the Person component.
- Define person information.
- Define information for business contacts.
- Define information for consumers.

Understanding Persons

This section discusses:

- Persons.
- Consumers and contacts.
- Workers.
- Integrations.

Persons

A person in PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM) has one or more of these roles: contact, consumer, or worker. Contacts, consumers, and workers are all business objects of the Individual type. PeopleSoft Enterprise CRM stores these business objects in the Person table (RD_PERSON).

Common information is stored for the person and additional information is stored for each specific role that the person has. You can configure the role-specific pages that appear when you initially access the Person component; the contact role pages appear by default.

You enter and update information for Contacts and Consumers by using the Person component in PeopleSoft Enterprise CRM. Information for workers, however, is specific to assigning the worker and is entered by using the Worker component.

Common Person Information

This information is available for all person roles:

- Name.

  See Chapter 4, "Defining Name and Address Information for Business Objects," Understanding Name and Address Information in PeopleSoft Enterprise CRM, page 45.

- Contact information.

  See Chapter 4, "Defining Name and Address Information for Business Objects," Contact Information for Business Objects, page 47.

- User-defined fields.

  User-defined fields provide the flexibility for you to define and enter additional person information that is not provided out-of-the-box.

- Details information.

  This is identifying information about a person, such as a driver's license number, preferred contact methods, and privacy flags.

- User profiles.

  User profiles include the person's user IDs, roles, and system permissions.

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

- Address book.

  See Chapter 4, "Defining Name and Address Information for Business Objects," Maintaining Address Books for Business Objects, page 51.

- Notes.

  See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, "Working with Notes and Attachments".

- More information.

  See Chapter 6, "Working with Business Object Profiles," page 73.

Markets

Pages that contain information about a person's financial accounts and bill payees appear only for installations that have licensed PeopleSoft Enterprise CRM Bill Presentment and Account Management or PeopleSoft Enterprise CRM Banking Transactions. This is controlled by the market that you specify on the User Preferences page.

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

Attributes

You can configure the Person component to store installation-specific attributes. Because this is a customization, attributes that you add are not supported by PeopleSoft CRM. If you choose to configure additional attributes, you can make them visible on the Person component by the Configure Person Component page.

See Chapter 10, "Defining Person Business Objects," Configuring the Person Component, page 130.

See Also

Chapter 2, "Understanding Business Object Relationship Model Components," page 7

PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook

PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook

Consumers and Contacts

Much of the information that appears in the Person component for consumers and contacts is similar. Both consumers and contacts perform the same activities: purchasing, leasing, or contracting for products or services. The difference is that consumers are customers and act on their own behalf, whereas contacts act on behalf of a customer or customer site.

In PeopleSoft Enterprise CRM, consumers are represented as person business objects with a business object type of Individual and a role type of Individual Consumer. Consumer records are maintained in the Person table. Because consumers participate in business transactions, a record for each consumer is also created in the Business Contact table (BC), which enables you to define records for sold to, bill to, and ship to information for the consumer.

Contacts are represented as business objects with a business object type of Individual and a role type of Contact. When a person is added to the system as a contact, a record for the person is inserted in the Person table. When the person is associated with a company, consumer, or site, a record is inserted in the Business Object Relationship table (BO_REL) to capture the relationship between the person and the company, consumer, or site. In addition to maintaining contact information for the Contact role, you can also maintain a separate set of contact information for a particular relationship for a contact (such as postal and email addresses and telephone and pager numbers) for each company, consumer, and site relationship. This information is used to contact the person when performing the contact role for a specific customer or site.

Contact and Consumer Information

This information is available for both consumers and contacts:

- National ID.

  See Chapter 3, “Defining Control Values for Business Objects,” Defining National ID Types, page 36.

- Credit cards.
- Tasks

  See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Working with Tasks”.

- Call reports.

  See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Working with Contacts,” Working with Call Reports.

- Relationships.

  See Chapter 7, “Working with the Relationship Viewer,” page 93.

Consumer-Specific Information

This information is available for consumers only:

- Purchasing options.

  See Chapter 5, “Defining Purchasing Options for Companies, Consumers, and Sites,” page 63.

- Status and currency data.

  See Chapter 2, “Understanding Business Object Relationship Model Components,” Customers and Business Contacts, page 9.

- Account team and plans.

See *PeopleSoft Enterprise Sales 8.9 PeopleBook*, "Working with Customer Accounts," Managing Customer Accounts.

- Contacts.

  You can associate contacts with a consumer. When you associate a contact with a consumer or one of the consumer's sites, a record is created in the Business Object Relationship table to capture the contact relationship between the contact and the consumer.

- Sites.

  Sites are the geographic locations where services are performed or products are sent. Site records are maintained in the Site table (RD_SITE). When you associate a site with a consumer, a record is inserted in the Business Object Relationship table to capture the relationship between the site and the consumer.

- Employment history and verification.

Contact-Specific Information

The Customers page is available only for persons with the contact role only.

Workers

A worker is any person who performs work for your organization, including employees and contractors. Worker information is used by PeopleSoft Support, HelpDesk, and Field Service applications and includes job detail and information that is used to manage worker assignment on service orders.

See Also

Chapter 11, "Defining Workers," page 143

PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook

Integrations

PeopleSoft Enterprise CRM is an integrated system. Much of the same information that is used by PeopleSoft Enterprise CRM applications and stored in the PeopleSoft Enterprise CRM Customer Data Model is also stored in other PeopleSoft applications and third-party systems. To avoid unnecessary data redundancy and to maintain data integrity, you can also implement enterprise integration points (EIPs) that automatically synchronize data updates between systems. The following EIPs are available for person data: CUSTOMER_CONSUMER, CUSTOMER_CONTACT, and WORKER.

See Also

Chapter 16, "Managing Enterprise Integration for PeopleSoft Enterprise CRM ," page 269

Configuring the Person Component

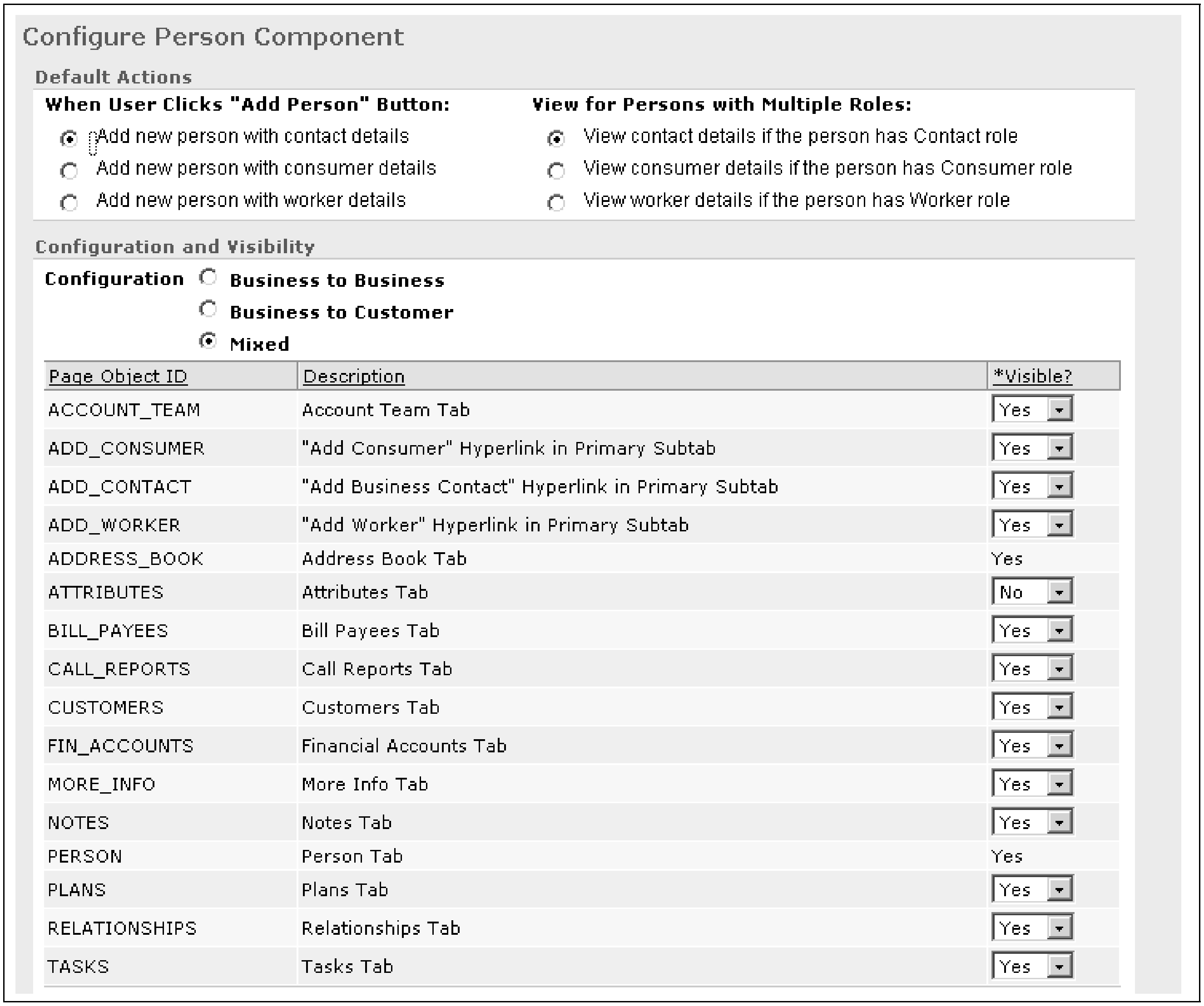
This section discusses how to select the Person default role.

Page Used to Configure the Person Component

Page Name	Object Name	Navigation	Usage
Configure Person Component	RD_PERSON_CONFIG	Set Up CRM, Common Definitions, Customer, Configure Person Component	Select the default role and the pages that appear in the Person component when a user adds a person, or views a person.

Selecting the Person Default Role

Access the Configure Person Component page.



Configure Person Component page

Default Actions

Select the role that is added when a user selects Add Person from the menu and the role that appears when a user selects an existing person.

Configuration and Visibility

Business to Business, Business to Customer, and **Mixed**: Select an option to indicate whether the PeopleSoft Enterprise CRM installation supports business-to-business, business-to-consumer, or both. The option that you select determines the default page object settings.

Visible: Select *Yes* to have the selected page or link appear on the Person pages that appear to the user.

Defining Person Information

To define person information, use the Person (RD_PERSON) component.

This section discusses how to:

- View and updating primary person information.
- View and updating person details.
- Maintain credit card information.
- Maintain user profile information.
- Maintain sales team tasks for a person.
- Access call reports for a person.
- Access notes and attachments for a person.
- Maintain address books for a person.
- View and update relationships.
- View and update person profile information.

Note. The search page that is used to access person records has two versions, depending on whether or not the user can view secured worker data. This is controlled by permission lists.

See Also

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

Pages Used to Define Person Information

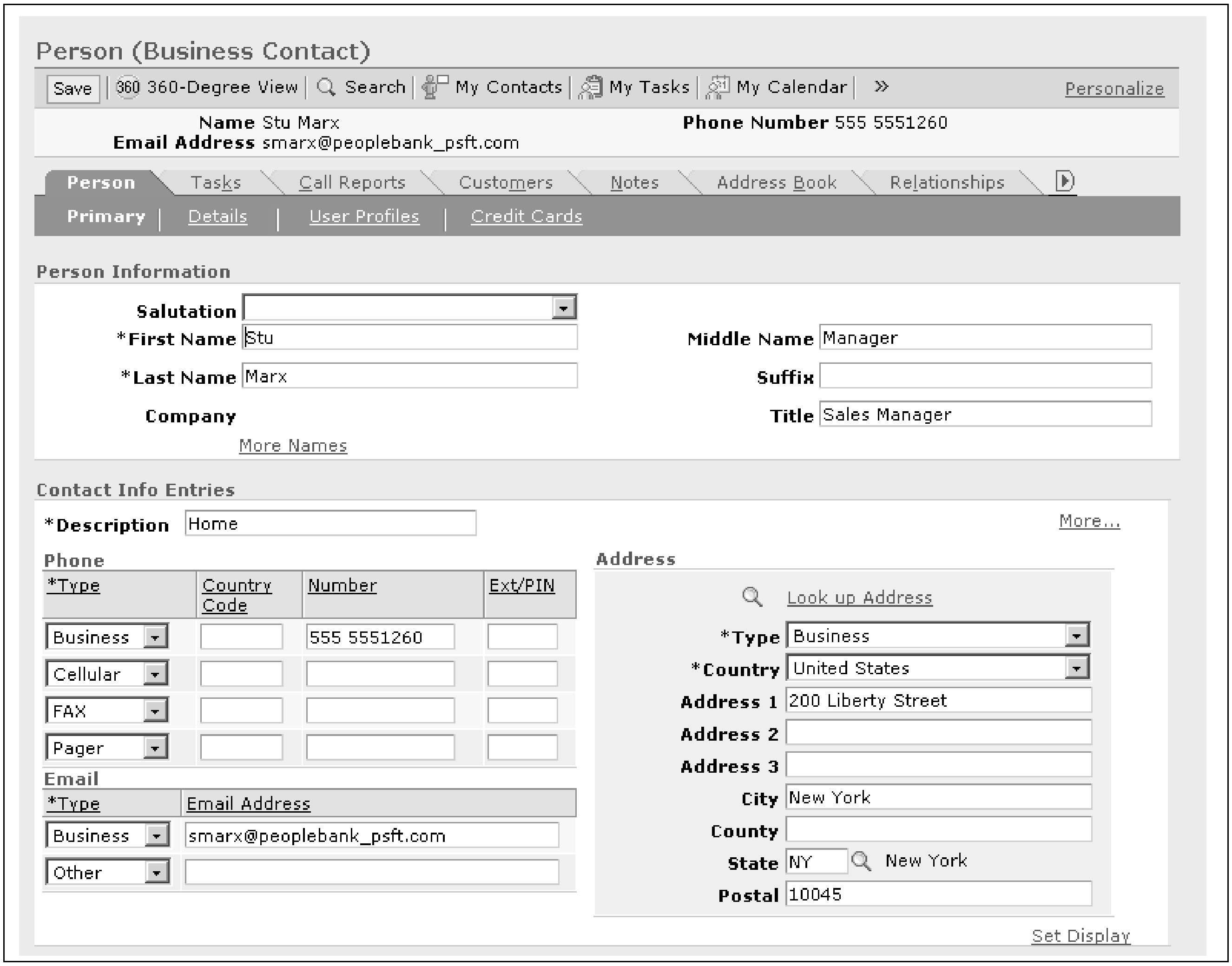
Page Name	Object Name	Navigation	Usage
Person Search	RD_PRSN_SRCH	Customers CRM, Search Person	Search for an existing person. This search page appears only for users that can view a worker's secured information.

Page Name	Object Name	Navigation	Usage
Person Search	RD_PRSN_SRCH_SEC	Customers CRM, Search Person	Search for an existing person. This search page appears only for users that cannot view a worker's secured information.
Person (<Role>) - Primary	RD_PRSN_PRIMARY	• Select an existing person on the Person Search page. Click the Primary link. • Customers CRM, Add Person Click the Primary link.	View and update primary (most important and frequently accessed) person information and select the person role to access. As delivered, the Business Contact role appears by default.
Person (<Role>) - Edit Labels for User Defined Fields	RD_PRSN_UDF_L_EDIT	Click the Edit User Defined Field Labels link on the Person - Primary page.	Modify the system-defined labels that appear for user defined fields.
Person (<Role>) - Details	RD_PRSN_DETAILS	Click the Details link on the Person page.	View and update person details.
Person (<Role>) - Credit Cards	PD_PERSON_CC	Click the Credit Card link on the Person page.	Maintain the customer or contact credit card information.
Person (<Role>) - User Profiles	RD_PERSON_USER	Click the User Profiles link on the Person page.	Maintain user information for a person who is permitted to access the online system.
Person (<Role>) - Tasks	RD_TASK_LIST	Select the Tasks tab on any page in the Person component.	Maintain sales team tasks for contacting a consumer or contact.
Person (<Role>) - Call Reports	RD_PRSN_CALL_RPTS	Select the Call Reports tab on any page in the Person component.	Access call reports for a person.
Person (<Role>) - Notes	RD_NOTES	Select the Notes tab on any page in the Person component.	Access notes and attachments for a person.
Person (<Role>) - Address Book	RD_PRSN_ADDR_BOOKS	Select the Address Book tab on any page in the Person component.	Maintaining contact information for a person.
Person (<Role>) - Relationships	RD_PERSON_REL	Select the Relationships tab on any page in the Person component.	View and update the person's relationships with other business objects.
Person (<Role>) - More Info (person - more information)	RD_PROFILE	Select the More Info tab on any page in the Person component.	View and update a person's marketing profile data.

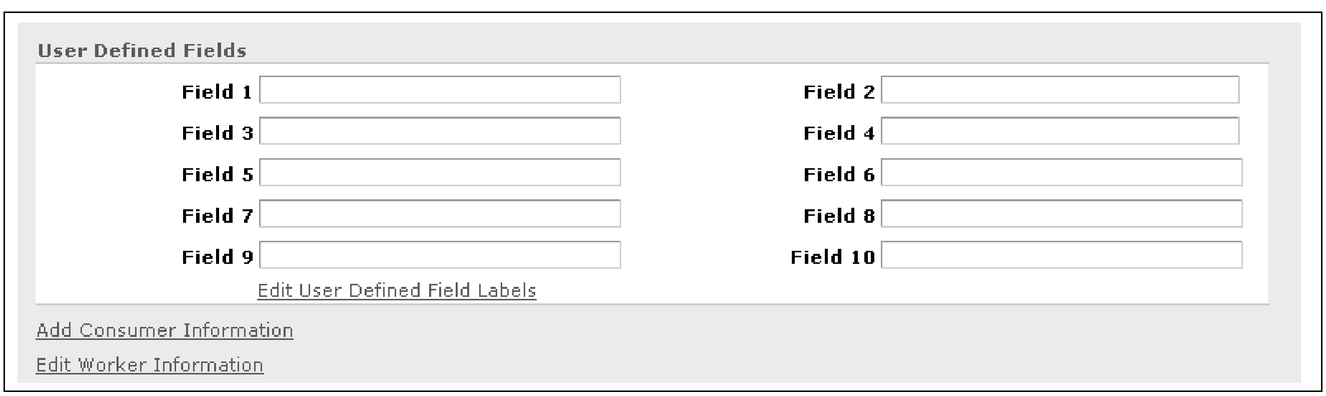
Viewing and Updating Primary Person Information

Access the Person (<Role>) - Primary page.

Note. Most pages in the Person component can appear for either the Business Contact or the Consumer roles. Those pages are noted with the (<Role>) label in the page title, where <Role> is either Business Contact or Consumer. If a page appears for only one of these roles, the role appears in the page title.



Person (<Role>) - Primary page (1 of 2)



Person (<Role>) - Primary page (2 of 2)

When you first access this page in add mode, the page is titled Person (Business Contact). When you access information for an existing person who either has the Contact role only or both the Contact and Consumer roles, the page is titled Person (Business Contact). The page is titled Person (Consumer) if you are viewing information for a person who has only the Consumer role.

You can configure which role appears by default when you add a person or search for a person who has both the Contact and Consumer roles.

See Chapter 10, “Defining Person Business Objects,” Configuring the Person Component, page 130.

The two links at the bottom of the page enable you to view information for another person role. Different links appear depending on which role is currently shown. For example, when the Consumer pages appear, the link reads “Add Contact Information” or “Edit Contact Information.” The links show the words *Add* or *Edit* depending on whether the role information already exists for the person.

Add Consumer Information and **Edit Consumer Information**

Click to add the Consumer role to the person or, if the Consumer role already exists for the person, to edit consumer information. The common information appears, but consumer-specific pages appear instead of contact-specific pages.

Note. This link appears if the Contact pages for a person currently appear.

Add Contact Information and **Edit Contact Information**

Click to add the Contact role to the person or, if the Contact role already exists for the person, to edit contact information.

Note. This link appears only if the Consumer pages for a person currently appear.

Add Worker Information and **Edit Worker Information**

Click to add or edit worker information for the person. The common information appears, but worker-specific pages appear instead of contact-specific pages.

Note. The Worker component is the primary place where worker information is viewed and updated.

See Chapter 11, “Defining Workers,” page 143.

Person Information

Enter basic name information. The name information appears differently depending on the country that is specified for the user. For example, in Japan, the last name appears in order before the first name.

See Chapter 4, “Defining Name and Address Information for Business Objects,” Updating Name Information , page 48 and *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Setting Up PeopleSoft Customer Relationship Management Security and User Preferences,” Defining Overall Preferences.

For double-byte operating systems, you can enter the name and address information in alternate character format.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Implementing Alternate Character”.

Contact Info Entries

Enter address, phone, and email information. Two Contact Info Entries page regions appear on this page : one for home information and one for business information

See Chapter 4, “Defining Name and Address Information for Business Objects,” Maintaining Address Books for Business Objects, page 51.

Alternate Character

For double-byte operating systems, you can enter the name and address information in alternate character format.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Implementing Alternate Character”.

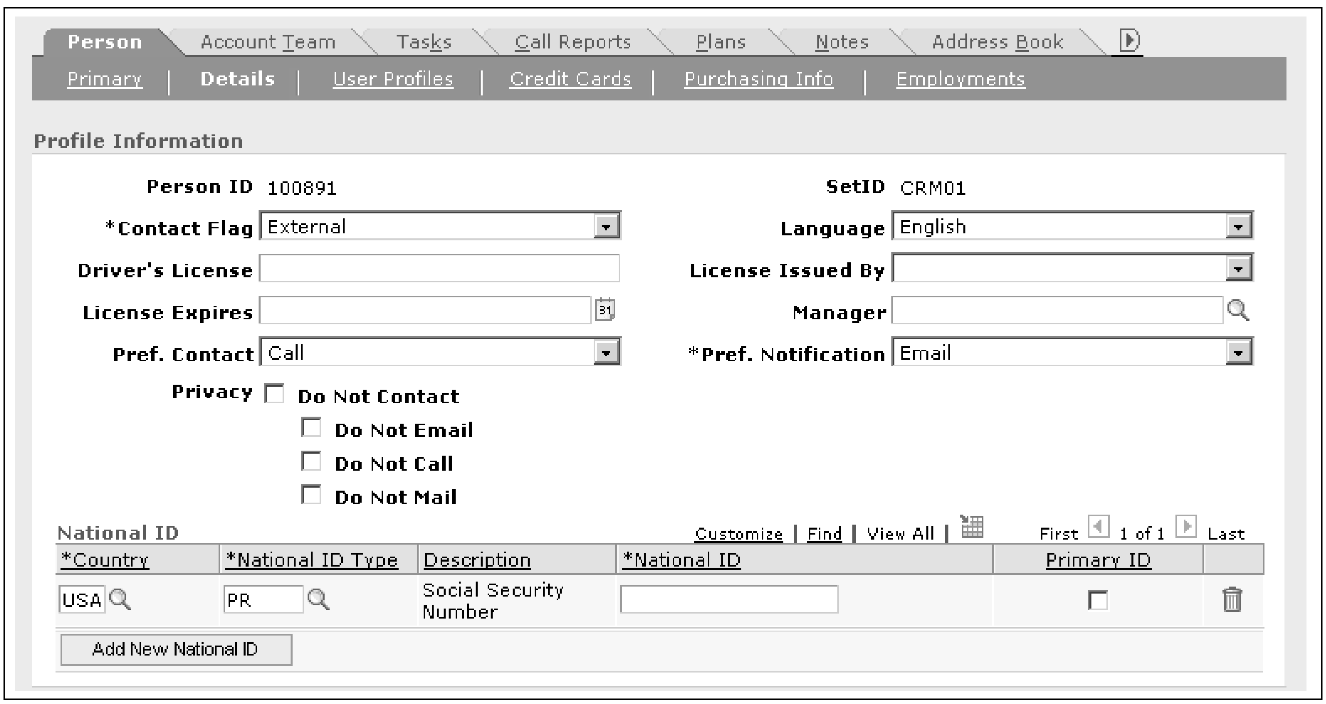
User Defined Fields

You can define up to ten fields in which to enter and store information that is useful to you. This information is stored on a separate table in the database, and is available for users that you create.

Edit User Defined Field Labels Click to enter labels for user defined fields. For example, you might change the label Field 1 to something like Name of Pet.

Viewing and Updating Person Details

Access the Person (<Role>) - Details page.



Person (Business Contact) - Details page

The example that is shown is for the Business Contact role. If you are viewing information for a person with the Consumer role, the Purchasing Options and Status and Currency Data page regions appear.

Profile Information

Privacy Select an option to indicate restrictions on avenues of contacting the person.

Purchasing Options

This page region appears only for a person with the consumer role.

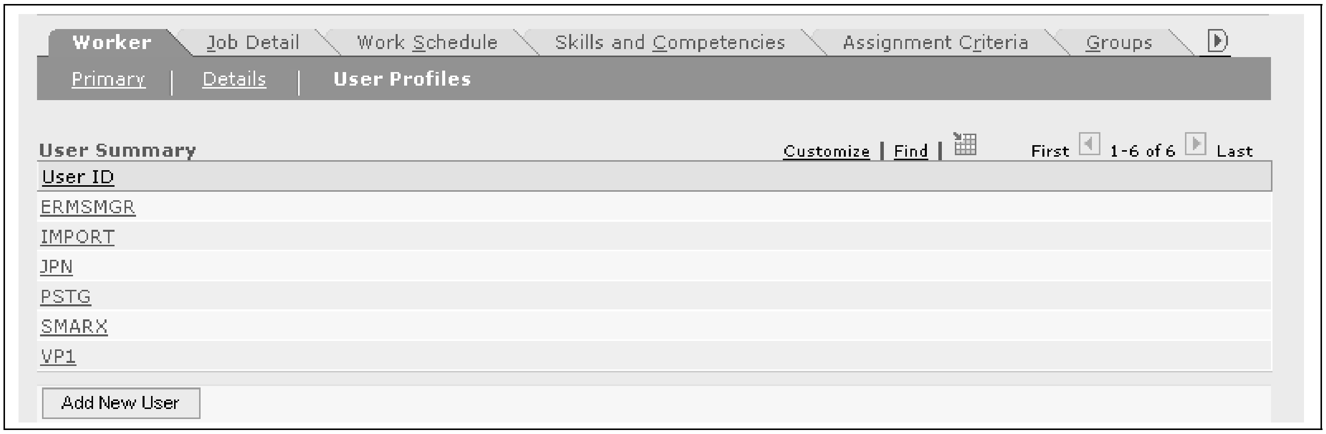
Status and Currency Data

This page region appears only for a person with the consumer role.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Setting Up Currencies”.

Maintaining User Information

Access the Person (<Role>) - User Profiles: User Summary page.



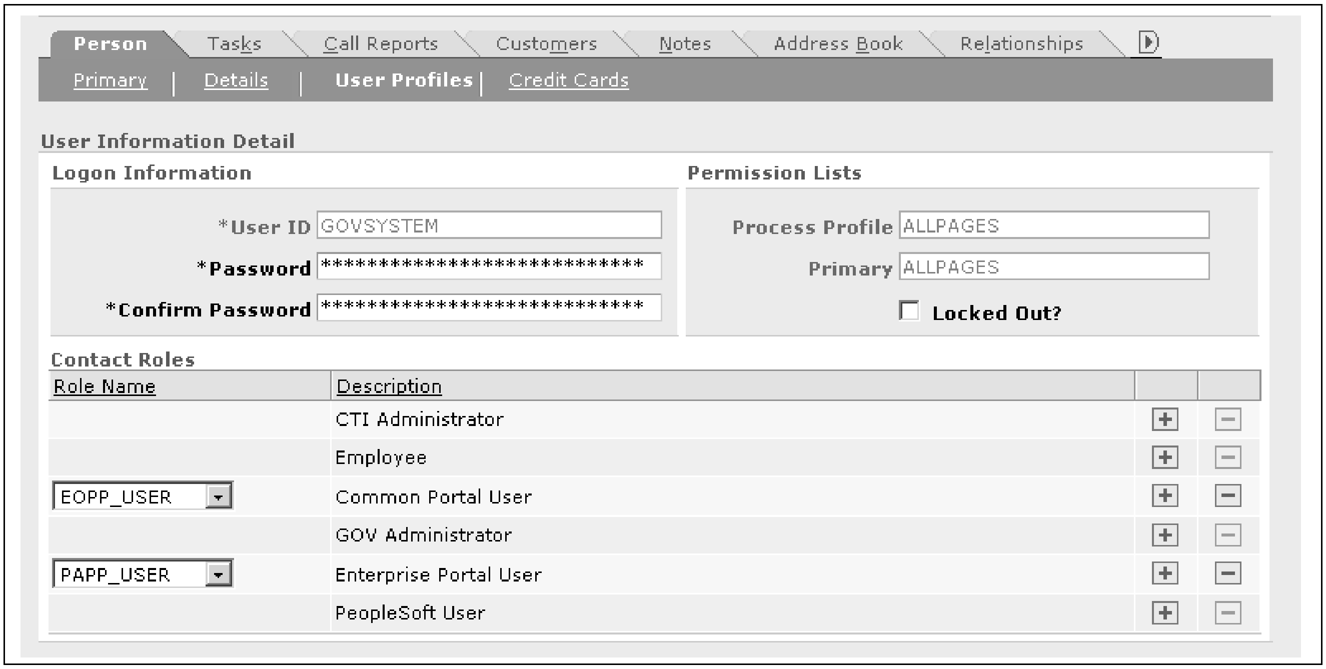
Person (<Role>) - User Profiles: User Summary page

In the User Summary page region, the user IDs that are already associated with the person appear. If no users are associated then no user information displays.

User ID	Click a user ID to access the detailed user profile information
Add New User	Click this button to add a new user. When you click this button more fields appear on the page for you to enter information about the user.

User Information Detail

Access the Person (<Role>) - User Profiles: User Information Detail page.



Person (<Role>) - User Profiles: User Information Detail page

User Information Detail

Enter user ID, password, and permission list information for the user.

Contact Roles

You can grant security roles to the person who is associated with the user ID. The Role Name field lists only roles that you have permission to grant based on your user ID.

See Also

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

Maintaining Sales Team Tasks for a Person

Access the Person (<Role>) - Tasks page.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Working with Tasks”.

Accessing Call Reports for a Person

Access the Person (<Role>) - Call Reports page.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Working with Contacts,” Working with Call Reports.

Accessing Notes and Attachments for a Person

Access the Person (<Role>) - Notes page.

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

Maintaining Contact Information for a Person

Access the Person (<Role>) - Address Book page.

See Chapter 4, “Defining Name and Address Information for Business Objects,” Maintaining Address Books for Business Objects, page 51.

Viewing and Updating Person Relationships

Access the Person (<Role>) - Relationships page.

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

Viewing and Updating Person Profile Information

Access the Person (<Role>) - More Info page.

See Chapter 6, “Working with Business Object Profiles,” page 73.

Defining Information for Business Contacts

This section lists the pages that are used to define information for business contacts.

Pages Used to Define Information for Business Contacts

Page Name	Object Name	Navigation	Usage
Person (Business Contact) - Customers	RD_PERSON_COMP	Select the Customers tab on any page in the Person (Business Contact) component.	Maintain the customers that are associated with a business contact.
Person (Business Contact) - Add Customer / Site / Purchasing Options	RD_PERSON_ADD_COMP	Click the Add Customer button on the Person (Business Contact) - Customers page.	Add customers for a contact.
Search For Customer	RBQ_BOSRCH	Search for a customer on the Person (Business Contact) - Add Customer / Site / Purchasing Options page.	Search for a customer to add for the contact.

Defining Consumer Information

This section lists the pages that are used to define consumer information and discusses how to define account teams, and address books for the consumer.

Pages Used to Define Consumer Information

Page Name	Object Name	Navigation	Usage
Person (Consumer) - Purchasing	RD_CONSUMER_BC_OPT	• Add Person Click the Purchasing link. • Select an existing person on the Person Search page. If the Purchasing link does not appear, click the Add Consumer Information link or Edit Consumer Information link, whichever appears. Click the Purchasing link.	Add purchasing options for a person.
Person (Consumer) - Employments	RD_PERSON_EMPLOY	Click the Employments link on the Person page for a person with the Consumer role.	Add a person's employment history.
Person (Consumer) - Account Team	RD_ACCOUNT_TEAM	Select the Account Team tab on any page in the Person component for a person with the Consumer role.	Define the account team that is assigned to the consumer.
Person (Consumer) - Plan	RD_ACCOUNT_PLAN	Select the Plan tab on any page in the Person component for a person with the Consumer role.	Define the account plan for the consumer.
Person (Consumer) - Address Book	RD_PRSN_ADDR_BOOKS	Select the Address Book tab from any page in the Person (Consumer) component.	Maintain addresses, contacts, and sites for a person who is a consumer.
Person (Consumer) - Contacts	RD_CONSUMER_REP	Click the Contacts link on the Address Book page for a person who is a consumer.	Maintain the contacts of a consumer.
Person (Consumer) - Sites	RD_CONSUMER_SITE_2	Click the Sites link on the Address Book page for a person who is a consumer	Maintain sites for a consumer.

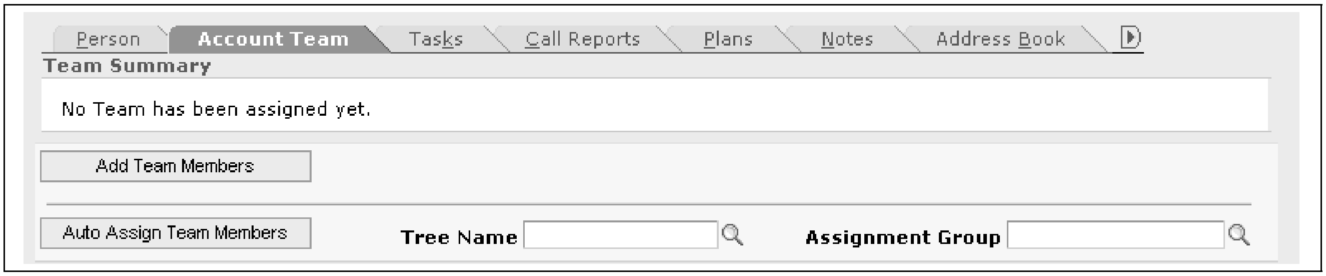
Maintaining Purchasing Options for a Person

Access the Person (Consumer) - Purchasing page.

See Chapter 5, "Defining Purchasing Options for Companies, Consumers, and Sites," page 63.

Defining Account Teams

Access the Person (Consumer) - Account Team page.



Person (Consumer) - Account Team page

You can add team members to the account team individually or automatically by using sales territory trees and assignment groups.

See *PeopleSoft Enterprise Sales 8.9 PeopleBook*, "Working with Customer Accounts," Assigning Account Representatives to a Company.

Defining Account Plans

Access the Person (Consumer) - Plan page.

This page lists the account plans that are defined for the consumer. You can click a listed plan to drill down to its detail.

See *PeopleSoft Enterprise Sales 8.9 PeopleBook*, "Working with Customer Accounts," Creating Account Plans.

Maintaining Consumer Address Books

Access the Person (Consumer) - Address Book page.

The Address Book page enables you to maintain addresses, contacts, and sites for the consumer.

See Chapter 4, "Defining Name and Address Information for Business Objects," Maintaining Address Books for Business Objects, page 51; Chapter 4, "Defining Name and Address Information for Business Objects," Defining Customer Contacts , page 57 and Chapter 4, "Defining Name and Address Information for Business Objects," Defining Customer Sites, page 61.

CHAPTER 11

Defining Workers

This chapter provides an overview of workers in PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM) and discusses how to:

- Create workers.
- Maintain worker information.
- Set up foundational data for workers.

Understanding Workers in PeopleSoft Enterprise CRM

This section discusses:

- Workforce administration.
- Options for creating workers.

Workforce Administration

Worker refers to anyone who performs work for an organization, including employees and contractors. Employees who are not part of the CRM workforce are considered CRM customers in the sense that they might call the help desk or human resources help desk for assistance with problems. This chapter focuses on maintaining the information that is necessary to administer workers who are part of the CRM workforce and to assign them to field service and support tasks.

In PeopleSoft Enterprise CRM, workers are represented as Person business objects with a role type of Worker. The Person table (RD_PERSON) contains a record for each worker, with Person ID as the key field. Attributes that are specific to the person's role as a worker, such as employee status, job location, work function, and so forth, are stored in the Worker table (RB_WORKER).

Workers are not tracked as business contacts, although you can assign the Contact role to a worker.

See Chapter 10, "Defining Person Business Objects," Viewing and Updating Primary Person Information, page 133.

Worker User Preferences and Security

Workers often have access to the PeopleSoft Enterprise CRM system to perform their functions. You can control worker access to data for system functions.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, "Setting Up PeopleSoft Customer Relationship Management Security and User Preferences," Defining Roles with Access to Sensitive Worker Information and *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, "Setting Up PeopleSoft Customer Relationship Management Security and User Preferences".

Worker Foundational Data

Worker foundational data is the control information (or prompt tables) from which you select when creating a worker. This data describes the organization infrastructure in which workers perform. You can maintain these tables in PeopleSoft Enterprise CRM or in PeopleSoft Human Resources Management (PeopleSoft HRMS) or a third-party system and move the data to PeopleSoft Enterprise CRM by implementing enterprise integration points (EIPs).

This is the worker foundational data that you must set up before creating workers:

- Job codes.

  Use the Job Code Table EIP to integrate with an HRMS system.

- Department tables.

  Use the Department Table EIP to integrate with an HRMS system.

- Locations.
- Competency information.

  Worker competency information determines which workers are best qualified for assignment to a case or service order. Use the Competency Type, Rating Model, and Competency EIPs to integrate with an HRMS system.

  See Chapter 16, "Managing Enterprise Integration for PeopleSoft Enterprise CRM ," page 269.

Navigation

PeopleSoft Enterprise CRM provides two ways to access pages that you might use when setting up worker data: the left-hand menu and the Worker Administration Center. This chapter lists the left-hand menu navigation.

See Also

PeopleSoft Enterprise Components for CRM 8.9 PeopleBook

Options for Creating Workers

After you set up the foundational data, you create workers in several ways:

- Use the Person or Worker component to create and maintain worker records in PeopleSoft Enterprise CRM.

  When you create a worker in the Worker component, the you have the options to create a new worker, copy data from an existing worker, or copy data from a template worker.

- Integrate worker data with PeopleSoft HRMS or a third-party human resources system.

  You implement the Personal Data, Workforce Data, and Person Competencies EIPs to populate the Person, Worker, and Worker Competency tables in the PeopleSoft Enterprise CRM system .

  If you integrate with human resources system that maintains worker data, do not modify the personal data, job detail, and competencies that are entered in the human resource system. You should only use the Worker pages in PeopleSoft Enterprise CRM to maintain user profiles, notes, and worker data that is used by the PeopleSoft Enterprise CRM assignment engine.

Copying Existing and Template Workers

Creating a worker by copying an existing worker or by copying a template worker are similar processes. The difference is the way in which you identify the information to copy. When you copy an existing worker, you must search through the entire Worker table to identify the worker to copy; but when you copy a template worker, you can select the worker to copy from a drop-down list box that contains only workers that are designated as template workers.

Template workers are workers whose information represents a model to use when creating other workers. You can set up dummy workers, such as CSR Level 1, as template workers. You can also identify employees that are good template workers. For example, employee John Smith is a good template worker for CSR Level 1. You designate a worker as a template worker when you enter the job detail for the worker. Whether you designate real employees or set up dummy workers for templates is an implementation consideration.

Worker Toolbar

The worker toolbar contains a Create from Current button that you can use to create a new worker from a worker whose data you are currently viewing and a Copy Data button that you can use to copy the worker's data to another worker.

See Also

Part 6, "Customer and Worker Data Integrations," page 267

Creating Workers

To create workers, use the Create Worker (RD_CREATE_WORKER) and Copy Worker (RD_COPY_WRKR_DATA) components.

This section lists prerequisites and discusses how to:

- Select the method for creating a worker.
- Select information to copy to a new worker.

Prerequisites

Before you create workers, you must set up the tables that contain information that is referred to by all workers. For example, each worker belongs to a department and has a job code. The information in these tables is called foundational data.

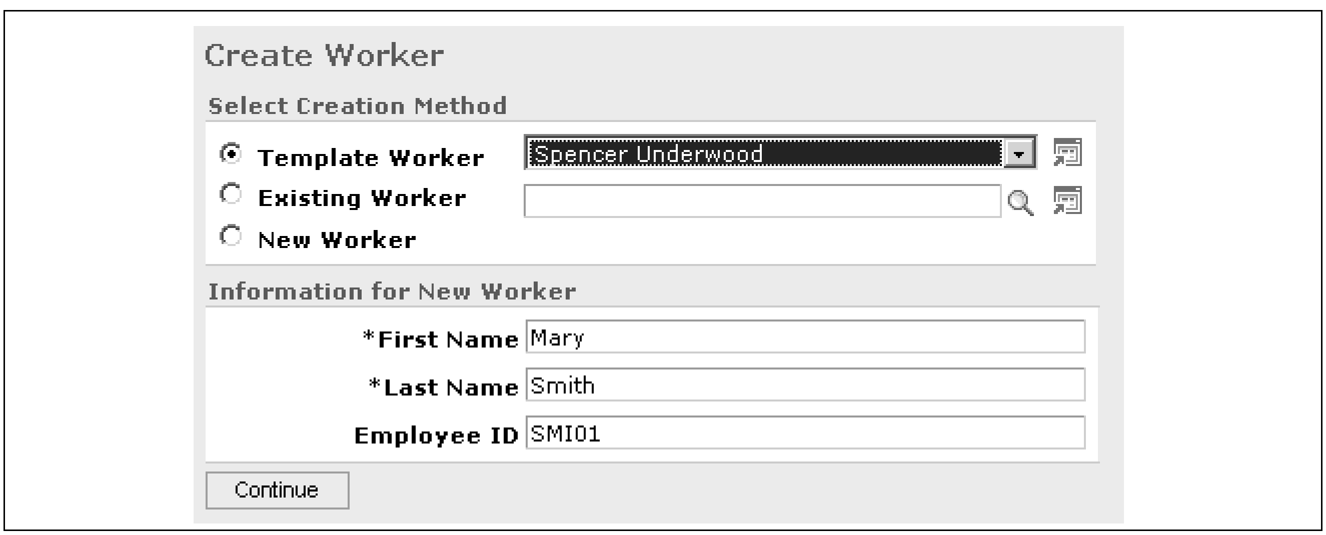
See Chapter 11, "Defining Workers," Setting Up Foundational Data for Workers, page 158.

Pages Used to Create Workers

Page Name	Object Name	Navigation	Usage
Create Worker	RD_CREATE_WORKER	Workforce, Create Worker, Create Worker	Select the method for creating a new Worker business object.
Create Worker	RD_COPY_OPTIONS	Access the Create Worker page. • Select Create from Template Worker. Enter the first and last names. Click the Continue button. • Select Create from Existing Worker. Enter the first and last names. Click the Continue button.	Select information to copy to a new worker from either a template or an existing worker.
Create Worker	RD_COPYWRKR_CONFRM	Click the Create Worker button on the second Create Worker page.	Verify that the worker information is correct.

Selecting the Method for Creating a Worker

Access the Create Worker page.



Create Worker page

Select Creation Method

Template Worker Select to create the new worker from a template worker.

Choose the template worker from the drop-down list box.

Existing Worker Select to create the new worker from an existing worker.

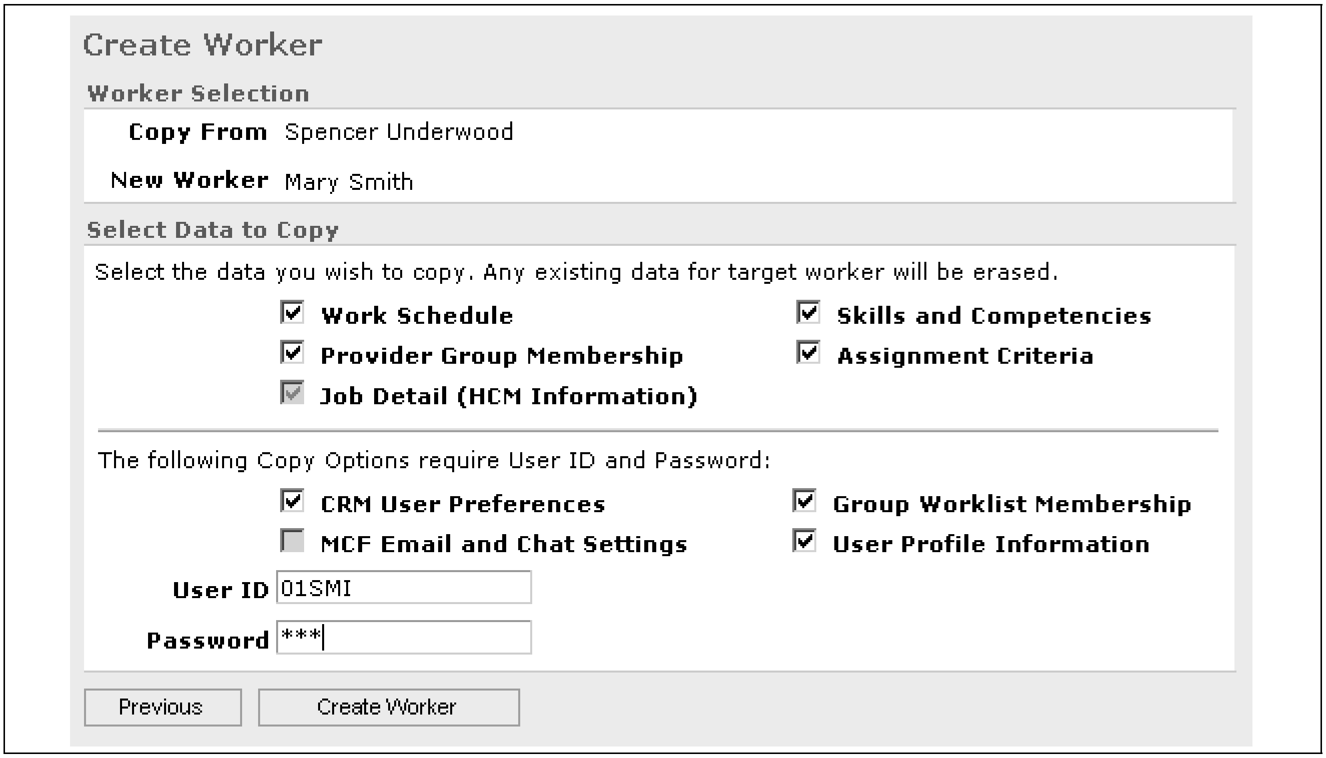
	Search for and select the worker to copy.
New Worker	Select to transfer to the Worker component and enter information for the new worker.

Information for New Worker

Enter the first and last names for the new worker, and optionally enter the employee ID.

Selecting Information to Copy to a New Worker

Access the Create Worker page.



Create Worker page

Select Data to Copy

Select the data to copy from the template worker or existing worker to the new worker. The job detail data is selected and copied by default—you cannot clear this check box.

If you select User Profile Information, CRM User Preferences, MCF Email and Chat Settings (multichannel framework email and chat settings), or Group Worklist Membership, you must enter a user ID and password for the new worker.

See Also

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

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook

Maintaining Worker Information

To maintain worker information, use the Worker (RD_WORKER_2) component.

This section discusses how to:

- Search for workers.
- View and maintain summary worker information.
- View and maintain worker details.
- View and maintain user profiles.
- Enter job information.
- Define default schedules.
- Associate competencies with workers.
- Define job assignment criteria.
- Associate workers with provider groups and worklists.
- Define default storage locations.
- Define default signatures.
- Add notes.
- View and update worker contact information.

Pages Used to Maintain Worker Information

Page Name	Object Name	Navigation	Usage
Worker	RD_WORK_GSRCH	Workforce, Search Worker	Search the database for existing workers.
Person	RD_PERSON_SEARCH	Customers CRM, Search Person	Search the database for existing persons. **Note.** To access the Worker component for a person, click the Add Worker Information or Edit Worker Information link on the Person - Summary page.
Worker - Primary	RD_PRSN_PRIMARY	• Workforce, Search Worker, Primary • Workforce, Create Worker. Enter required information on the Create Worker pages and click the Create Worker button.	View and update summary information for a worker.
Worker - Worker: Details	RD_PRSN_DETAILS	Click the Details link on the Worker - Primary page.	View and maintain worker profile information.

Page Name	Object Name	Navigation	Usage
Worker - Worker: User Profiles	RD_PERSON_USER	Click the User Profiles link on the Worker - Primary page.	Maintain the worker's user profile.
Worker - Job Detail	RD_WORKER_DETAIL	Select the Job Detail tab from any page in the Worker component.	Enter information about the specified worker's job.
Worker - Work Schedule	RD_WORKER_SCHEDULE	Select the Work Schedule tab from any page in the Worker component.	Define default workdays for the specified worker.
Worker - Skills and Competencies	RD_WORKER_CMP_PROF	Select the Skills and Competencies tab from any page in the Worker component.	Associate the specified worker with a competency and define the worker's level of proficiency for the competency.
Worker - Assignment Criteria	RD_WORKER_CRITERIA	Select the Assignment Criteria tab from any page in the Worker component.	Define criteria that the assignment engine uses to match the specified worker to a case or service order.
Groups	RD_WORKER_GROUPS	Select the Groups tab from any page in the Worker component.	Associate the worker with provider groups and group worklists.
Worker - Storage Locations	RD_WORK_STORLOC	Select the Storage Locations tab from any page in the Worker component.	Define inventory storage locations that are associated with good and defective storage locations on a field service worker's truck.
Worker - Signature	RD_WORKER_WF_SIG	Select the Signature tab from any page in the Worker component.	Define a default signature to use when the specified worker sends manual notifications.
Worker - Notes	RD_PERSON_NOTES	Select the Notes tab from any page in the Worker component.	Add notes and attachments for the specified worker.
Worker - Address Book	RD_PRSN_ADDR_BOOKS	Select the Address Book tab from any page in the Worker component.	View and update a worker's contact information.
Worker - More Info	RD_PROFILE	Select the More Info tab from any page in the Worker component.	View and update a worker's marketing profile data.

Searching for Workers

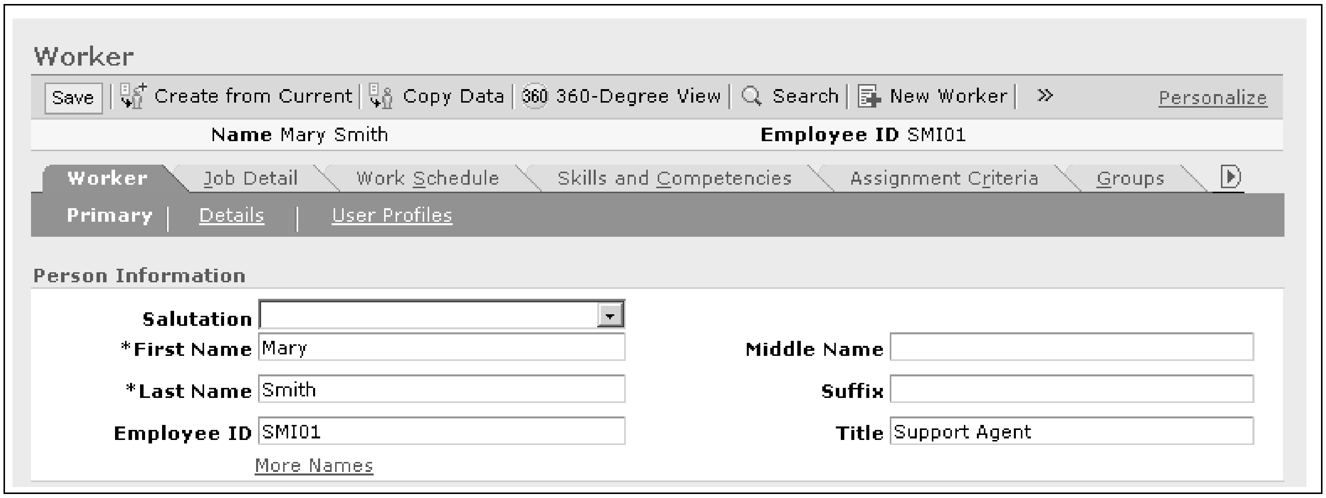
Access the Worker search page or the Person search page.

The appearance, behavior, and personalization options for this page are controlled by the search definition for the Worker and Person components, respectively.

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

Viewing and Maintaining Summary Worker Information

Access the Worker - Worker: Primary page.



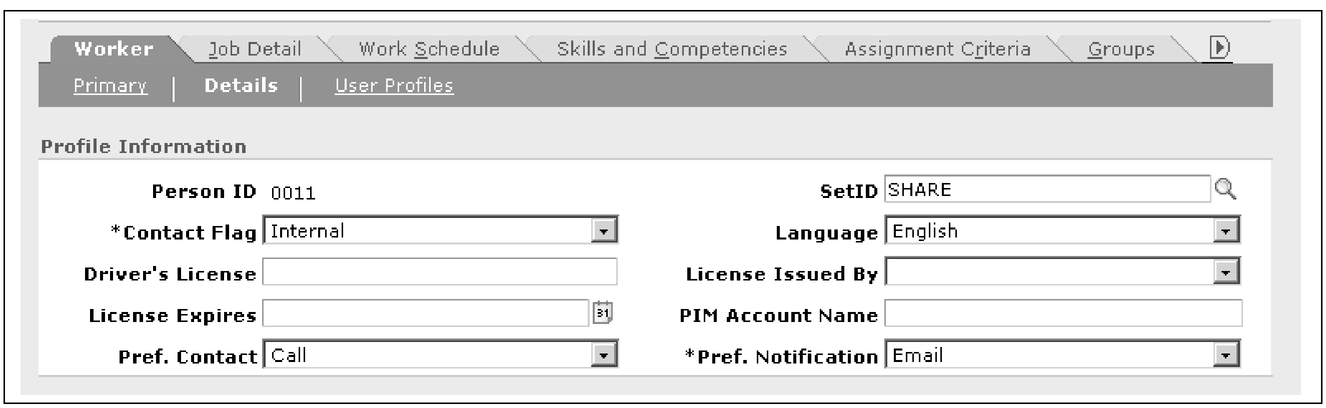
Worker - Worker: Primary page

The difference between the Worker - Primary page and the Person - Primary page is that the Employee ID appears on the Worker - Primary page and the setID does not appear. The Contact Info entries and User Defined fields on the Worker - Primary page are identical in appearance and usage to those on the Person - Primary page.

See Chapter 10, “Defining Person Business Objects,” Viewing and Updating Primary Person Information, page 133.

Viewing and Maintaining Worker Details

Access the Worker - Worker: Details page.



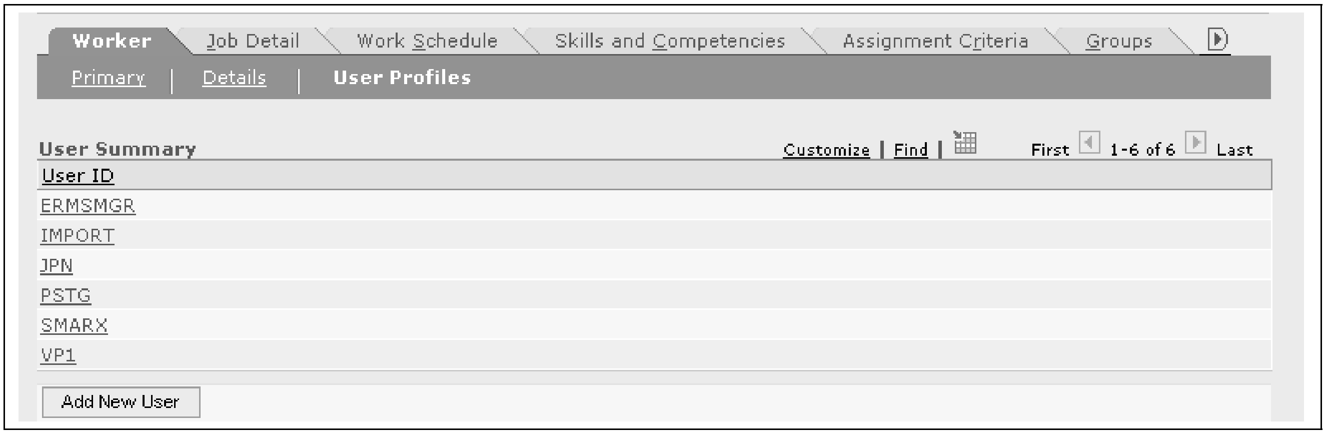
Worker - Worker: Details page

This page is similar in appearance and use to the Person - Details page, except that only the Profile Information page region appears for the Worker component.

See Chapter 10, “Defining Person Business Objects,” Viewing and Updating Primary Person Information, page 133.

Viewing and Maintaining User Profiles

Access the Worker - Worker: User Profiles page.



Worker - Worker: User Profiles page

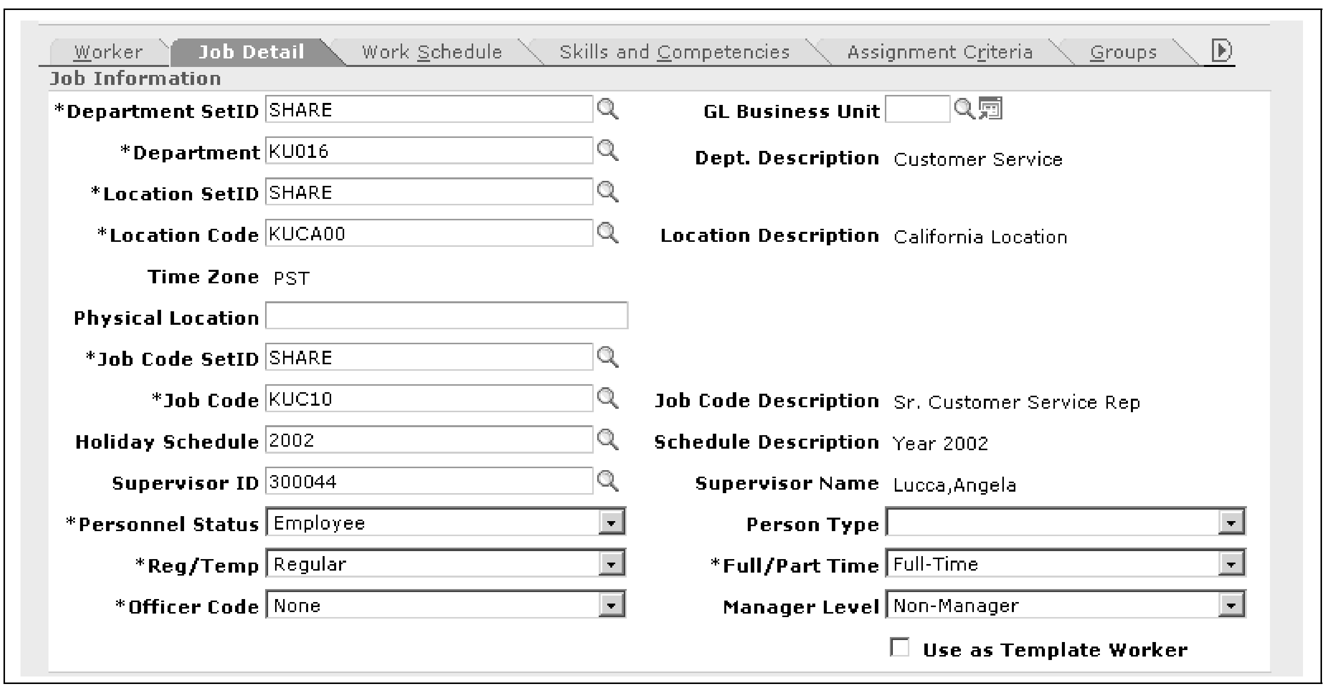
This page is similar in appearance and use to the Person - User Profiles page, except that the Additional User Setup page region appears on the detail view of the page for workers in the GBL market.

See Also

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

Entering Job Information

Access the Worker - Job Detail page.



Worker - Job Detail page

Job Information

Click this icon to initiate a business object search for the value to enter in the field next to the icon.

You can enter any information in the field before initiating the search; for example, if you know a department name begins with the word *Sales,* enter it to narrow the search.

Note. If a setID controls one of the following fields, you must enter the setID before entering or searching for a field value. The setID limits the values that are returned by the search.

Physical Location

Enter a description of the worker's physical location. You can use this field to specify locations such as an office or cubicle number.

Job Code

Select the job code that is associated with the worker's job. Job codes are established as worker foundational data.

Holiday Schedule

Select the holiday dates that are valid for this worker.

Supervisor ID

Select the supervisor to whom this worker reports.

Officer Code

Select an officer code to identify highly compensated employees for the Non-Discrimination Testing - 401(k)/401(m) report (NDT004).

Manager Level

Select the worker's management level, if applicable.

Person Type

Select the type of worker, such as *Training, Non-Employee, Temporary Worker,* or *Independent Contractor.*

Use as Template Worker

Select to make this worker's information available in the template list for creating a worker from a template.

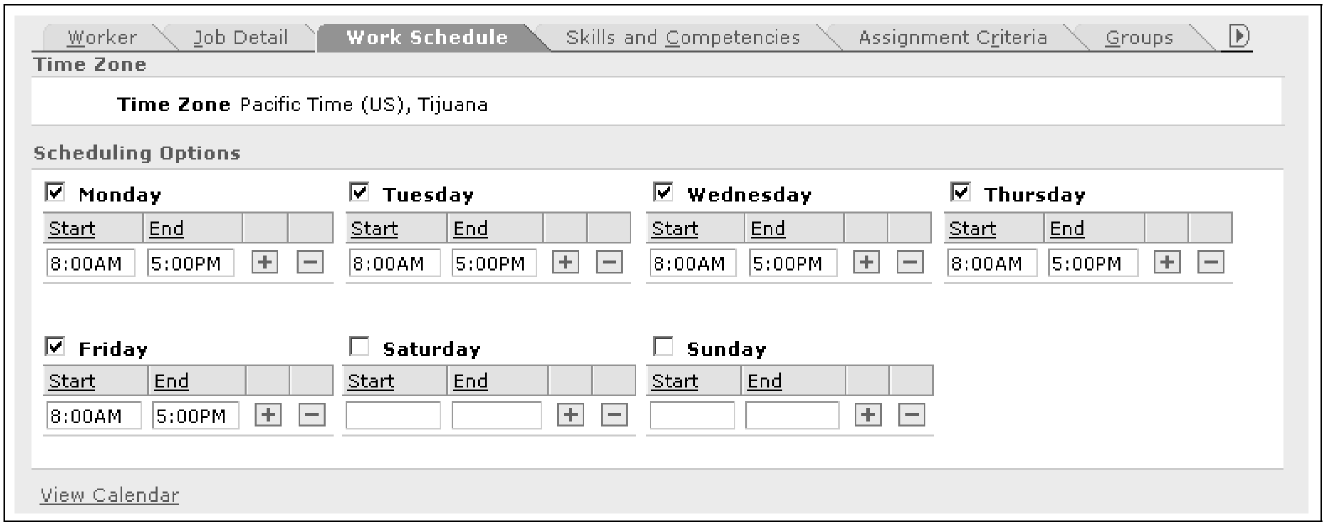
See Also

Chapter 11, "Defining Workers," Setting Up Foundational Data for Workers, page 158

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "Working with Business Units and TableSet Controls"

Defining Default Schedules

Access the Worker - Work Schedule page.



Worker - Work Schedule page

When evaluating worker availability for assignments, the system checks standard work week information that you define for the worker on this page.

Select the default work days for the specified person. The Start and End fields define the default hours of operation for the person. Enter start and end times for each work period in the day. You can enter multiple work periods to represent lunch breaks, shifts, and so forth. By default, the system populates these values with the standard work week information that you define for the installation.

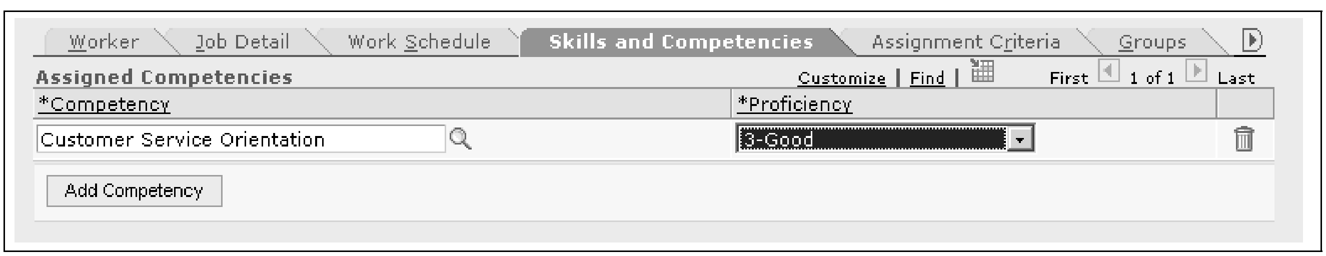
See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Setting Up and Performing Assignment Searches”

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Setting Up General Options,” Setting Calendar Options

Associating Competencies with Workers

Access the Worker - Skills and Competencies page.



Worker - Skills and Competencies page

Important! Before assigning competencies on the Worker - Skills and Competencies page in PeopleSoft Enterprise CRM, you must select the Use Only Evaluation Type installation option.

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

The Person Competency EIP loads competency data with all evaluation types into PeopleSoft Enterprise CRM. Although the evaluation type does not appear in PeopleSoft Enterprise CRM, CRM pages list only the competency records that match the specified evaluation type. If you do not specify an evaluation type during the installation, competency records for all evaluation types are available, which can degrade system performance.

Description Select a competency that is associated with the worker. In PeopleSoft Enterprise CRM, you establish competencies on the Competencies page under Set Up CRM, Common Definitions, Competencies.

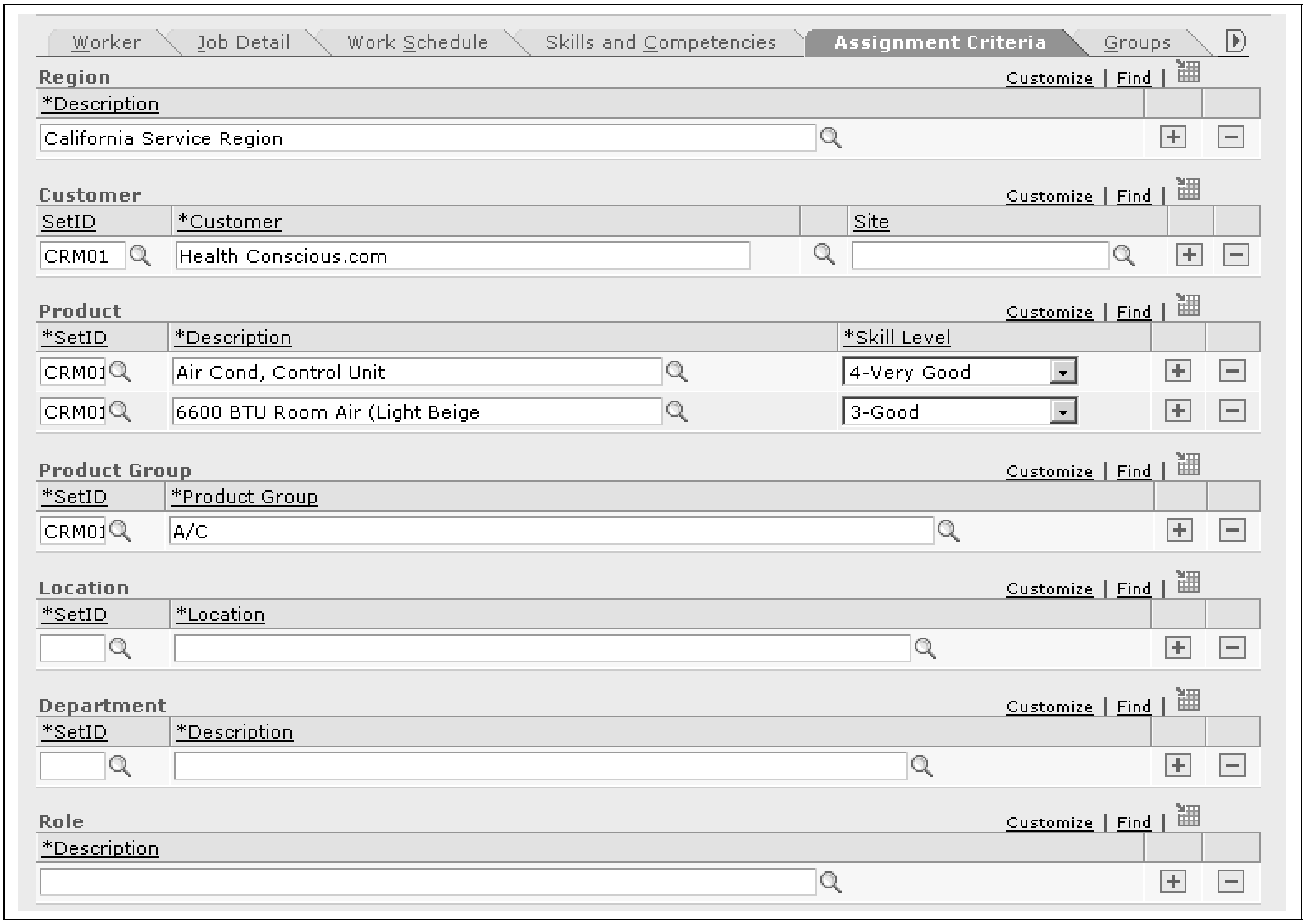
Proficiency Enter the worker's level of expertise for the competency. The rating model that is defined for the competency on the Competencies page determines the available proficiency values. In PeopleSoft FieldService, the system checks a worker's proficiency level for a competency to determine whether the worker is qualified to perform work on a service order that requires the competency. In PeopleSoft Support and PeopleSoft HelpDesk, the system checks a worker's proficiency level for a competency to determine whether the worker is qualified to perform work on a case that requires expertise in the problem type.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "Setting Up and Performing Assignment Searches"

Defining Job Assignment Criteria

Access the Worker - Assignment Criteria page.



Worker - Assignment Criteria page

The system uses the values in the Customer, Region, Product, Product Group, Location, Department, and Role fields to evaluate how suitable a worker is for assignment to the service order, case, or change request task relative to other workers in the provider group.

When you perform an assignment search from a case, service order, or change request task, the assignment engine calculates a point value for each criteria value on the service order, case, or change request task that the worker matches based on the weight, or relative importance, of the match. The sum of the point values divided by the total possible points for the service order or case becomes the worker's fit score. Failure to match individual criteria lowers the worker's total fit score but does not exclude the worker from the list of suggested assignment candidates. Failure to match any criteria excludes the worker from the suggested candidates.

The assignment engine uses a different set of assignment criteria values for cases in PeopleSoft HelpDesk, cases in PeopleSoft Support, service orders in PeopleSoft FieldService, or tasks in PeopleSoft Change Management. For help desk cases, the assignment engine matches values for location, product, and product group. For both support cases and service orders, the assignment engine matches values for customer, site, region, product, and product group. For tasks in Change Management, the assignment engine matches values for location, department, either product or product group, and role.

Region

Enter the worker's region. The assignment engine matches the worker's region to the region on the service order or case.

Customer

If the worker can support the customer at any site, enter the customer and leave the Site field blank. You can also select a site without specifying a customer.

Product

The values for the Proficiency field depend on the product rating model that you specify for the setID when you set up the assignment engine.

Product Group

Enter the product groups that the worker supports and the setIDs of the product groups.

Location

Enter the worker's location and the location setID. The assignment engine matches the worker's location for change management tasks.

Department

Enter the worker's department and setID of the department.

Role

Enter the description of the worker's role. This is used to assign change management tasks to workers.

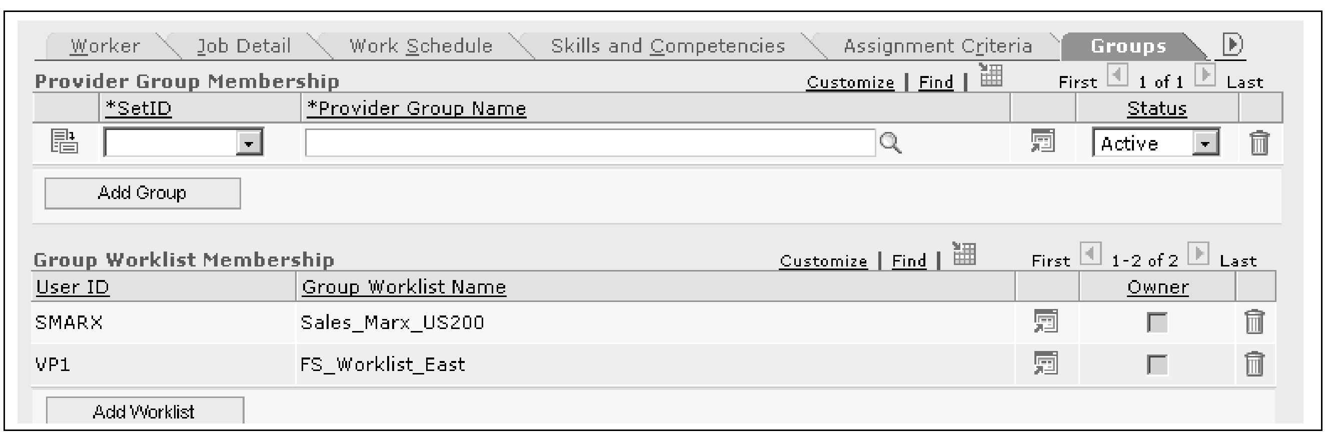
See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "Setting Up and Performing Assignment Searches"

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "Setting Up and Performing Assignment Searches," Reviewing and Assigning Group Members

Associating Workers with Provider Groups

Access the Worker - Groups page.



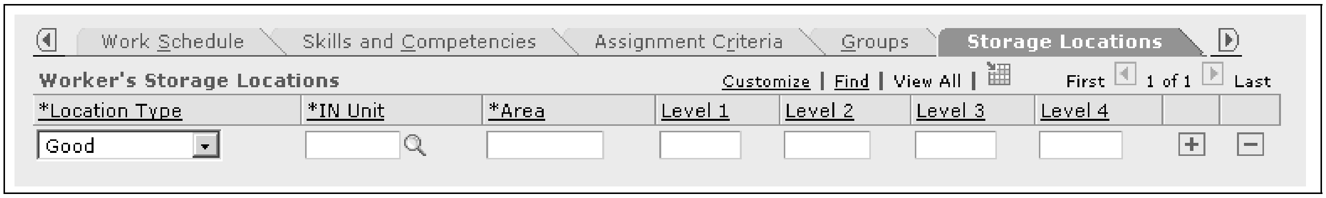
Worker - Groups page

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "Setting Up and Maintaining Provider Groups and Group Members"

Defining Default Storage Locations

Access the Worker - Storage Locations page.



Worker - Storage Locations page

Storage location information is required only for workers who perform field service activities. Material movement transactions that are initiated from the Manage Material page in PeopleSoft FieldService update quantities in the inventory storage locations that are associated with the lead technician on the service order line.

You must define one and only one good truck stock location and one and only one defective truck stock location for each field service worker. The good and defective locations can't have the same storage location definition—the area and up to four storage levels—in PeopleSoft Inventory or a third-party inventory system.

Location Type

Select the type of material location that is on the truck.

Good: The location for material that is used to complete a service request at a customer's site.

Defective: The location of material that was removed from a customer's site. Typically, the worker returns this stock to the central distribution center for inspection or scrap processing.

IN Unit (inventory unit)

Enter the identification of the inventory business unit with the material storage location that corresponds to the material location type that is on the worker's truck. You define the inventory business unit in PeopleSoft Inventory or a third-party inventory system and insert it in the PeopleSoft Enterprise CRM system by using the Business Unit EIP.

See Chapter 16, "Managing Enterprise Integration for PeopleSoft Enterprise CRM ," page 269.

Area, Level 1, Level 2, Level 3, and **Level 4**

Enter the material storage area in PeopleSoft Inventory or a third-party inventory system that corresponds to the material location type that is on the worker's truck. You can define a storage location address in an inventory system by using a storage area and up to four levels representing a physical subdivision of the storage area, such as aisles, rows, shelves, and bins.

Important! There are no prompts for the storage location definition fields: Area, Level 1, Level 2, Level 3, and Level 4. Unlike business units, storage location information is not synchronized with an inventory system. You must know the correct storage location definitions to enter. Material movement transactions that are initiated from the Manage Material page are successfully recorded in the inventory system only if the storage location definition that you enter is a valid storage location for the inventory business unit that is referenced in the IN Unit field.

See Also

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, “Understanding Inventory Storage Locations for Technicians”

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, “Ordering and Receiving Materials”

PeopleSoft Inventory 8.8 PeopleBook

Defining Default Signatures

Access the Worker - Signature page.

In the Notification Signature field, enter the default signature that is used when sending manual notifications. When this person accesses the Send Notification page, this signature appears in the Message field.

Adding Notes

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

Viewing and Updating Worker Contact Information

Access the Worker - Address Book page.

See Chapter 4, “Defining Name and Address Information for Business Objects,” Maintaining Address Books for Business Objects, page 51.

Setting Up Foundational Data for Workers

To set up foundational data for workers, use the Location (LOCATION_TBL), Department (DEPARTMENT), Job Code (RB_JOB_CODE), and Cost Category (RF_COST_CAT) components.

This section discusses how to:

- Set up worker locations.
- Set up department codes.
- Set up job codes.
- Set up cost categories.
- Set up competencies.

Note. In addition to worker-specific foundational data, worker records also reference general foundational data, such as setIDs, location codes, and salutation codes. For more information, refer to the table-loading sequence for the PeopleSoft Enterprise CRM application. You can find table-loading sequences for each product on the PeopleSoft Customer Connection website.

See Also

Chapter 16, “Managing Enterprise Integration for PeopleSoft Enterprise CRM ,” page 269

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Managing Workforce Competencies”

PeopleSoft Enterprise Components for CRM 8.9 PeopleBook

Pages Used to Set Up Foundational Data for Workers

Page Name	Object Name	Navigation	Usage
Location	LOCATION_TBL	Set Up CRM, Common Definitions, Location, Location.	Set up location codes.
Department	DEPARTMENT	Set Up CRM, Common Definitions, Employee Data, Department, Department	Set up information about the organization’s departments.
Job Codes	RB_JOB_CODE	Set Up CRM, Common Definitions, Employee Data, Job Codes, Job Codes	Set up codes for the jobs in the organization.
Cost Categories	RF_COST_CAT	Set Up CRM, Common Definitions, Employee Data, Cost Categories, Cost Categories	Set up cost categories.
Worker Functions	RD_WRK_FUNC_TBL	Set Up CRM, Common Definitions, Employee Data, Worker Functions, Worker Function	Set up worker functions.
Competencies	COMPETENCY_TABLE	Set Up CRM, Common Definitions, Competencies, Competencies, Competencies	Set up competencies.

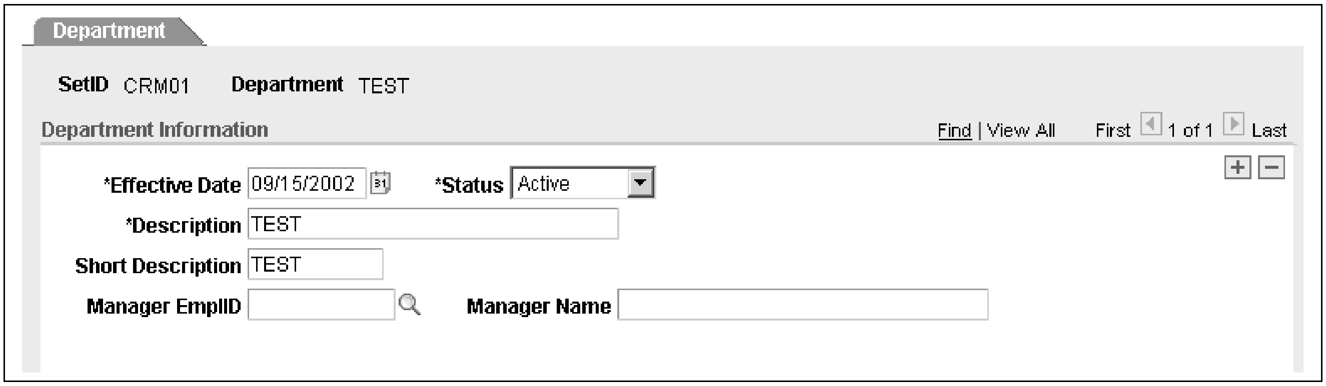
Setting Up Location Codes

Access the Location page.

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

Setting Up Department Codes

Access the Department page.



Department page

Note. Instead of entering information directly into PeopleSoft Enterprise CRM, you can maintain department codes in PeopleSoft HRMS or a third-party system and move the department data to PeopleSoft Enterprise CRM by implementing the Department Table EIP.

Setting Up Job Codes

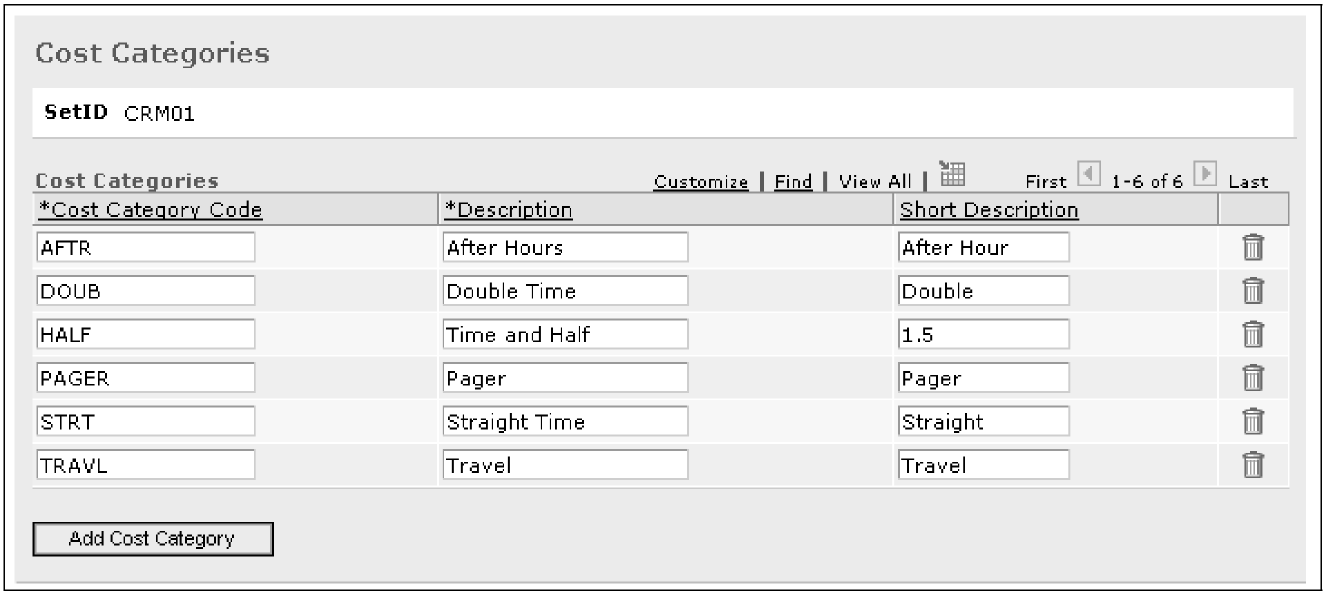
Access the Job Codes page.

Job Codes page

You can also maintain job codes in PeopleSoft HRMS or a third-party system and move the job code data to PeopleSoft Enterprise CRM by implementing the Job Code Table EIP.

Setting Up Cost Categories

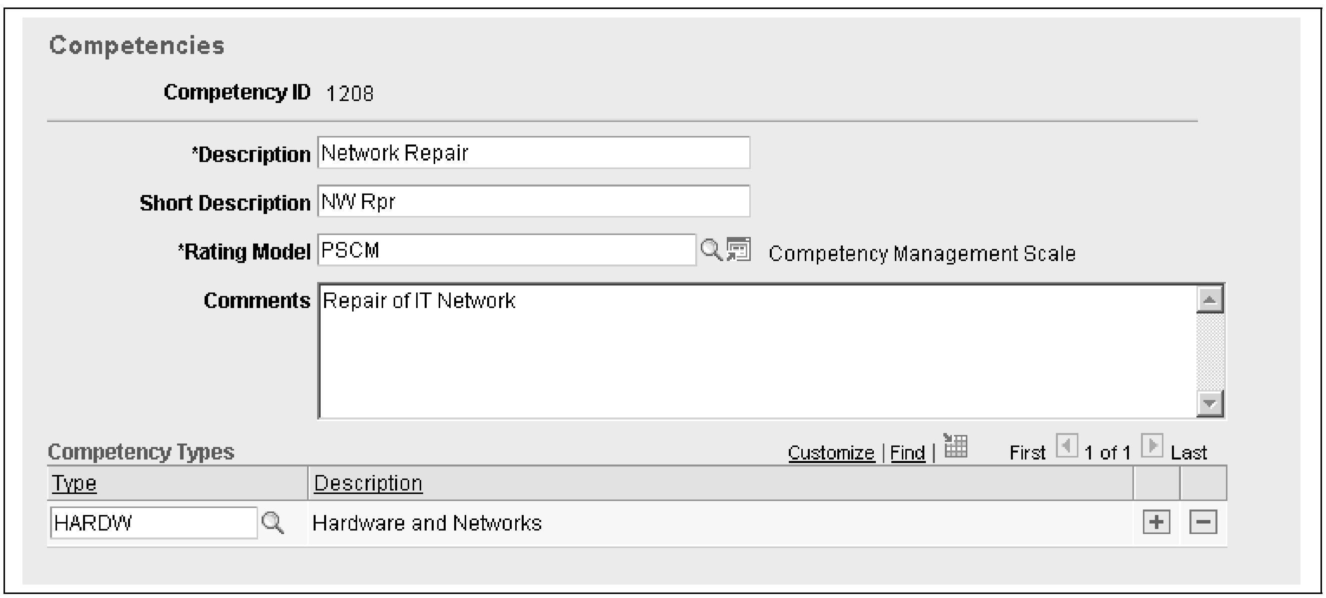
Access the Cost Categories page.



Cost Categories page

Setting Up Competencies

Access the Competencies page.



Competencies page

Worker competency information determines which workers are best qualified for assignment to a case or service order. PeopleSoft Enterprise CRM enables you to define competency information and associate it with workers by using competency codes. You can also maintain competency data in PeopleSoft HRMS or a third-party system and move the competency data to PeopleSoft Enterprise CRM by implementing the following EIPs: Competency Type, Rating Model, and Competency.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Managing Workforce Competencies”.

PART 5

Business Object Management

CHAPTER 12

Working with Predefined Business Object Search and Quick Create Data

This chapter discusses the predefined system data that is used by the business object (BO) search and quick create process.

Understanding Delivered System Data for BO Search and Quick Create

This section discusses the following delivered system data:

- Field definitions.
- Quick create templates.
- Quick create definitions.
- Search roles.
- Search definitions.
- Search criteria.
- Adapter definitions.

Delivered System Data

PeopleSoft Enterprise CRM delivers system data for business object searches and quick create definitions that are delivered as part of the PeopleSoft Enterprise CRM suite of products. Before defining new searches or quick create definitions, examine the delivered system data to fully understand the setup requirements.

See Chapter 14, “Setting Up Business Object Search and Quick Create,” Understanding BO Search and Quick Create Setup, page 245.

Field Definitions

This section provides a summary list of the fields that are provided by PeopleSoft Enterprise CRM. For more detail on how a field is defined in the system, access the Field page and search for the field description.

See Chapter 14, “Setting Up Business Object Search and Quick Create,” Defining Fields, page 249.

Field Description	Field Name	Role Types
Account	RBTACCTNO	• Contact (8) • Individual Consumer (9) • Account Owner (Individual) (65) • Account Owner (Organization) (66) • Account Owner (Rep.) (67) • Client (20012)
Account ID	RBTACCTID	• Contact (8) • Individual Consumer (9) • Sold To Organization (42) • Sold To Individual (46) • Account Owner (Individual) (65) • Account Owner (Organization) (66) • Account Owner (Rep.) (67) • Client (20012)
Address Address 1	CO_CONCAT ADDRESS 1	• Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Partner (11) • Partnership (30) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47)
AGREEMENT ID	AGREEMENT_CODE	• Company (2) • Contact (8) • Individual Consumer (9)
ATM Card	ATM_CARD_NO	• Contact (8) • Individual Consumer (9) • Competitor (10)

Field Description	Field Name	Role Types
Birthday	BIRTHDATE	• Contact (8) • Individual Consumer (9)
City	CITY	• Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Partner (11) • Partnership (30) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47)
Company ID	COMPANYID	Partner (11)
Country	COUNTRY	• Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Partner (11) • Partnership (30) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47)

Field Description	Field Name	Role Types
Currency	CURRENCY_CD	• Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Partner (11) • Partnership (30) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47)
Customer ID	CUST_ID	• Company (2) • Individual Consumer (9) • Partner (11)
Department	DEPTID	Worker (4)
Department Name	DESCR	Worker (4)
Department Set ID	SETID_DEPT	Worker (4)
Email	CM_CONCAT	• Worker (4) • Contact (8)) • Individual Consumer (9 • Account Owner (Individual) (65) • Account Owner (Rep.) (67)
Employee ID	EMPLID	Worker (4)
Extension	EXTENSION	Worker (4)
Financial Account	FIN_ACCOUNT_ID	• Contact (8) • Individual Consumer (9)

Field Description	Field Name	Role Types
First Name	FIRST_NAME	• Worker (4) • Contact (8) • Individual Consumer (9) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47)
Job Code	JOBCODE	Worker (4)
Job Code Set ID	SETID_JOBCODE	Worker (4)
Last Name	LAST_NAME	• Worker (4) • Contact (8) • Individual Consumer (9) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47)
Location	LOCATION	Worker
Location Name	RC_LOC_DESCR	Worker
Location Set ID	SETID_LOCATION	Worker
Name	BO_NAME_DISPLAY	• Person (1) • Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Partner (11) • Partnership (30) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47) • Organization (20008)

Field Description	Field Name	Role Types
National ID	NATIONAL_ID	Worker (4)
Phone	CM_CONCAT	• Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Partner (11) • Partnership (30) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47)
Physical Location	PHYSICAL_LOCATION	Worker (4)
PIN	PERSON_PIN	• Contact (8) • Individual Consumer (9)
Postal	POSTAL	• Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Partner (11) • Partnership (30) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47)

Field Description	Field Name	Role Types
Serial Number	SERIAL_ID	• Company (2) • Contact (8) • Individual Consumer (9)
Service Phone	RBTPHONENUMBER	• Contact (8) • Individual Consumer (9)
SIN	SIN	• Company (2) • Site (3) • Individual Consumer (9)
Site ID	SITE_ID	Site (3)
SSN/TIN	TIN	• Company (2) • Site (3) • Contact (8) • Individual Consumer (9) • Partnership (30) • Alternate Capacity (31)
State	STATE	• Company (2) • Site (3) • Worker (4) • Contact (8) • Individual Consumer (9) • Partner (11) • Partnership (30) • Alternate Capacity (31) • Ship To Organization (41) • Sold To Organization (42) • Bill To Organization (43) • Ship To Individual (45) • Sold To Individual (46) • Bill To Individual (47)

Field Description	Field Name	Role Types
Suffix	NAME_SUFFIX	Worker (4) Contact (8) Individual Consumer (9) Ship To Individual (45) Sold To Individual (46) Bill To Individual (47)
TIN Type	TINTYPE	• Company (2) • Site (3) • Contact (8) • Individual Consumer (9) • Partner (11) • Partnership (30) • Alternate Capacity (31)

Quick Create Definitions and Templates

This section provides a summary list of the quick create definitions and quick create templates that are provided by PeopleSoft Enterprise CRM. For more detail on a quick create definition or quick create template, access the Quick Create or Quick Create Template page and search for the quick create definition or quick create template definition.

See Chapter 14, “Setting Up Business Object Search and Quick Create,” Defining Quick Create Templates, page 252 and Chapter 14, “Setting Up Business Object Search and Quick Create,” Setting Up Quick Create Definitions, page 254.

Quick Create Definition	Quick Create Template
RBW Client	RBW Client
RC FSI Contact	RC FSI Consumer
	RC FSI Consumer with Contact
	The Company with Contact
	The FSI Alt Capacity with Cont
	The FSI Partnership with Cont

Quick Create Definition	Quick Create Template
RC Person	The Company with Contact
	The Consumer
	The Consumer with Contact
RSF Company	The Company (BC)
RSF Consumer	The Consumer (BC)
The Bill To Company	The Bill To Company
The Bill To Company and Cont	The Bill To Company
	The Bill To Company with Cont
The Bill To Company with Cont	The Bill To Company with Cont
The Bill To Consumer	The Bill To Consumer
The Bill To Consumer and Cont	The Bill To Consumer
	The Bill To Consumer with Cont
The Bill To Consumer with Cont	The Bill To Consumer with Cont
The Bill To Customer	The Bill To Company
	The Bill To Consumer
The Bill To Customer and Cont	The Bill To Company
	The Bill To Company with Cont
	The Bill To Consumer
	The Bill To Consumer with Cont
The Bill To Customer with Cont	The Bill To Company with Cont
	The Bill to Consumer
	The Bill To Consumer with Cont
The Company	The Company
The Company and Contact	The Company
	The Company with Contact

Quick Create Definition	Quick Create Template
The Company and Site	The Company
	The Company with Site (BC)
	The Site (ENG)
The Company with Contact	The Company with Contact
The Company with Site	The Company with Site (BC)
The Consumer	The Consumer
The Consumer and Contact	The Consumer
	The Consumer with Contact
The Consumer with Contact	The Consumer with Contact
The Consumer with Site	The Company with Site (BC)
The Customer	The Company
	The Consumer
The Customer and Contact	The Company
	The Company with Contact
	The Consumer
	The Consumer with Contact
The Customer with Contact	The Company with Contact
	The Consumer
	The Consumer with Contact
The Customer with Site	The Company with Site (BC)
	The Consumer with Site (BC)
The FSI Alt Capacity	The FSI Alt Capacity
The FSI Alt Capacity with Cont	The FSI Alt Capacity with Cont
The FSI Company	The FSI Company
The FSI Company and Contact	The FSI Company
	The FSI Company with Contact
The FSI Company with Contact	The FSI Company with Contact

Quick Create Definition	Quick Create Template
The FSI Consumer	The FSI Consumer
The FSI Consumer and Contact	The FSI Consumer
	The FSI Consumer with Contact
The FSI Consumer with Contact	The FSI Consumer with Contact
The FSI Cust (Org) and Cont	The FSI Alt Capacity
	The FSI Alt Capacity with Cont
	The FSI Company
	The FSI Company with Contact
	The FSI Consumer
	The FSI Consumer with Contact
	The FSI Partnership
	The FSI Partnership with Cont
The FSI Cust (Org) with Cont	The FSI Alt Capacity with Cont
	The FSI Company with Contact
	The FSI Consumer
	The FSI Consumer with Contact
	The FSI Partnership with Cont
The FSI Customer	The FSI Alt Capacity
	The FSI Company
	The FSI Partnership
The FSI Partnership	The FSI Partnership
The FSI Partnership with Cont	The FSI Partnership with Cont
The FSI Site with Contact	The FSI Site with Contact

Quick Create Definition	Quick Create Template
The OC Sold-To Cust and Contact	The Company with Site (BC)
	The Sold To Company
	The Sold To Company with Cont
	The Sold To Consumer
	The Sold To Consumer with Cont
The Ship To Company	The Ship To Company
The Ship To Company and Cont	The Ship To Company
	The Ship To Company with Cont
The Ship To Company with Cont	The Ship To Company with Cont
The Ship To Consumer	The Ship To Consumer
The Ship To Consumer and Cont	The Ship To Consumer
	The Ship To Consumer with Cont
The Ship To Consumer with Cont	The Ship To Consumer with Cont
The Ship To Customer	The Ship To Company
	The Ship To Consumer
The Ship To Customer and Cont	The Ship To Company
	The Ship To Company with Cont
	The Ship To Consumer
	The Ship To Consumer with Cont
The Ship To Customer with Cont	The Ship To Company with Cont
	The Ship To Consumer
	The Ship To Consumer with Cont
The Site	The Site(ENG)
The Site with Contact	The Site with Contact
The Sold To Co. with Cont/Site	The Sold To Company
	The Sold To Company with Cont
	The Sold To Company with Site

Quick Create Definition	Quick Create Template
The Sold To Company	The Sold To Company
The Sold To Company and Cont	The Sold To Company
	The Sold To Company with Cont
The Sold To Company with Cont	The Sold To Company with Cont
The Sold To Company with Site	The Sold To Company
	The Sold To Company with Site
The Sold To Cons with Con/Site	The Sold To Consumer
	The Sold To Consumer with Cont
	The Sold To Consumer with Site
The Sold To Consumer	The Sold To Consumer
The Sold To Consumer and Cont	The Sold To Consumer
	The Sold To Consumer with Cont
The Sold To Consumer with Cont	The Sold To Consumer with Cont
The Sold To Customer	The Sold To Company
	The Sold To Consumer
The Sold To Customer and Cont	The Sold To Company
	The Sold To Company with Cont
	The Sold To Consumer
	The Sold To Consumer with Cont
The Sold To Customer with Cont	The Sold To Company with Cont
	The Sold To Consumer
	The Sold To Consumer with Cont
The Worker	The Worker

Search Roles

This section provides a summary list of the search roles that are provided by PeopleSoft Enterprise CRM. For more detail on how a search role is defined in the system, access the Search Role page and search for the role.

See Chapter 14, “Setting Up Business Object Search and Quick Create,” Viewing Roles that Use a Search Field, page 251 and Chapter 14, “Setting Up Business Object Search and Quick Create,” Associating Search Fields with a Role Type, page 254.

- 360 (COM) Company
- 360 (COM) Consumer
- 360 (COM) Cont of Company
- 360 (COM) Cont of Consumer
- 360 (ENG) Company
- 360 (ENG) Consumer
- 360 (ENG) Cont of Company
- 360 (ENG) Cont of Consumer
- 360 (FSI) Alternate Capacity
- 360 (FSI) Company
- 360 (FSI) Consumer
- 360 (FSI) Cont of Company
- 360 (FSI) Cont of Consumer
- 360 (FSI) Cont of Partnership
- 360 (FSI) Cont of Alt Cap
- 360 (FSI) Partnership
- 360 (GBL) Company
- 360 (GBL) Consumer
- 360 (GBL) Cont of Company
- 360 (GBL) Cont of Consumer
- 360 (GBL) Cont of Site
- 360 (GBL) Site
- 360 (INS) Consumer
- 360 (INS) Cont of Company
- 360 (INS) Cont of Consumer
- 360 Partner
- CDM Bill To Organization
- CDM Consumer with Cust ID
- CDM Contact
- CDM Ship To Organization
- CDM Worker
- FS Company
- FS Consumer
- OC (COM/ENG) Company

- OC (COM/ENG) Consumer
- OC (COM/ENG) Cont of Sld To Co
- OC (COM/ENG) Cont of SldTo Con
- OC (COM/ENG) Sold To Co w/Prim
- OC (COM/ENG) Sold To Con
- OC Sold To Company
- RA Contact
- RA Worker (N)
- RB Recipient
- RB Representing
- RB Sender
- RC COM Consumer
- RC COM Contact of Company
- RC COM Contact of Consumer
- RC Company
- RC Company Site
- RC Consumer
- RC Consumer Site
- RC Consumer with PIN
- RC Contact (D)
- RC Contact of Alt. Capacity
- RC Contact of Company
- RC Contact of Company with PIN
- RC Contact of Consumer
- RC Contact of Consumer with PIN
- RC Contact of Partnership
- RC Contact of Site
- RC FSI Consumer
- RC FSI Contact of Company
- RC FSI Contact of Consumer
- RC Site of Company
- RC Worker
- RC Worker Helpdesk
- RG Contact (N)
- RG Worker (N)
- RO Site

- RQ Contact (N)
- RQ Worker (N)
- RSF Client
- RSF Consumer
- RSF Contact
- RSF Contact of Company
- RSF Contact of Consumer
- RSF Partner
- RSF Worker (sales Rep)
- RV Account Owner (Ind)
- RV Account Owner (Org)
- RV Account Owner (Rep)
- RV Account Owner Company
- RV Account Owner Partnership
- RV Account Owner Person
- The Account
- The Account with Bill To (D)
- The Alt Capacity
- The Alt Capacity with Cust ID
- The Alt Capacity with Primary
- The Bill To Comp with Primary
- The Bill To Company
- The Bill To Cons with Primary
- The Bill To Consumer
- The Bill To Consumer (N)
- The Bill To Site
- The Company
- The Company of Contact (DN)
- The Company with Cust ID
- The Company with Primary
- The Consumer
- The Consumer (D)
- The Consumer (N)
- The Consumer of Contact (DN)
- The Consumer with Cust ID
- The Contact

- The Contact of Account
- The Contact of Alt Cap
- The Contact of Alt Cap (D)
- The Contact of Bill To Comp
- The Contact of Bill To Comp (D)
- The Contact of Bill To Cons
- The Contact of Bill To Cons(D)
- The Contact of Company
- The Contact of Company (D)
- The Contact of Company (ND)
- The Contact of Company (NS)
- The Contact of Consumer
- The Contact of Consumer (D)
- The Contact of Consumer (ND)
- The Contact of Consumer (NS)
- The Contact of Partner
- The Contact of Partner (D)
- The Contact of Partner (ND)
- The Contact of Partner (NS)
- The Contact of Partnership
- The Contact of Partnership(D)
- The Contact of Ship To Comp
- The Contact of Ship To Comp(D)
- The Contact of Ship To Cons
- The Contact of Ship To Cons(D)
- The Contact of Site
- The Contact of Site (D)
- The Contact of Sold To Comp
- The Contact of Sold To Comp(D)
- The Contact of Sold To Cons
- The Contact of Sold To Cons(D)
- The Partner
- The Partner of Contact (DN)
- The Partner with Company ID
- The Partner with Primary
- The Partnership

- The Partnership with Cust ID
- The Person
- The Ship To Comp with Primary
- The Ship To Company
- The Ship To Cons with Primary
- The Ship To Consumer
- The Ship To Consumer (N)
- The Ship To Site
- The Site
- The Site of Company
- The Site of Consumer (N)
- The Site with Primary
- The Site with Site ID
- The Sold To Comp with Primary
- The Sold To Company
- The Sold To Cons with Primary
- The Sold To Consumer
- The Sold To Consumer (N)
- The Sold To Site
- The Worker
- The Worker (S Name)
- WN Consumer

Search Definitions

This section provides a summary list of the search definitions that are provided by PeopleSoft Enterprise CRM. For more detail on how a search is defined in the system, access the Search page and search for the search definition that is listed below.

See Chapter 14, "Setting Up Business Object Search and Quick Create," Defining BO Searches, page 257.

- 360 BO all details (COM)
- 360 BO all details (ENG)
- 360 BO all details (FSI)
- 360 BO all details (GBL)
- 360 BO all details (INS)
- 360 Company (GBL)
- 360 Contact (COM)
- 360 Contact (ENG)
- 360 Contact (FSI)

- 360 Contact (GBL)
- 360 Organization (COM)
- 360 Organization (ENG)
- 360 Organization (FSI)
- 360 Organization (GBL)
- 360 Partner and Partner Cont
- 360 Partner Company
- 360 Person (COM)
- 360 Person (ENG)
- 360 Person (FSI)
- 360 Person (GBL)
- 360 Worker
- CDM Alt Capacity with Cust ID
- CDM Bill To Customer
- CDM Company with Cust ID
- CDM Consumer with Cust ID
- CDM Contact
- CDM Customer with Cust ID
- CDM Customer with Cust ID FSI
- CDM Partner
- CDM Partnership with Cust ID
- CDM Ship To Customer
- CDM Site
- CDM Worker
- ERMS ConfgSrchRecipient
- ERMS ConfgSrch Sender
- ERMS Contacts
- ERMS Customer and Partner
- ERMS Email - External
- ERMS Email - External (D)
- ERMS Email - Partner
- ERMS Email - Partner (D)
- ERMS Search Contact
- ERMS Search Customer
- FS Company and Consumer
- FS Customer

- FS Person
- FS Sold To Company and Cons
- FSI Customer
- FSI Customer and Contact
- OC (COM/ENG) Consumer
- OC (COM/ENG) Customer
- OC (COM/ENG) Sld to Prim
- OC (COM/ENG) Sold To Customer
- OC (FSI/INS) Customer
- OC Config Search Contact
- OC Sold To Company
- OC Sold To Customer
- RA Partner Contact
- RA Sponsor
- RA Sponsor no Partner
- RA Team
- RA Team no Partner
- RA Worker (N)
- RA Worker and Partner Contact
- RB Inbound Representing
- RB Inbound Sender
- RB Representing
- RB Representing QC
- RB Sender
- RB Sender QC
- RBW Client
- RC COM Customer All Details
- RC COM Person
- RC COM Site and Person
- RC Company and Cons.
- RC Company Site
- RC Company with Contact
- RC Config. Search Contact
- RC Contact
- RC Contact of Company
- RC Contact of Site

- RC Customer All Details
- RC FSI Contact of Cust
- RC FSI Cust (Org) with Cont
- RC FSI Customer
- RC FSI Person
- RC Person
- RC Person PIN Prompt
- RC Person with PIN
- RC Site
- RC Worker
- RC Worker Helpdesk
- RG Worker (N)
- RG Worker and Contact (N)
- RI Config Search Contact
- RO Site
- RQ Worker (N)
- RQ Worker and Contact (N)
- RSF Assigned To
- RSF Contact
- RSF Contact Consumer
- RSF Contact Search
- RSF Customer
- RSF Customer No QC
- RSF Partner with Cont Multi
- RSF Referred By
- RSF Site
- RSF Site no QC
- RSF Worker
- RV Account Owner (Ind)
- RV Account Owner (Org)
- RV Account Owner (Rep)
- RV Account Owner Company
- RV Account Owner Partnership
- RV Account Owner Person
- The Account
- The Account with Bill To

- The Account with Prim Bill To
- The Account with Sold To
- The Alternate Capacity
- The Bill To Comp and Primary
- The Bill To Comp with Primary
- The Bill To Company
- The Bill To Company with Cont
- The Bill To Cons and Primary
- The Bill To Consumer
- The Bill To Consumer with Cont
- The Bill To Cust All Details
- The Bill To Customer
- The Bill To Customer (no QC)
- The Bill To Customer with Cont
- The Bill To Person
- The Company
- The Company (No QC)
- The Company and Primary
- The Company with Contact
- The Company with Primary
- The Company with Site
- The Consumer
- The Consumer and Primary
- The Consumer with Contact
- The Consumer with Primary
- The Contact of Bill To Comp
- The Contact of Bill To Comp(C)
- The Contact of Bill To Cons
- The Contact of Bill To Cons(C)
- The Contact of Bill To Cust
- The Contact of Bill To Cust(C)
- The Contact of Company
- The Contact of Company (C)
- The Contact of Consumer
- The Contact of Consumer (C)
- The Contact of Customer

- The Contact of Customer (C)
- The Contact of Partner
- The Contact of Partner (C)
- The Contact of Ship To Comp
- The Contact of Ship To Comp(C)
- The Contact of Ship To Cons
- The Contact of Ship To Cons(C)
- The Contact of Ship To Cust
- The Contact of Ship To Cust(C)
- The Contact of Sold To Comp
- The Contact of Sold To Comp(C)
- The Contact of Sold To Cons
- The Contact of Sold To Cons(C)
- The Contact of Sold To Cust
- The Contact of Sold To Cust(C)
- The Customer
- The Customer (No QC)
- The Customer All Details
- The Customer and Partner
- The Customer with Cont (no QC)
- The Customer with Contact
- The FSI (Org) Person
- The FSI Contact of Cust (Org)
- The FSI Contact of Cust (Org)C
- The FSI Cust (Org) with Cont
- The FSI Customer (Org)
- The FSI Organization
- The FSI Person
- The Organization Person
- The Partner
- The Partner (no QC)
- The Partner and Primary
- The Partner with Contact
- The Partner with Primary
- The Partnership
- The Person

- The Ship To Comp and Primary
- The Ship To Comp with Primary
- The Ship To Company
- The Ship To Company with Cont
- The Ship To Cons and Primary
- The Ship To Consumer
- The Ship To Consumer with Cont
- The Ship To Cust All Details
- The Ship To Customer
- The Ship To Customer (no QC)
- The Ship To Customer with Cont
- The Ship To Person
- The Site
- The Sold To Comp and Primary
- The Sold To Comp with Primary
- The Sold To Company
- The Sold To Company with Cont
- The Sold To Cons and Primary
- The Sold To Consumer
- The Sold To Consumer with Cont
- The Sold To Cust All Details
- The Sold To Customer
- The Sold To Customer with Cont
- The Sold To Person
- The Worker
- The Worker (no QC)
- The Worker and Cons with Cont
- WM Client

Criteria Fields

This section provides a summary list of the criteria fields provided by PeopleSoft Enterprise CRM. For more detail on how a criteria field is defined in the system, access the Criteria page and search for the criteria description.

See Chapter 14, “Setting Up Business Object Search and Quick Create,” Defining Search Criteria Fields, page 259.

Criteria Description	Field
360 Degree View (COM)	Name
	First Name
	Last Name
	Customer ID
	Account
	Service Phone
	Phone
	Email
	Address
	City
	State
	Postal
	Country
360 Degree View (ENG)	Name
	First Name
	Last Name
	Customer ID
	Account
	Phone
	Email
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
360 Degree View (FSI)	Name
	First Name
	Last Name
	Customer ID
	SSN/TIN
	Account
	Financial Account
	ATM Card
	Phone
	Email
	Address
	City
	State
	Postal
	Country
360 Degree View (GBL)	Name
	First Name
	Last Name
	Customer ID
	Phone
	Email
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
360 Degree View (HRHD)	Employee ID
	First Name
	Last Name
	National ID
	Country
	State
	City
360 Degree View (INS)	Name
	First Name
	Last Name
	Customer ID
	SSN/TIN
	Account
	Financial Account
	Phone
	Email
	Address
	City
	State
	Postal
	Country
360 Degree View (ITHD)	Employee ID
	First Name
	Last Name
	Department Name

Criteria Description	Field
360 Degree View Partner	Name
	First Name
	Last Name
	Customer ID
	Phone
	Email
	Address
	City
	State
	Postal
	Country
CDM Bill To Customer	Name
	First Name
	Last Name
	Phone
	Email
	Customer ID
	Address
CDM Contact	First Name
	Last Name
	Phone
	Email

Criteria Description	Field
CDM Contact Customer	Name
	First Name
	Last Name
	Phone
	Email
	Customer ID
CDM Contact Customer FSI	Name
	First Name
	Last Name
	Phone
	Email
	Customer ID
CDM Person Partner	Name
	Phone
	Email
	State
	Postal
	Country
	Company ID
CDM Ship To Customer	Name
	First Name
	Last Name
	Phone
	Email
	Address
	Customer ID

Criteria Description	Field
CDM Site	Name
	Address
	Phone
	Site ID
CDM Site Customer	Name
	First Name
	Last Name
	Phone
	Email
	Customer ID
CDM Site Customer FSI	Name
	First Name
	Last Name
	Phone
	Email
	Customer ID
CDM Worker	First Name
	Last Name
	Phone
	Email
	Person ID
	Employee ID
CDM Worker Asgmnt Customer	Name
	First Name
	Last Name
	Phone
	Email

Criteria Description	Field
ERMS ConfgSrch Recipient	Name
	First Name
	Last Name
	Email
	Address
ERMS ConfgSrch Representing	Name
	First Name
	Last Name
ERMS ConfgSrch Sender	First Name
	Last Name
ERMS Email	Name
	First Name
	Last Name
	Address
ERMS Email - External	First Name
	Last Name
	Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
ERMS Email - External Represnt	Name
	Phone
	Address
	City
	State
	Postal
	Country
ERMS Email - Internal	First Name
	Last Name
	Email
	Phone
	Person ID
	Employee ID
ERMS Email - Partner	First Name
	Last Name
	Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
ERMS Email — Partner Represent	Name
	Phone
	Address
	City
	State
	Postal
	Country
ERMS Search Contact	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
ERMS Search Customer	Name
	First Name
	Last Name
	Phone
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
ERMS Search Partner	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
ERMS Search Partner Contact	First Name
	Last Name
	Phone
	Email
	Address
	City
	Postal
	State
	Country

Criteria Description	Field
FS Config Search Customer	Name
	First Name
	Last Name
	Phone
	Address
	City
	State
	Postal
	Country
FS Config Search Sold To Customer	Name
	First Name
	Last Name
	Phone
	Address
	City
	State
	Postal
	Country
FS Contact of Customer	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
FS Contact of Sold To Customer	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
FS Customer	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
FS Customer (No Contact)	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
FS Employee	Employee ID
	First Name
	Last Name
	Department
	Location
	Physical Location
	Phone
	Email
FS Partner	Name
	First Name
	Last Name
	Phone
	Email
	Address

Criteria Description	Field
FS Partner Company Contact	First Name
	Last Name
	Phone
	Email
	Address
FS Provider Group Customer	Name
	First Name
	Last Name
	Phone
	Email
FS Sold To Customer	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
FS Sold To Customer (No Cont)	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
FS Worker	First Name
	Last Name
	Department
	Location
	Phone
	Email
FSI Customer	Name
	First Name
	Last Name
	Phone
	Address
	City
	State
	PIN

Criteria Description	Field
FSI Customer and Contact	Name
	First Name
	Last Name
	First Name
	Last Name
	Phone
	Address
	City
	State
	PIN
FSI Person	First Name
	Last Name
	Address
	City
	State
	PIN
	Phone
OC (COM/ENG) Consumer	First Name
	Last Name
	Account
FSI (COM/ENG) Customer	Name
	Account ID
	First Name
	Last Name
	Phone
	Address

Criteria Description	Field
OC (FSI/INS) Customer	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
OC Capture Partner Contact	Last Name
	First Name
	Phone
	Email
	Address
OC Contact of Partner	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
OC Contact of Sold To Customer	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
OC Order Capture Partner	Name
	First Name
	Last Name
	Phone
	Email
	Address
OC Sold To Cont (Config. Srch)	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
OC Sold To Customer	Name
	First Name
	Last Name
	Phone
	Address
	City
	State
	Postal
	Country
RA Owner Partner Contact	Name
	First Name
	Last Name
	Phone
	Email
	Employee ID
	Person ID
RA Owner Worker	Name
	First Name
	Last Name
	Phone
	Email
	Employee ID
	Person ID

Criteria Description	Field
RA Owner Worker/Partner Cntct	Name
	First Name
	Last Name
	Phone
	Email
	Employee ID
	Person ID
RA Partner Only	Name
	City
	State
	Postal
	Country
RA Recipient	Name
	First Name
	Last Name
	Email
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
RA Recipient no Partner	Name
	First Name
	Last Name
	Email
	Address
	City
	State
	Postal
	Country
RA Sponsor	Name
	Last Name
	First Name
	Email
	Address
	City
	State
	Postal
RA Sponsor no Partner	Name
	Last Name
	First Name
	Email
	Address
	City
	State
	Postal

Criteria Description	Field
RA Team	Name
	First Name
	Last Name
	Email
	Address
	City
	State
	Postal
	Country
RA Team no Partner	Name
	First Name
	Last Name
	Email
	Address
	City
	State
	Postal
	Country
RB Inbound Representing	Name
	First Name
	Last Name
RB Inbound Sender	Name
	First Name
	Last Name
	Email
RB Representing	Name
	Customer ID

Criteria Description	Field
RB Representing QC	Name
	Customer ID
RB Sender	First Name
	Last Name
	Phone
	Email
	Address
RB Sender QC	First Name
	Last Name
	Phone
	Email
	Address
RBC recipient search	Name
	First Name
	Last Name
	Email
	Address
RBW Client	Salutation
	First Name
	Middle Name
	Last Name
	Suffix
RC Bill To Contact	Name

Criteria Description	Field
RC Bill To Customer	Name
	Last Name
	First Name
	Phone
	Email
	Address
	City
	State
	Country
RC COM Customer	Name
	First Name
	Last Name
	Address
	City
	State
	Country
	Postal
	Account
	Service Phone
RC Company Site	Name
	Address
	SIN

Criteria Description	Field
RC Config. Search Customer	Name
	First Name
	Last Name
	Phone
	Address
	City
	State
	Postal
	Country
RC Contact	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
RC Contact Note	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
RC Customer	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
	PIN
	SIN
	Serial Number
	Agreement ID

Criteria Description	Field
RC Customer (name split)	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
	PIN
	SIN
	Serial Number
	Agreement ID
RC Customer Note	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
RC Employee	Employee ID
	First Name
	Last Name
	Department Name
	Location Name
	Physical Location
	Phone
	Email
RC Employee Config. Search	Employee ID
	First Name
	Last Name
	Department Name
	Location Name
	Physical Location
	Phone
	Email
RC FSI Contact	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
RC FSI Customer	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
	Account
RC GOV Customer	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Country

Criteria Description	Field
RC HR Employee	Employee ID
	National ID
	First Name
	Last Name
	Department Name
	Location Name
	Physical Location
	Phone
	Email
	City
	State
	Country
RC Partner	Name
	First Name
	Last Name
	Phone
	Email
	Address
RC Person Config. Search	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
RC Person PIN	First Name
	Last Name
	PIN
RC Report Customer	Name
	First Name
	Last Name
	Address
RC Site	Name
	Address
	State
	City
	Country
	Postal
RG Employee	Name
	First Name
	Last Name
	Phone
	Email
	Employee ID
	Person ID
RG Employee and Contact	Name
	First Name
	Last Name
	Phone
	Email
	Employee ID
	Person ID

Criteria Description	Field
RG Owner	Name
	First Name
	Last Name
	Phone
	Email
	Employee ID
	Person ID
RG Requester	Name
	First Name
	Last Name
	Phone
	Email
	Employee ID
	Person ID
RI Interaction View(GBL)	Name
	First Name
	Last Name
	Customer ID
	Phone
	Email

Criteria Description	Field
RI Person Config. Search	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
RO Site	Name
	Address
	City
	State
	Postal
	Country
	Site ID
RQ Employee	Name
	First Name
	Last Name
	Phone
	Email
	Employee ID
	Person ID

Criteria Description	Field
RQ Worker and Contact	Name
	First Name
	Last Name
	Phone
	Email
	Employee ID
	Person ID
RSF Assigned To	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal
	Country
RSF Contact Search	Name
	Address
	Phone
RSF Customer No QC	Name
	First Name
	Last Name
	Phone
	Address

Criteria Description	Field
RSF Lead Import Customer	Name
	First Name
	Last Name
	Phone
	Address
RSF Partner	Name
	First Name
	Last Name
	City
	State
	Postal
	Country
RSF Partner Rep	Name
	First Name
	Last Name
	City
	State
	Postal
	Country
RSF Referred By (worker/cons)	First Name
	Last Name
	Phone
	Email
	Set ID

Criteria Description	Field
RSF Sales Contact	Name
	First Name
	Last Name
	Phone
	Email
	Address
	City
	Postal
	State
	Country
RSF Sales Customer	Name
	First Name
	Last Name
	Phone
	Address
RSF Sales Customer No QC	Name
	First Name
	Last Name
	Phone
	Address
RSF Sales Rep (Worker)	First Name
	Last Name
	Phone
	Email
	Address

Criteria Description	Field
RSF Site	Name
	Address
	City
	State
	Postal
	Country
	Site ID
RSF Site no QC	Name
	Address
	City
	State
	Postal
	Country
	Site ID
The Alt Capacity	Name
	Address
	City
	State
	Postal
	Country
The Bill To Company	Name
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
The Bill To Consumer	First Name
	Last Name
	Email
	Phone
	Address
	City
	State
	Postal
	Country
The Company	Name
	Address
	City
	State
	Postal
	Country
The Consumer	First Name
	Last Name
	Email
	Phone
	Address
	State
	City
	Postal
	Country

Criteria Description	Field
The Contact	First Name
	Last Name
	Email
	Phone
	Address
	City
	State
	Postal
	Country
The Contact of Partner (C)	First Name
	Last Name
	City
	State
	Postal
	Country
The Partner	Name
	First Name
	Last Name
	City
	State
	Postal
	Country

Criteria Description	Field
The Partnership	Name
	Address
	City
	Country
	State
	Postal
The Person	First Name
	Last Name
	Email
	Phone
	Address
	City
	State
	Postal
	Country
The Ship To Company	Name
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
The Ship To Consumer	First Name
	Last Name
	Email
	Phone
	Address
	City
	State
	Postal
	Country
The Site	Name
	Address
	Phone
	Site ID
The Sold To Company	Name
	Address
	City
	State
	Postal
	Country

Criteria Description	Field
The Sold To Consumer	First Name
	Last Name
	Email
	Phone
	Address
	City
	State
	Postal
	Country
The Worker	First Name
	Last Name
	Email
	Employee ID
	Person ID
	Phone
WM Client	First Name
	Last Name
	Phone
	Email
	Address
	City
	State
	Postal

Adapter Definitions

This section provides a summary list of the adapter definitions that are provided by PeopleSoft Enterprise CRM. For more detail on how each adapter is defined in the system, access the Adapter page and search for the adapter description.

See Chapter 14, "Setting Up Business Object Search and Quick Create," Defining Fields for Transaction Subpages, page 261 and Chapter 14, "Setting Up Business Object Search and Quick Create," Specifying Basic Search Criteria Fields, page 260.

- 360 Communication
- 360 Energy
- 360 Financial Services
- 360 Global
- 360 HRHD
- 360 Insurance
- 360 ITHD
- 360 Partner
- CDM Alternate Capacity
- CDM Company
- CDM Partner
- CDM Partner Distributed Sec
- CDM Partnership
- CDM Person
- CDM Relationship Viewer
- CDM Service Location
- CDM Site
- CDM Worker
- CDM Worker Copy
- CDM Worker Create
- ERMS ConfgSrch Inbound Email
- ERMS ConfgSrch Outbound Email
- ERMS Email - External
- ERMS Email - Internal
- ERMS Email - Partner
- ERMS Outbound Email
- ERMS Search HelpDesk Case
- ERMS Search OrderCaseSale etc
- ERMS Search Recipient
- ERMS Search Service Order
- FS Agreement External Create
- FS Agreement External Update
- FS Agreement Internal
- FS Agreement Search

- FS Dashboard
- FS Dispatch Performance
- FS Expenses by Customer
- FS Installed Asset
- FS Installed Asset Search
- FS Installed Product Create
- FS Installed Product Search
- FS Installed Product Update
- FS Material Orders Search
- FS Mean Time to Repair
- FS My Service Order
- FS My Service Order Search
- FS Provider Group
- FS Review PM Search
- FS Service Order Aging
- FS Service Order Create
- FS Service Order Search
- FS Service Order Update
- FS Set Up Tree
- FSI Access Trace Search
- FSI Billing Account
- FSI Financial Account Search
- FSI Modify Account
- FSI Review Modify Account
- FSI Security Matrix Search
- GBL Map Dashboard
- INS Financial Account Search
- OC (COM/ENG) Customer
- OC (FSI/INS) Customer
- OC Customer Srch (Search Page)
- OC Order Capture
- OC Order Capture (PARTNER)
- OC RX Site
- RA Audience
- RA Marketing
- RA Marketing Calendar

- RA Marketing Content
- RA Marketing no Partner
- RA Marketing Offers
- RA Marketing Partner
- RA Mkt Calendar no Partner
- RBC Correspondence Search
- RC Case Related Cases Search
- RC Case Search
- RC Communications
- RC Financial Services
- RC Government
- RC Helpdesk
- RC HRHelpdesk
- RC Report Case by Age
- RC Report Cases by Customer
- RC Report Cases by Priority
- RC Report Dashboard
- RC Report Service Level Mgmt
- RC RMA
- RC Support
- RG Change Management
- RI Interaction List Search
- RI Interaction Personalize
- RQ Quality Defects
- RQ Quality Defects Setup
- RQ Quality Fixes
- RSF Leads
- RSF Opportunity
- RSF Sales Lead Import Results
- RSF Search Leads
- RSF Search Opportunities
- RSF Search Referrals
- RY Dialogs Marketing Objects
- RY Dialogs no Partner
- RY Dialogs Partner
- WM Asset/Liability

- WM Client at Risk
- WM Client Relationship
- WM Household Mameber
- WM Product of Interest

CHAPTER 13

Using Business Object Search and Quick Create Functionality

This chapter provides an overview of the runtime processes for business object search and quick create and discusses how to:

- Search for business objects.
- Create business objects by using the Quick Create component.

Understanding the Business Object Search and Quick Create Process

This section discusses:

- Business object search.
- Customer identification.
- Quick create.

Business Object Search

When users create a transaction in PeopleSoft Enterprise CRM and does not know the specific value for a business object that the transaction uses, they can invoke a business object search to find the field value. The system determines the information that is needed depending on the page where the business object search was initiated and searches for the business object.

If the business object is not uniquely identified from the information that the user enters, a search page that contains both a list of objects that are potential matches and additional search fields appears.

See Also

Chapter 12, "Working with Predefined Business Object Search and Quick Create Data," page 165

Chapter 13, "Using Business Object Search and Quick Create Functionality," Identifying Customers for Transactions, page 238

Chapter 14, "Setting Up Business Object Search and Quick Create," Adding and Modifying BO Search and Quick Create Definitions, page 247

Customer Identification

The customer identification framework uses business object search to provide an easy and consistent way to identify the customer—company, partner, consumer, contact, or site—for a transaction.

Each transaction page has one or more subpages that contains the fields for entering customer, contact, and other information such as phone, site, identification number, or account number.

The subpages that appear and fields that appear on each subpage vary depending on the information that each transaction needs. For example, the customer information fields for order capture are Customer, First Name, and Last Name while the fields for creating a support case are Company, First Name, Last Name, and SIN (Service Identification Number). The customer information subpage might have one or two columns, depending on the needs of the page layout. Additional subpages might appear with partner information or worker information

The user enters information in one or more fields and initiates a search. If a business object that uniquely matches the criteria that are entered is found, it is returned to the customer information subpage. If not, a page containing additional search criteria and a list of potential matches appears. The user can:

- Select a record.
- Refine the search criteria and search again.
- Create a new object using quick create.

Quick Create Functionality

The quick create functionality in PeopleSoft Enterprise CRM enables users to create business objects quickly and easily without navigating to the business object components. This functionality is available either from within a PeopleSoft Enterprise CRM application or by using the standalone Quick Create component.

Quick create definitions that are set up in the system and associated with transactions enable users to enter the subset of business object information that is required to define a business object and save it to the database. The business object information that is created is returned to the application so that the business process can continue. Some quick create definitions are set up to create more that one business object and the relationships between the business objects at the same time. For example, the *The Company with Contact* definition creates both a company and a contact.

The Quick Create component:

- As a standalone component by selecting Customers CRM.
- From the business object search page within a PeopleSoft Enterprise CRM transaction.
- Directly from a PeopleSoft Enterprise CRM application component, such as the Create Order transaction.

BO Search and Quick Create Runtime Example

For example, a call center agent might receive a call from a contact named Larry Hill who represents a customer company named MMA Property Management. The agent opens a case and searches for a company name of MMA with a last name of Hill.

If the information that the agent enters does not uniquely identify a customer and contact, the advanced search page appears. This page contains both expanded search criteria fields and a search results section that lists all companies whose name begins with the letters MMA that are represented by a contact with a last name of Hill appears. The agent can then:

- Select the correct company and contact combination.
- Enter additional search criteria and search again.

- Define a new company with contact.

  This option uses the quick create feature.

BO Search System Processing

Behind the scenes:

- The transaction adapter determines, based on the transaction, what fields appear on the customer information subpage and the criteria definition that defines the advanced search page.
- The criteria definition determines what criteria fields appear on the advanced search page, how they appear, and the search definitions to invoke.
- The search definition determines the roles to search for the criteria fields, the fields that appear in the search results, how the search results appear, and the quick create definition that the user accesses to create a new business object.
- For each role that is searched, the search role determines the security that is applied, the relationships for the role, and whether fields appear in the search criteria or results set for the role.
- The field definitions determine how the search fields appear on the page, the database records that are searched for each field, and how the user can search for the field.

Quick Create System Processing

Behind the scenes:

- The quick create definition determines which quick create templates to display to the user.
- The quick create template definitions determine both the fields that appear on the quick create page and the criteria that are used to search for existing objects of the type that is defined.

See Also

Chapter 12, “Working with Predefined Business Object Search and Quick Create Data,” Understanding Delivered System Data for BO Search and Quick Create, page 165

Searching for Business Objects

This section discusses how to search for business objects.

- Identify customers for transactions.
- Search for business objects.

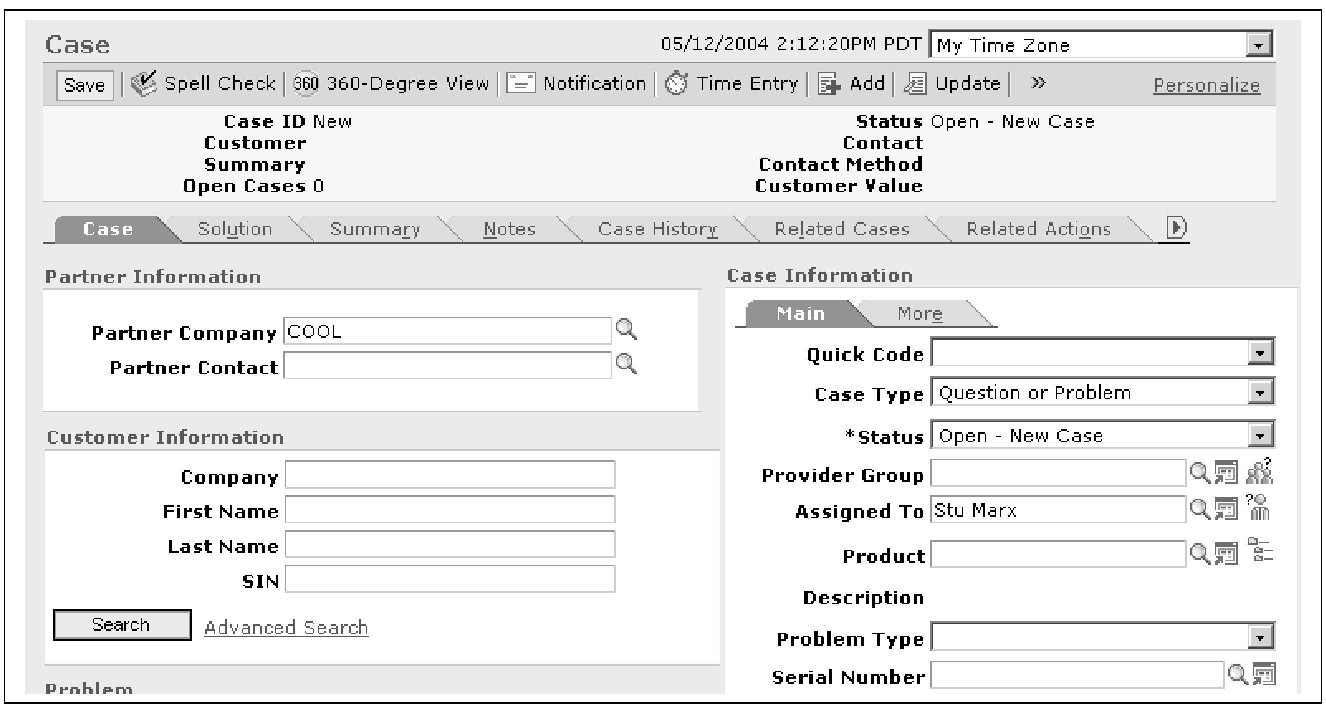
Pages Used to Search for Business Objects

Page Name	Object Name	Navigation	Usage
Search For <object>	RBQ_BOSRCH	• Customers CRM, Business Object Search • Enter customer information in any Customer Information group box on a transaction. • Click the Advanced Search link on any page that is enabled for BO search. • Click the search icon (next to any field on a PeopleSoft Enterprise CRM component or on transaction pages that are enabled for BO search.	Search for a business object in the PeopleSoft Enterprise CRM database.

Identifying Customers for Transactions

Access the customer identification subpage on any transaction that is enabled for customer identification.

Note. The example shown is from the Add Case component and contains two identification subpages, Partner Information and Customer Information. Other components that use this feature function similarly although different subpages appear.



Case page

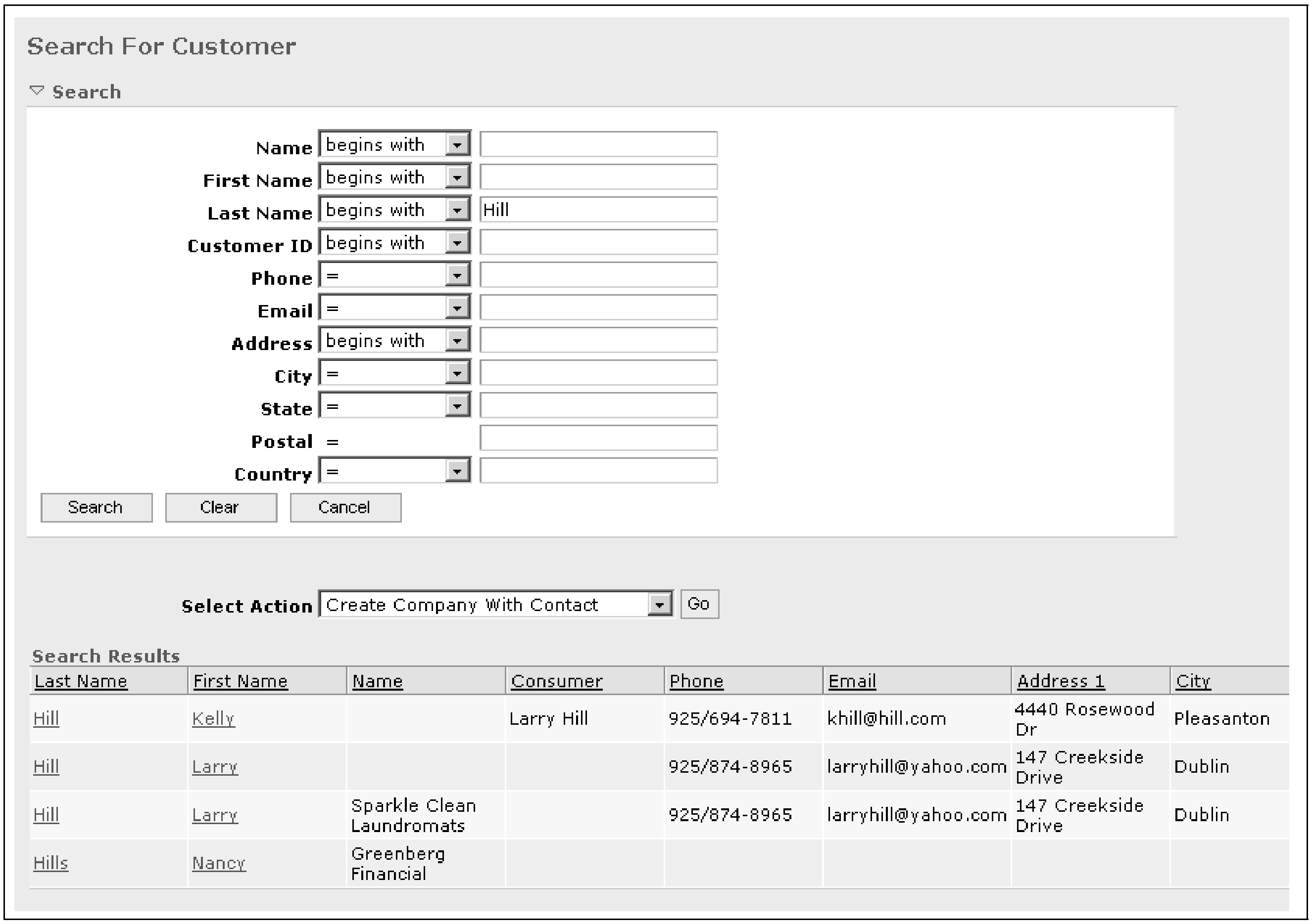
Enter any information that you know into the fields in the Partner Information region or the Customer Identification region and click Search. If the customer is not uniquely identified by the information that you enter, an advanced search page appears. You can also click the Advanced Search link to access the Search for <object> page.

Advanced Search

When you initiate the advanced search, the Search for <object> page appears. This page enables you to refine the search fields that you enter on the customer information subpage. This page contains additional search criteria and, depending on how the search criteria are set up, a link that accesses a quick create page to create a new business object or objects.

Searching for Business Objects

Access the Search for <object> page.



Search for Customer page

This page is identical to the advanced search pages that appear for customer identification. This page contains additional search criteria and, depending on how the search criteria are set up, an link that accesses a quick create page to create a new business object or objects. In the example above, the user can create a new company with a contact.

Search Results

In the case where more than one business object meets the search criteria, the Search Results grid appears. You can select one entry in this grid or select a new type of business object to create by using the Select Action box.

Creating Business Objects by Using the Quick Create Component

This section discusses how to create business objects by using quick create functionality.

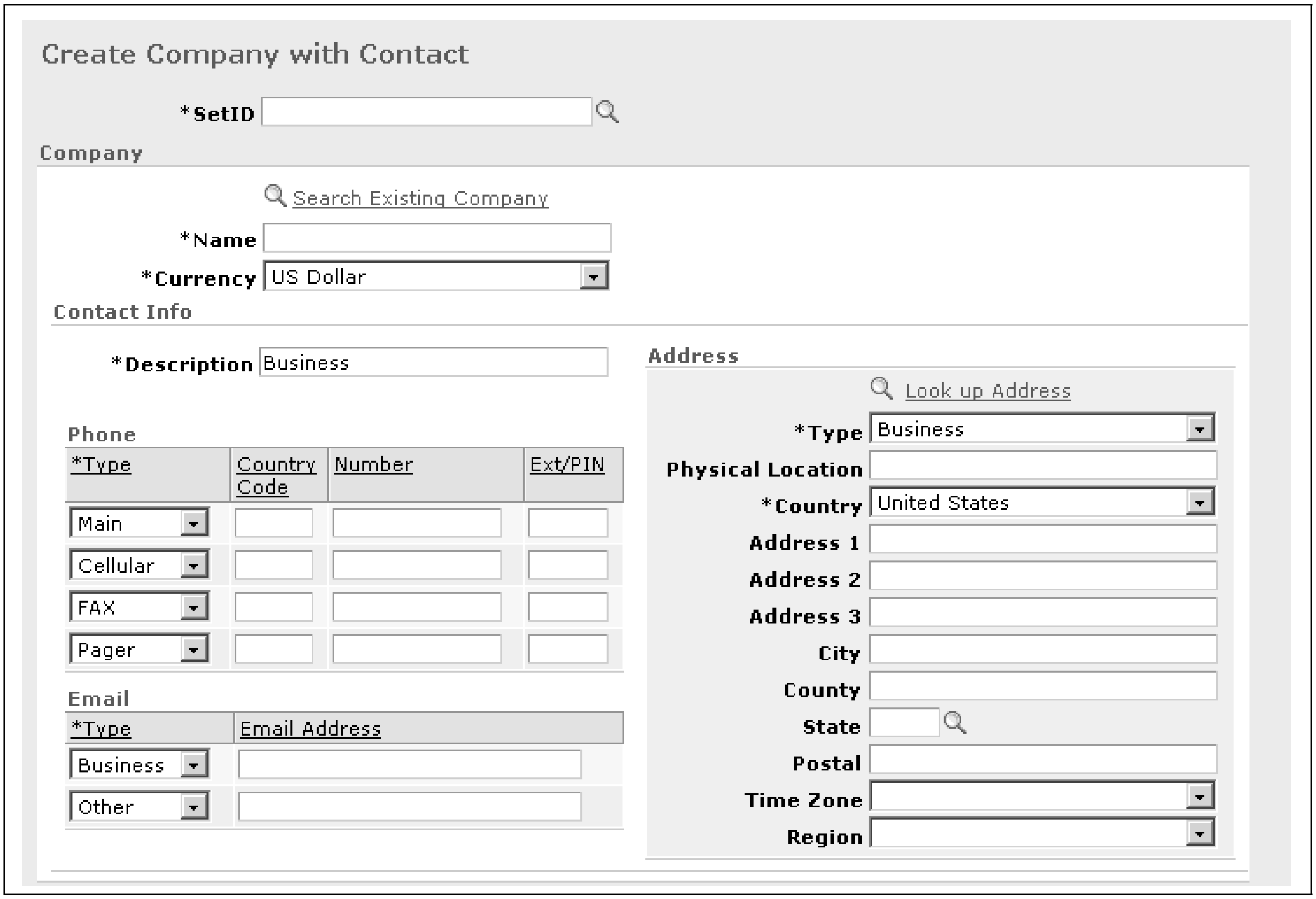
Note. The functionality of the Quick Create page is flexible and enables you to create as many business objects as you want without leaving the page.

Page Used to Create Business Objects by Using Quick Create Functionality

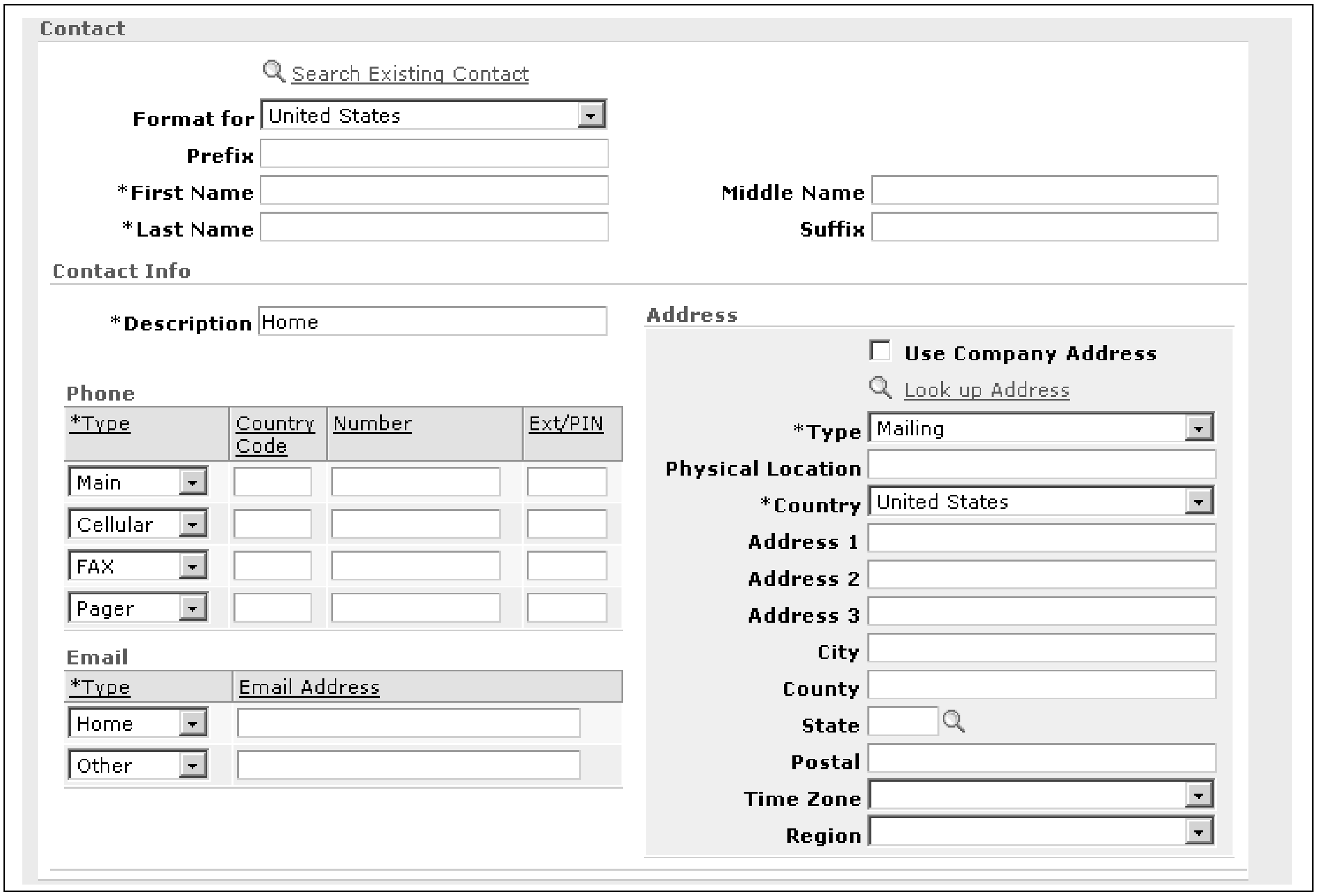
Page Name	Object Name	Navigation	Usage
Create <quick create definition name>	RBQ_QCREATE	• Customers CRM, Quick Create, Quick Create • Click the link or Go button next to the Create New field on the business object lookup page. • Click the Create New button on a PeopleSoft Enterprise CRM application page.	Create business objects.

Creating Business Objects by Using Quick Create Functionality

Access the Create <quick create definition name> page.



Create Company with Contact page (1 of 2)



Create Company with Contact page (2 of 2)

The preceding quick create page is for the Company with Contact definition. This section discusses the common features that are on all quick create pages.

SetID

Enter the setID for the objects you are creating. This field appears only for objects that are controlled by a setID and is defined on the quick create definition.

Search Existing <object>

Click this link to search for existing business objects that match the information you entered. For example, if you enter a company name of *MMA*, you can search for existing companies whose name starts with MMA. This helps to ensure that you do not enter duplicate data.

Clear

Click to clear the section of the Quick Create page.

Quick Create Process Upon Save

Once you save the Quick Create page, the system:

1. Verifies that all *required* fields are present.

   If not, then the system returns an error message.

2. Creates the business object for each role that is present on the Quick Create page that has data.

   For example, if the Quick Create page enables you to create a company and contact, but entering a contact is optional, then you can create a company without a contact. The contact is created only if you also enter contact data.

3. Creates the relationship between multiple roles, if the information for these roles is present and the relationship between these roles is set up in the quick create template.

   For example, if the quick create template enables you to create company and a contact for the company at the same time and also has a relationship set up between the two roles on the template, then when you enter the different roles and their information on the Quick Create page, both the company and the contact are created and the contact is linked to the company.

4. Returns newly created data to the calling application if you access the Quick Create page from a PeopleSoft Enterprise CRM application.

   If you are in the standalone Quick Create component, then you remain on the Quick Create page after you save.

CHAPTER 14

Setting Up Business Object Search and Quick Create

This chapter provides an overview of the business object (BO) search and quick create definition process and discusses how to define BO searches and quick create pages.

Understanding BO Search and Quick Create Setup

This section lists common elements and discusses:

- BO search runtime process.
- Quick create runtime process.
- BO search and quick create setup process.

Common Elements Used in this Chapter

Field Search fields are common objects that are used in BO search and quick create definitions. A field definition specifies the location of the field in the database, how the system searches for the field, the label of the field on the user interface, and how the field is updated by quick create.

Fields are used in the following BO search and quick create elements:

- Search roles.
- Search definitions.
- Search criteria.
- Transaction adapter.
- Quick create templates.

Quick Create Template A quick create template associates the fields that are entered with the business object roles that are updated when a user creates a business object using quick create. The criteria definition specifies the search criteria page on which quick create definitions that this template is associated with appear.

Quick Create Definition A quick create definition is composed of one or more templates that appear to the user when the quick create definition is invoked. You can use the the same quick create template in more than one definition.

Search Role

A search role definition associates field definitions to one or more role type. When user search for a field, only business objects that have a role that is associated with the field are returned in the search results.

Search roles are used in search definitions.

Search Definition

A search definition is a collection of search roles and quick create definitions. Search definitions specify the roles and fields that are searched for data that a user enters. If you specify a quick create definition on the search definition, then the quick create definition is enabled on the search results page.

You use search definitions in search criteria.

Search Criteria

Search criteria specify the search definitions that are invoked when the user enters data in certain fields on a component. You can specify a default search definition and up to four alternate definitions. You then select fields and associate each field with one or more search definitions. If you do not select a search definition for the field, then the default search definition is used.

You associate criteria definitions with adapter sections.

Adapter

The adapter specifies the BO search definitions and quick create definitions that are enabled for a particular component or transaction. The adapter also defines the fields that appear in basic search mode, the search criteria to invoke for these fields, and the subpages of the component upon which these fields appear.

BO Search Runtime Processes

PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM) provides the capability for users to search for business objects that they need to reference on transactions or components. When users don't know the exact name of the business object to reference, they can initiate a BO search to find the business object based on any information that they might know. The system determines the information that it requires to locate the BO and presents a search page for the user to enter known information.

The customer identification framework also uses BO search technology without the user having to explicitly initiate a search.

When a user searches for an object that does not already exist in the system, some PeopleSoft Enterprise CRM transactions provide quick create functionality that enables the user to create that object with a minimum set of data. For example, when a contact calls for service on behalf of a company, the customer service representative (CSR) verifies the contact's information by doing a BO search for the contact. If the contact is not found in the database, the CSR can create a contact immediately and associate it to the company.

BO search and quick create functions are tightly integrated with each other, and they use much of the same system data.

See Also

Chapter 13, "Using Business Object Search and Quick Create Functionality," Understanding the Business Object Search and Quick Create Process, page 235

Chapter 13, "Using Business Object Search and Quick Create Functionality," Identifying Customers for Transactions, page 238

BO Search and Quick Create Setup

This is the BO search and quick create setup process:

1. Define search fields.
2. Define quick create templates.
3. Enter a quick create definition.
4. Define search roles.
5. Enter a search definition.
6. Define search criteria.
7. Define the BO search and quick create adapter.

Note. Setting up BO search and quick create definitions requires a good understanding of roles and relationships in the system.

See Also

Chapter 2, “Understanding Business Object Relationship Model Components,” Business Object Relationship Modelling, page 7

Delivered Definitions

PeopleSoft Enterprise CRM delivers a robust set of predefined system data that meets most business requirements. Search the delivered definitions before attempting to modify or add new business object search or quick create definitions. To search the delivered definitions, access the setup component for that definition and run a search without entering search criteria. A list of all defined items appears.

Important! PeopleSoft does not support changes made to the search definitions delivered with PeopleSoft Enterprise CRM. Implementation of any new search definitions that you create requires a coding effort, which is also not supported by PeopleSoft.

See Also

Chapter 12, “Working with Predefined Business Object Search and Quick Create Data,” page 165

Adding and Modifying BO Search and Quick Create Definitions

This section discusses how to:

- Define fields.
- Define roles for a field.
- Define quick create templates.
- Define relationships for a template.
- Set up quick create definitions.
- Associate search fields with a role type.
- Define BO searches.
- Define search criteria fields.
- Specify basic search criteria fields.

- Define fields for transaction subpages.

See Also

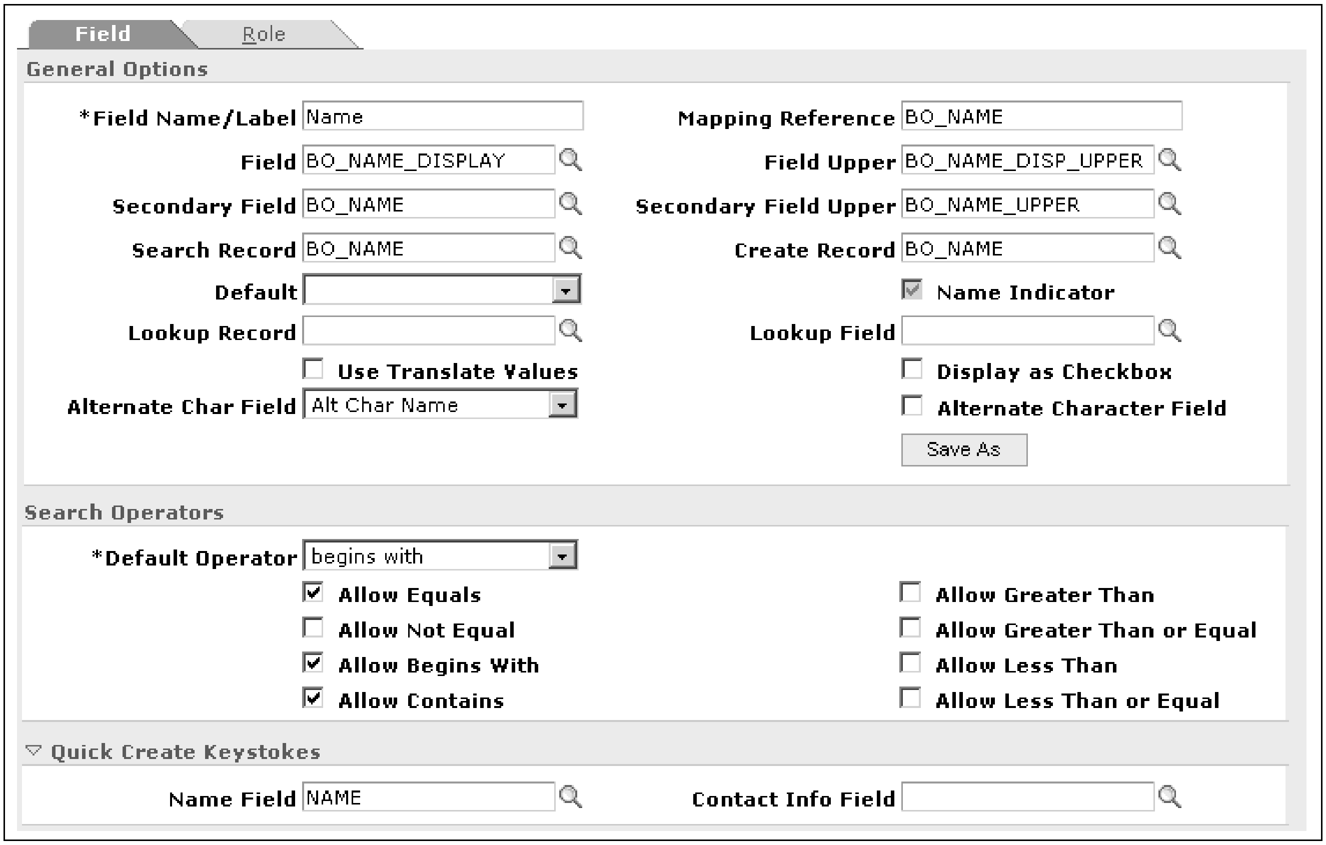
Chapter 14, "Setting Up Business Object Search and Quick Create," Understanding BO Search and Quick Create Setup, page 245

Pages Used to Add or Modify Search Definitions

Page Name	Object Name	Navigation	Usage
Field	RBQ_FLDDFN	Set Up CRM, Common Definitions, Customer, BO Search, Field, Field	Define a field that is used in BO Search and quick create definitions.
Role	RBQ_FLDDFN_RL	Set Up CRM, Common Definitions, Customer, BO Search, Field, Role	View the roles that use the field definition. Each role that uses the field definition can override certain information that is defined for the field.
Template	RBQ_QCTMPL	Set Up CRM, Common Definitions, Customer, BO Search, Quick Create Template, Template	Define a quick create template. This defines the business object roles that appear on the Quick Create page when quick create is initiated from a specific component.
Relationships	RBQ_QCTMPL_REL	Access the Template page. Select the Relationships tab.	Define the relationships between the roles defined on the quick create template.
Quick Create	RBQ_QCDFN	Set Up CRM, Common Definitions, Customer, BO Search, Quick Create	Set up a quick create definition and associate one or more quick create templates to it.
Search Role	RBQ_SRCHRL	Set Up CRM, Common Definitions, Customer, BO Search, Search Role	Associate search fields with a role type.
Search	RBQ_SRCHDFN	Set Up CRM, Common Definitions, Customer, BO Search, Search	Define a BO search with one or more search roles, search fields, and related BOs.
Criteria	RBQ_CRITDFN	Set Up CRM, Common Definitions, Customer, BO Search, Criteria	Specify the advanced search criteria fields and advanced search definition.
Adapter	RBQ_ADPTR	Set Up CRM, Common Definitions, Customer, BO Search, Adapter, Adapter	Specify the basic search criteria fields.
Sections	RBQ_ADPTR_SECT	Set Up CRM, Common Definitions, Customer, BO Search, Adapter, Sections	Define the records and fields that appear on transaction subpages.

Defining Fields

Access the Field page.



Field page

General Options

Field Name/Label Enter text that appears for the field on the user interface. The text appears both as a search criteria value that the user can select and as a column in the list of results returned by the search.

Mapping Reference Enter the name that is used by the adapter to refer to the field in the component buffer.

Field and **Secondary Field** Enter the names of the fields that the system searches for values that the user enters at runtime. The system searches the secondary field only if it doesn't find a match in the first field entered.

Field Upper and **Secondary Field Upper** For fields of data type String, enter the names of the upper case fields that corresponds to the Field and Secondary field. This significantly improves performance when not using a case sensitive search.

Search Record Enter the record where BO Search looks for the field to display.

Create Record Enter the record where Quick Create looks for the field to update for a newly created business object.

Default Select the values: *Country, Currency*, or *SETID* that are inserted into the record by default based on the user preferences.

Record Name 1 and **Lookup Field** Enter the record and field that are used at runtime to populate a search field.

Select Use Translate Values and Display as check box if appropriate for the field. Use Translate Values indicates that

Alternate Char Field

Select the alternate character field that is appears when the user ID is enabled for alternate character.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Implementing Alternate Character”.

Search Operator

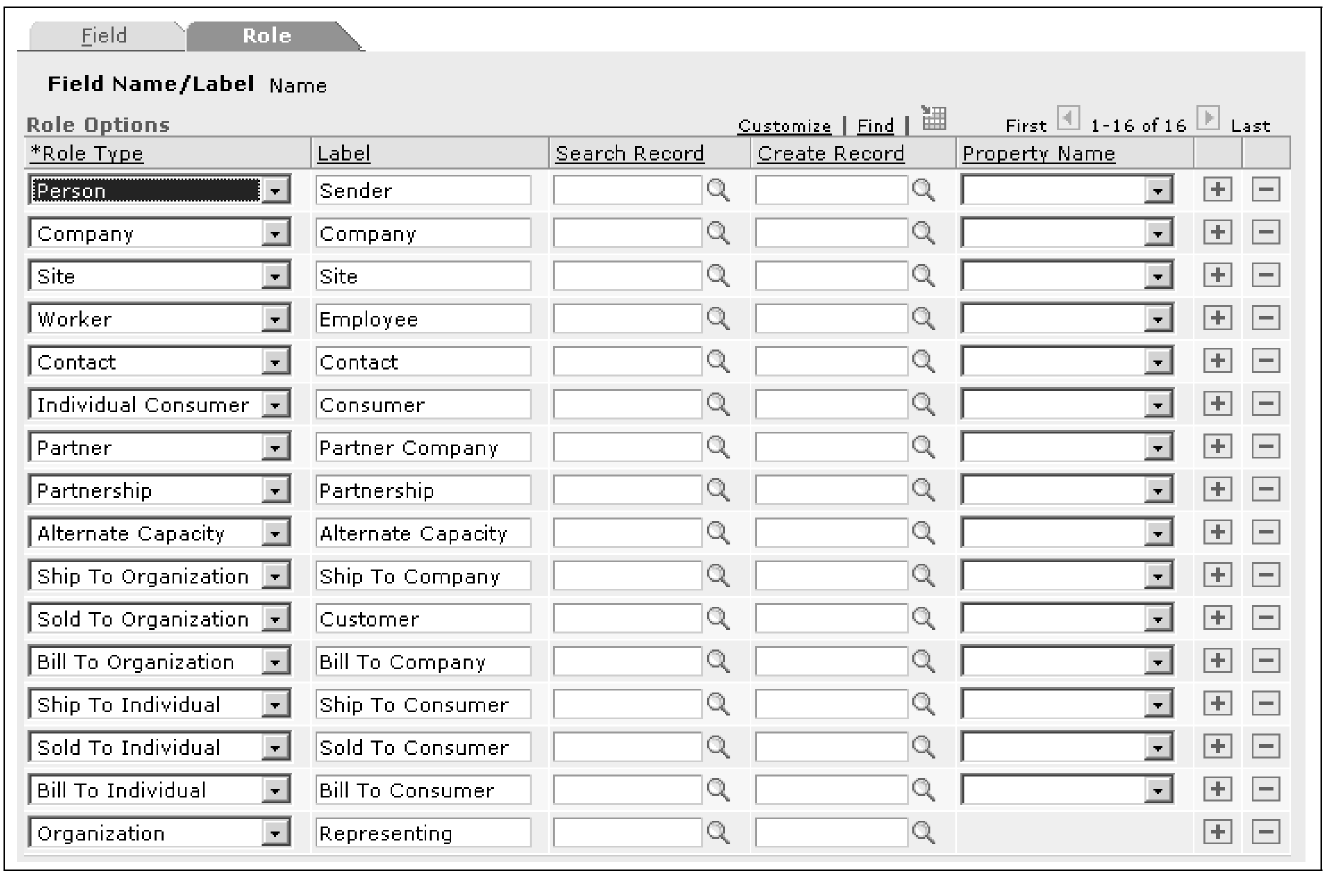
Select the default search operator and the search operators that are visible to the user when this field is searched.

Quick Create Keystrokes

Select the field name(s) that are used to map a BO search criteria value to a quick create field. This enables the system to pre-populate fields on a quick create page when the user creates a new business object after an unsuccessful search.

Viewing Roles that Use a Search Field

Access the Role page.



Role page

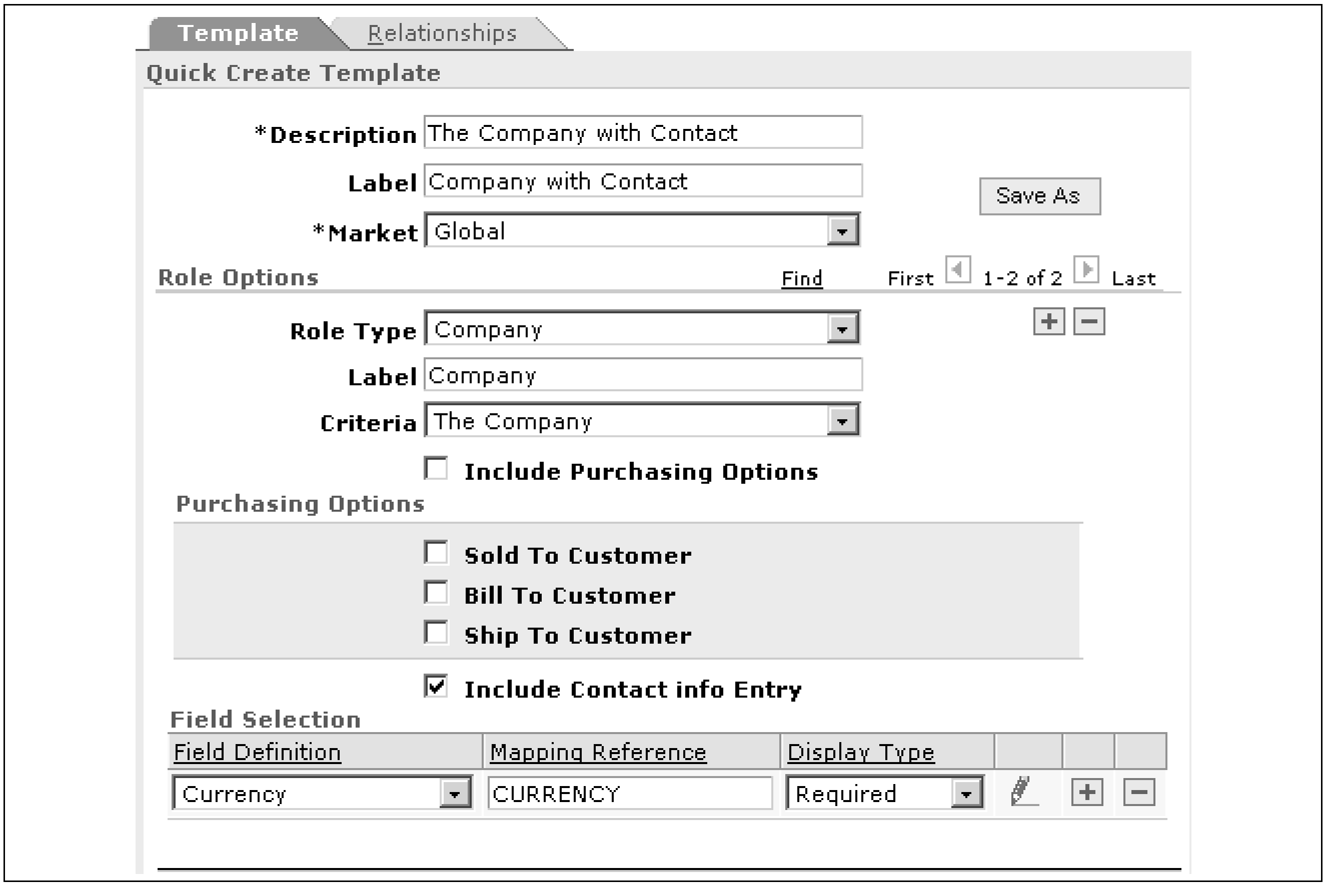
Use this page to indicate different role options for search fields. If the field is used by different role types, you can specify a different label to appear next to the field for each different role type. You can also specify a different search record, update record, and property for each role. The specifications you make on this page override the ones that you made on the Field page.

Property Name

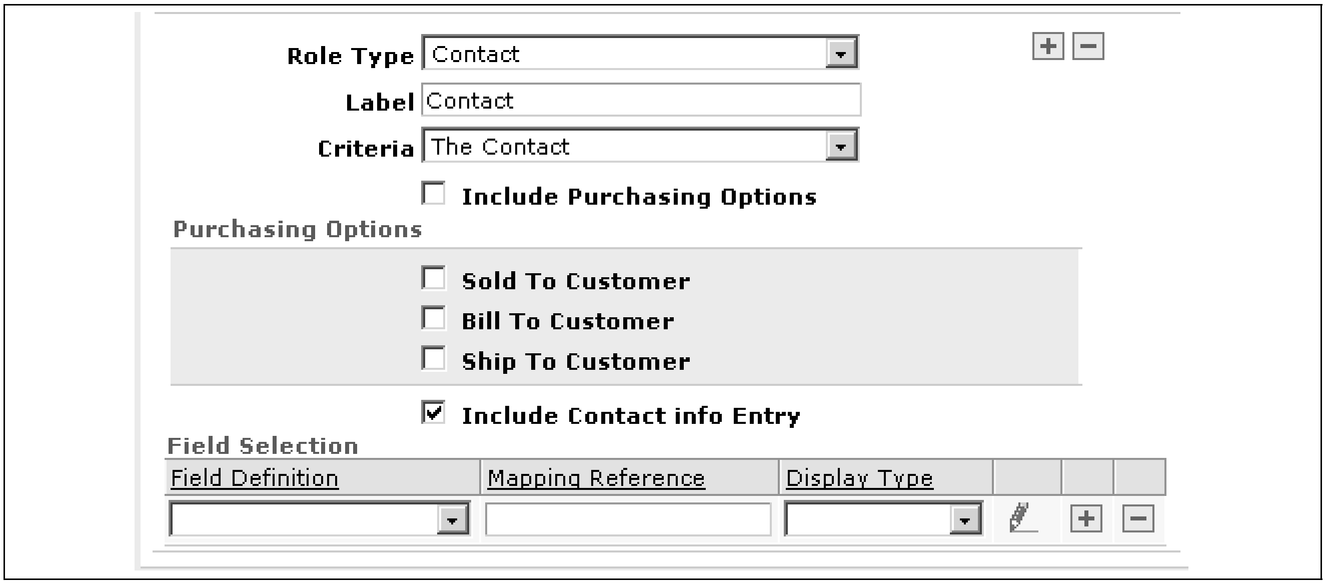
Select a property name for this role. Quick create updates the property with the value that users enter in the corresponding field when they create a new business object using quick create functionality.

Defining Quick Create Templates

Access the Template page.



Template page (1 of 2)



Template page (2 of 2)

Market Select the market for which this template is enabled.

Role Type Select the role type for which you want to enable this quick create template.

Label Enter the label that appears for this role type on the quick create page.

Criteria Select the criteria definition for which this template is invoked.

Include Contact Info Entry Select the contact info entry type that appears on the Quick Create page. This controls the address information that the user can enter for this business object.

Include Sold To/Ship To/Bill To Select have the purchasing options appear on the Quick Create page.

Field Selection

Select one or more field definitions to include on the quick create template.

See Also

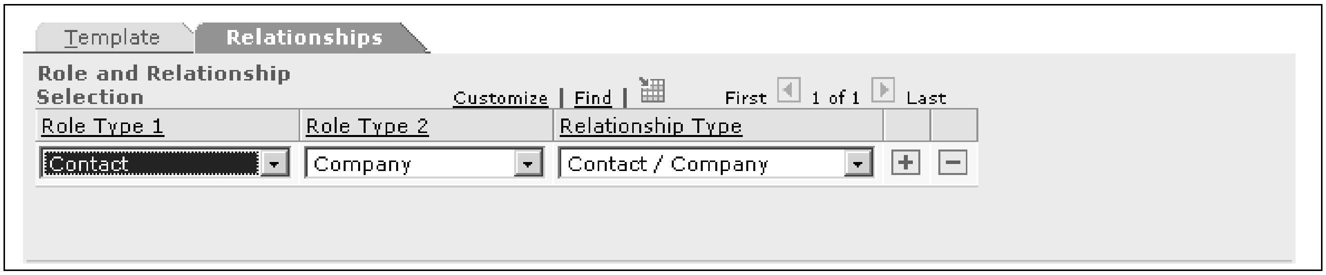
Chapter 4, “Defining Name and Address Information for Business Objects,” Maintaining Address Books for Business Objects, page 51

Chapter 5, “Defining Purchasing Options for Companies, Consumers, and Sites,” page 63

Chapter 14, “Setting Up Business Object Search and Quick Create,” Defining Fields, page 249

Defining Relationship Details for the Template

Access the Relationships page.



Relationships page

Note. Defining template relationships is optional. Define relationships between roles only if you include more than one role on a template.

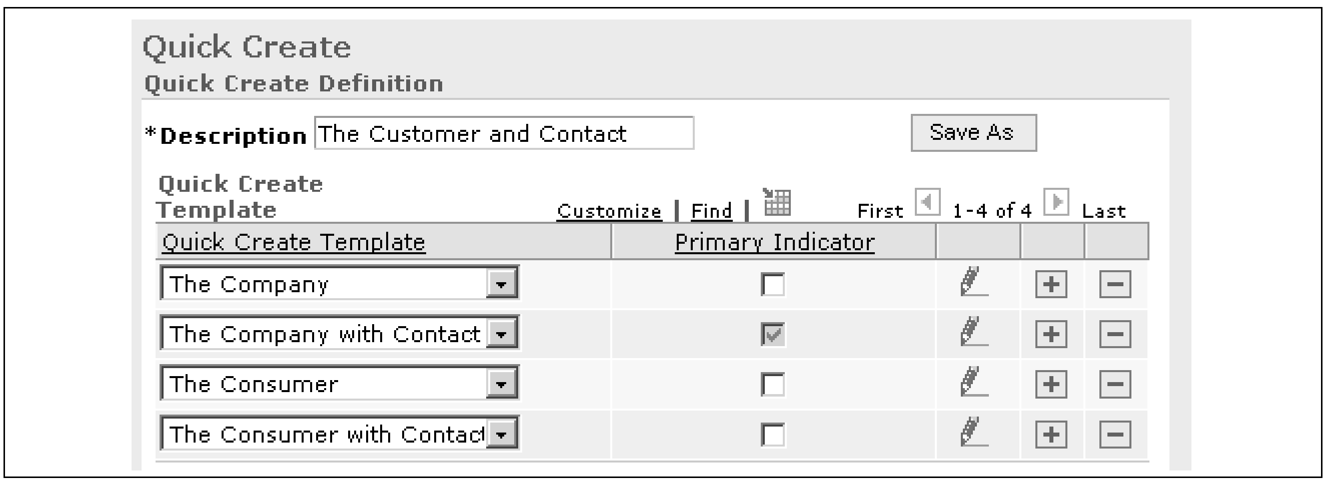
Role and Relationship Selection

This page region enables you to specify the relationships that are built between the roles that are defined on a quick create template.

Role Type 1 and **Role Type 2**	Select the role types that are defined on the template.
Relationship Type	Select the relationship type between the two selected roles.

Setting Up Quick Create Definitions

Access the Quick Create page.

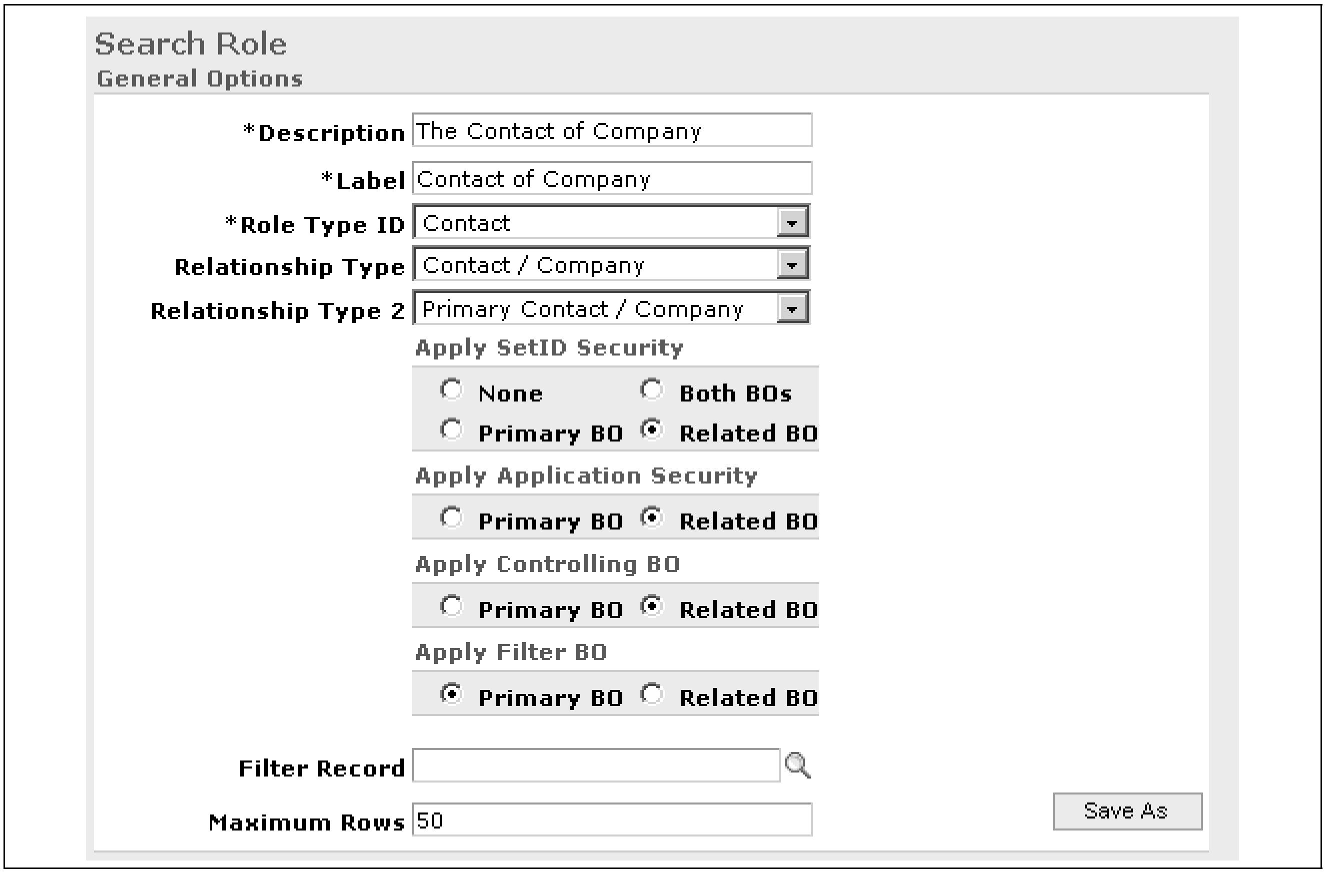


Quick Create page

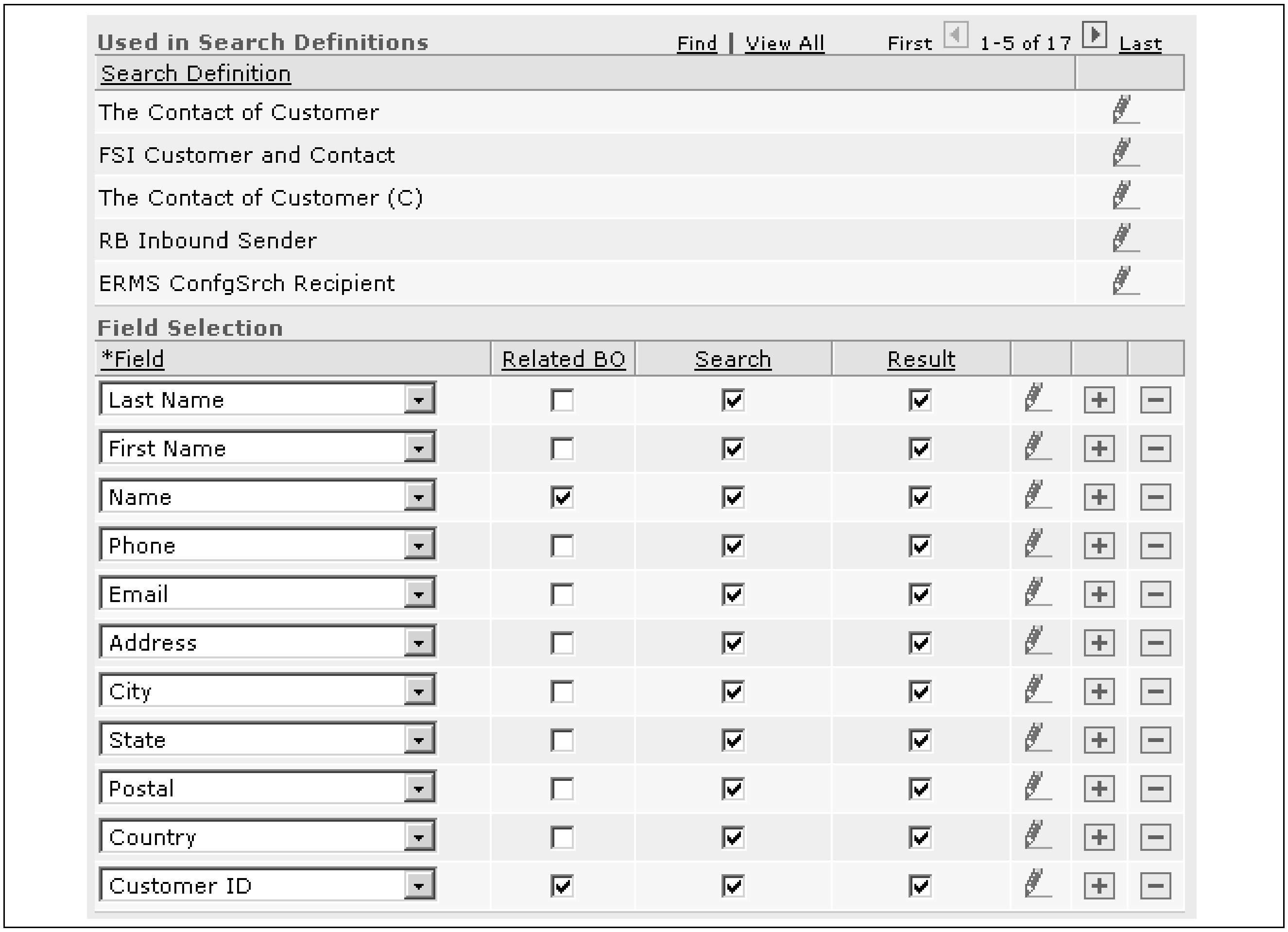
Quick Create Template	Select one or more templates to associate with the definition.
Primary Indicator	Select to indicate that the template is the primary, or controlling, template used by the quick create definitions. Primary templates appear first on the runtime Quick Create page.

Associating Search Fields with a Role Type

Access the Search Role page.



Search Role page (1 of 2)



Used in Search Definitions Find | View All First 1-5 of 17 Last

Search Definition	
The Contact of Customer	
FSI Customer and Contact	
The Contact of Customer (C)	
RB Inbound Sender	
ERMS ConfgSrch Recipient	

Field Selection

*Field	Related BO	Search	Result			
Last Name	☐	☑	☑		+	−
First Name	☐	☑	☑		+	−
Name	☑	☑	☑		+	−
Phone	☐	☑	☑		+	−
Email	☐	☑	☑		+	−
Address	☐	☑	☑		+	−
City	☐	☑	☑		+	−
State	☐	☑	☑		+	−
Postal	☐	☑	☑		+	−
Country	☐	☑	☑		+	−
Customer ID	☑	☑	☑		+	−

Search Role page (2 of 2)

General Options

Enter information that describes the role and how it appears.

Relationship Type and **Relationship Type 2**
: Select a relationship type. All relationship types that apply to the role appear in these drop down lists. The one that you select is used to filter the search results.

Apply SetID Security
: Select the options that determine how setID security is applied.

If you do not specify a relationship for the role, this field is a check box that you either select or not.

If you specify a relationship for the role, you have the options to apply SetID security to the primary, related, both, or neither business object in the relationship.

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

Apply Application Security, Apply Controlling BO, and **Apply Filter BO**
: Select the options that determine whether application security, controlling BO, and filter BO are applied to the primary or related business object in the relationship. If you do not specify a relationship, these options are not available.

Filter Record
: Enter the name of a record that is used to filter the search results.

Used in Search Definitions

A list of all search definitions that use the role appears here.

Field Selection

Add fields that the role can search.

Related BO

Select if the field is a field of a related BO.

For example, for the Contact search role, you can check the Company Name field as a related BO because the field belongs to the company record and not the contact record.

Search

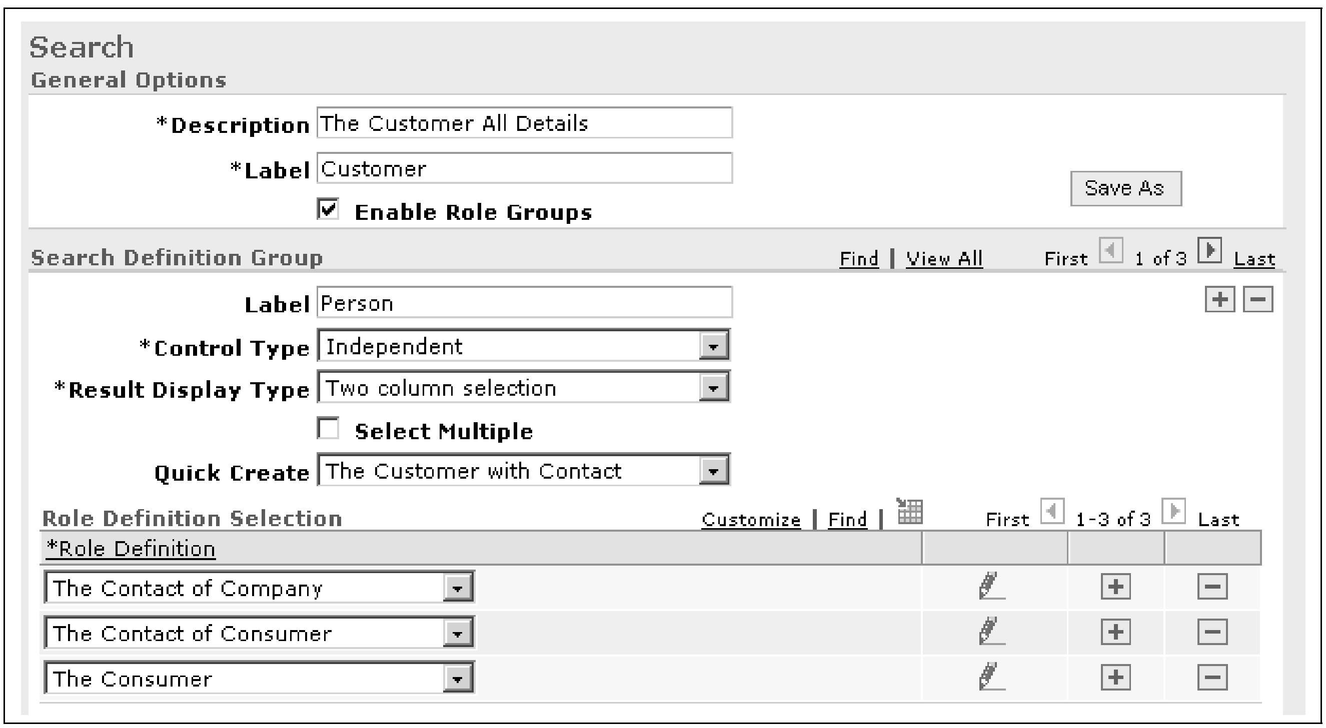
Select to use this field as a search criterion.

Search Result

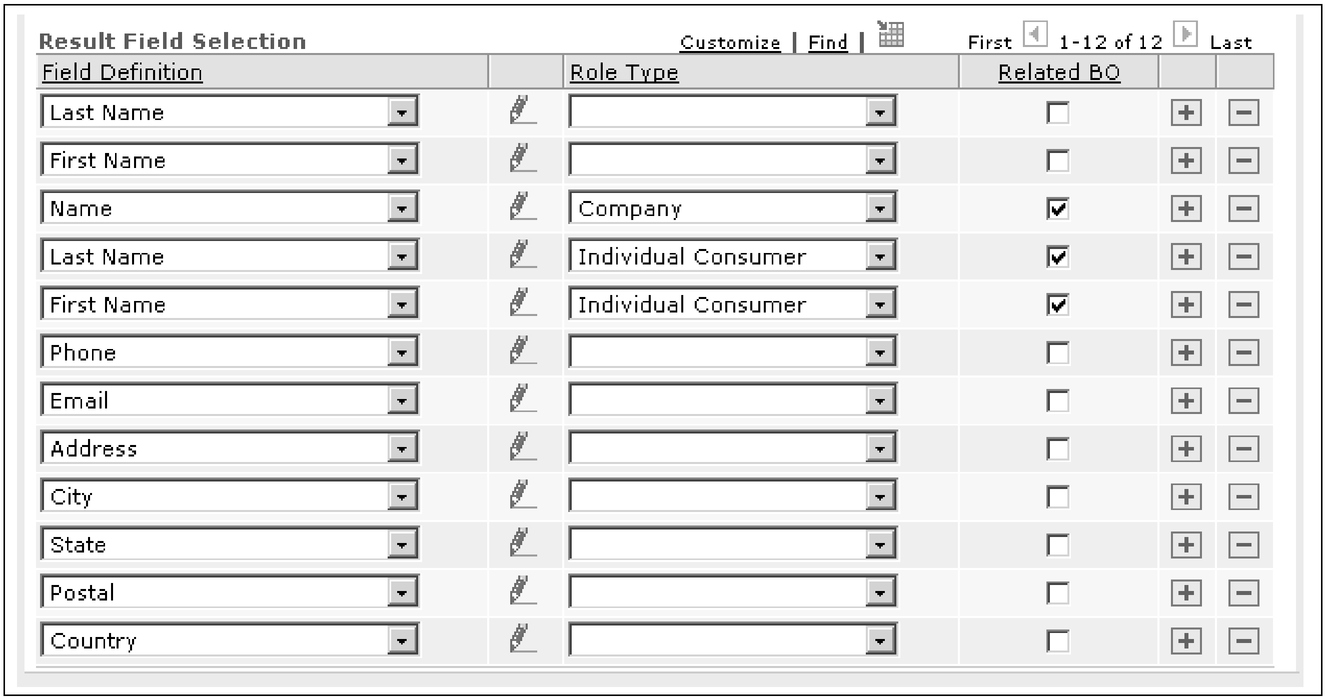
Select for this field to appear in the search results.

Defining BO Searches

Access the Search page.



Search page (1 of 2)



Search page (2 of 2)

Enable Role Groups Select to group the search results by role. For example, the Company, Site, and Alternate Capacity roles are grouped in the Organization group and the Consumer, Contact of Company, Contact of Consumer, Worker roles are grouped in the Individual group.

Note. The appearance of this page changes when you select this check box. Two additional page regions, Search Definition Group and Field Selection appear.

Search Definition Group

Control Type Indicate if the role group is *Controlling, Independent,* or *Dependent.*

Results appear with the controlling role first, followed by all dependent group records that are associated with the controlling group. For example, this enables users to display organizations first, then all the individuals that are associated with the organization. You can only have one*Controlling* group.

Result Display Type Indicate whether the results appear in one column or two column format.

Select Multiple Select to enable the user to choose multiple records from the result set.

Quick Create Definition Select the quick create definition to associate with the role.

Role Definition

Select one or more roles for the search definition, define their appearance in results, and associate them with quick create definitions.

Role Definition Select one or more search roles to associate with the search definition.

Result Field Selection

This page region appears when you select Enable Role Groups. If you associate more than one role definition to a search, then you must enter field definitions. This is necessary because two or more roles can use the same field definition. You must indicate to which role the field pertains.

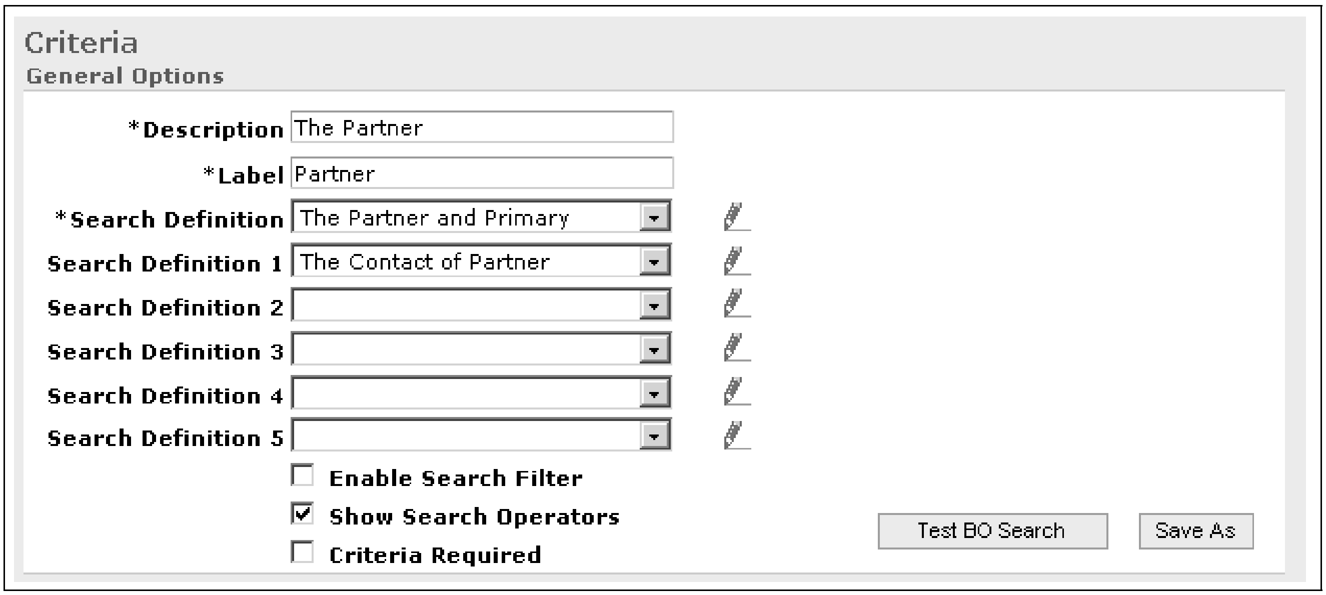
Field Definition Select the name of the field definition.

Role Type Select the role type to associate with the field definition.

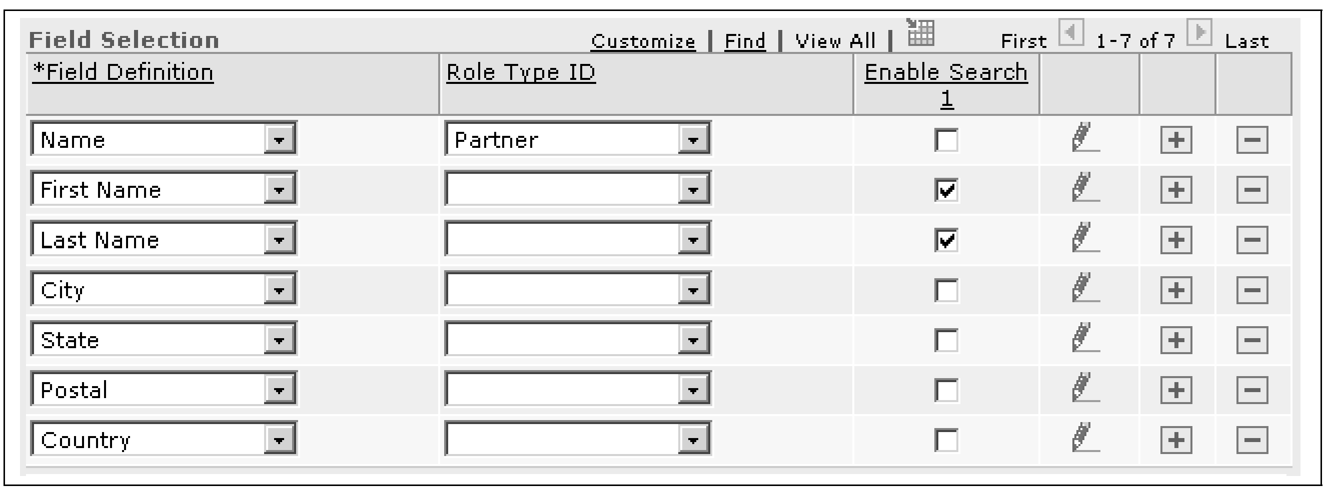
Related BO Select to indicate that the field definition is associated with a BO that is related to the primary BO that is the target of the search definition.

Defining Search Criteria Fields

Access the Criteria page.



Criteria page (1 of 2)



Criteria page (2 of 2)

This page captures information about the search definitions to invoke when the user enters certain fields.

Description	Enter the name for the group of criteria that you specify. This name is used to link the criteria to an adapter section.
Search Definition	Enter the default search definition. The definition is used by default when the user searches for a field
Search Definition 1, Search Definition 2,Search Definition 3, Search Definition 4 and **Search Definition 5**	Enter alternate search definitions. These search definitions appear at runtime. The user can search by the default definition or select an alternate.
Enable Search Filter	Select to have only the search fields that are associated with the selected search definition appear at runtime.
Show Search Operators	Select to have the search operators appear on the BO Search page at runtime.
Criteria Required	Select to require the user to enter search criteria at runtime before searching.

Field Selection

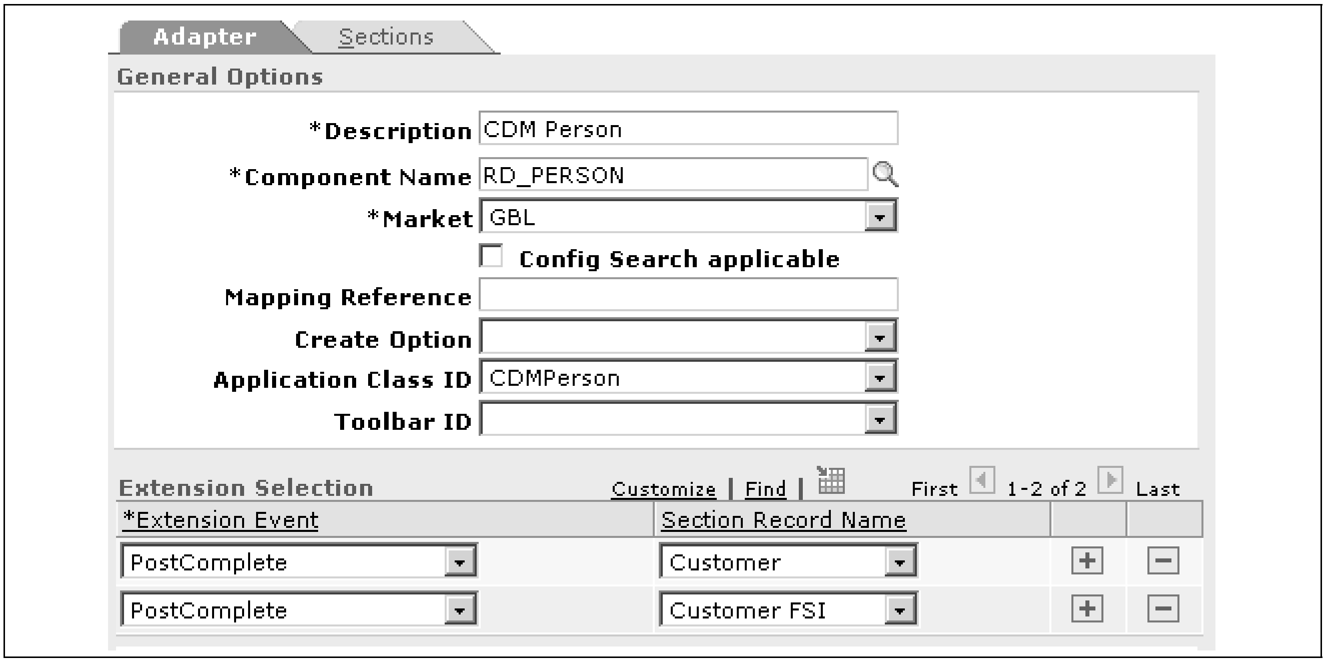
Use this page region to select fields for a search criteria definition, specify the roles for which the field appears, and select the search definitions for which the field is enabled.

Role Type ID	Select the role to which the field applies, in the case where a field is shared by different roles. For example, if the Name field is shared between the Company and Site roles. To have it appear once as *Company Name* and once as *Site Name*, you need to select the Name field twice and associate one to the Company role and one to the Site role.
Enable Search 1, Enable Search 2,Enable Search 3,Enable Search 4 and **Enable Search 5**	Select to enable the corresponding search definition for the field. For example, if you enable Search 1 and Search 3 for a field, then these search definitions appear in a drop down list at runtime. The user can select a search definition or search by the default definition.

Note. If you select a field for multiple roles, at runtime the field appears once in the search criteria for each role selected. You can specify different field labels for each role to differentiate between multiple occurrences.

Specifying Basic Search Criteria Fields

Access the Adapter page.



Adapter page

Component Name Specify the component to which this adapter definition pertains.

Market Select the market to which this adapter definition pertains.

Application Class ID Select the application class for the adapter.

Mapping Reference Enter a reference that is used to switch adapters if more than one adapter is needed for a component.

Extension Selection

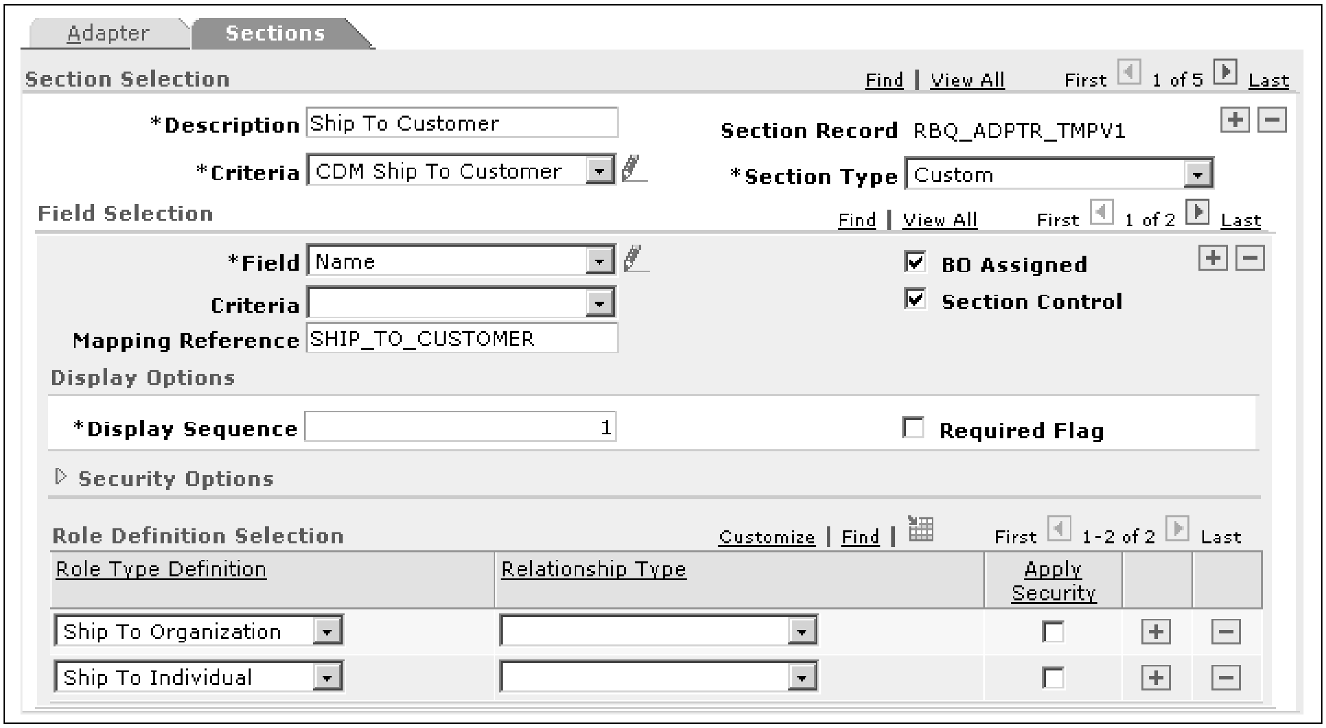
Extension Event Code Select a method from the list that appears.

This list contains the methods of the selected application class. You can use these to write custom code.

Section Record Name Enter the section to which this extension applies.

Defining Fields for Transaction Subpages

Access the Sections page.



Sections page

Note. Before you configure the transaction adapter for fields, make sure that you have an extensive understanding of system data and transactions.

Section Record Name This is the name of the record that is used as the subpage on the transaction.

Criteria Select the criteria definition that is used by this section.

Adapter Section Test Click to test the adapter section.

You cannot use this button to test sections that have a display type of *Custom*.

Field Selection

Field Definition Add the fields that you want to appear on the transaction.

BO Assigned Select to indicate that this field is associated to a primary BO on this section.

Section Identified Select to change the display state of the section is from initialized mode to identified mode when the value for the field is retrieved.

Criteria Select to use a value that is identified for the field as a criteria for additional searches.

For example, when a company is identified at runtime, a prompt button with a search for contact appears. When the user clicks the prompt, the system invokes the search definition that you specify in this field.

Mapping Reference Enter the logical name of the field on the transaction's component buffer.

Display Options

Specify how the field appears in initialized mode and identified mode. Initialized mode refers to how the field appears when the page is first displayed and before any criteria are entered. Identified mode refers to how the field appears after the fields are populated with the search results.

CHAPTER 15

Defining Ad Hoc Business Objects

This chapter provides an overview of ad hoc business objects and discusses how to define ad hoc business objects.

Understanding Ad Hoc Business Objects

The business object types that the PeopleSoft system delivers are sufficient to process all transactions in the delivered PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM) system. To meet additional business requirements, you can define ad hoc business objects. You define and manage ad hoc business objects in the Business Object component.

Before you can add an ad hoc business object to the system, you must define control values for the object. Ad hoc business objects use the same controls as delivered business objects: business object types, name types, role types, and relationship types.

Note. You use the same pages to define and maintain control information for ad hoc business object that you use to maintain controls for business object types, such as company, site, and person, that are delivered with PeopleSoft Enterprise CRM.

You can also use the relationship viewer in the Business Object component to maintain names, roles, and relationships for the business objects that you maintain in delivered PeopleSoft Enterprise CRM components (Company, Site, and Person). For example, to add the broker role to a contact, you would search for the contact by name and access the Relationship Viewer page. To create these roles and relationships, you must first set up the appropriate control values and configure a relationship view to recognize this type of relationship.

See Also

Chapter 2, “Understanding Business Object Relationship Model Components,” page 7

Chapter 3, “Defining Control Values for Business Objects,” page 13

Defining Ad Hoc Business Objects

To define ad hoc business objects, use the Business Object (BO) component.

This section discusses how to:

- Maintain name information.
- View and maintain ad hoc business object relationships.

See Also

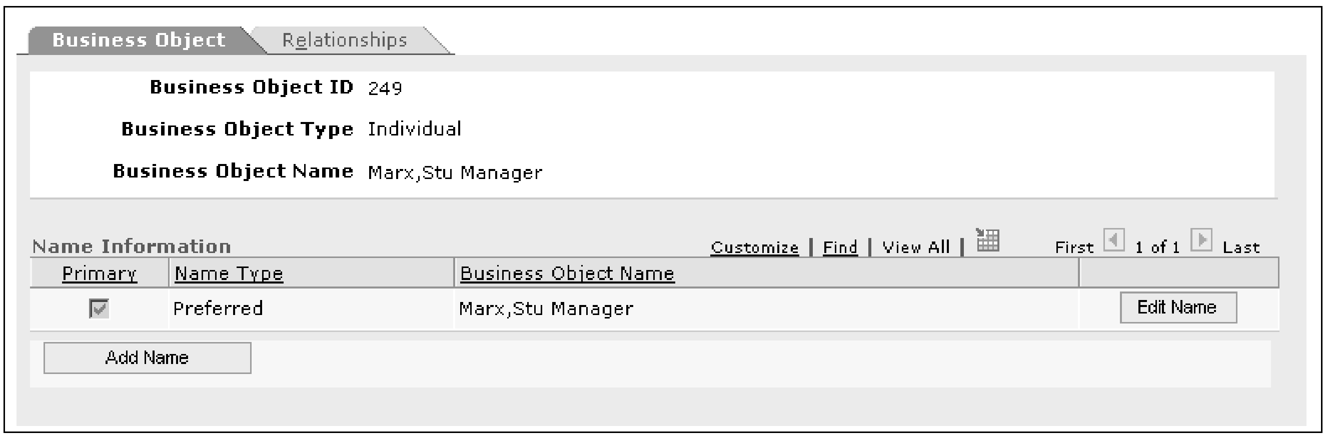
Chapter 7, "Working with the Relationship Viewer," page 93

Pages Used to Define Ad Hoc Business Objects

Page Name	Object Name	Navigation	Usage
Business Object - Business Object	BO	Customers CRM, Business Object, Business Object	Maintain name information for ad hoc business objects.
Business Object - Relationships	BO_REL	Customers CRM, Business Object, Relationships	View and maintain ad hoc business object relationships.

Maintaining Name Information

Access the Business Object - Business Object page.



Business Object - Business Object page

Name Type Displays the business object type.

See Chapter 3, "Defining Control Values for Business Objects," Defining Business Object and Name Types, page 20.

Viewing and Maintaining Ad Hoc Business Object Relationships

Access the Business Object - Relationships page.

See Chapter 7, "Working with the Relationship Viewer," page 93.

PART 6

Customer and Worker Data Integrations

CHAPTER 16

Managing Enterprise Integration for PeopleSoft Enterprise CRM

This chapter provides overviews of enterprise integration technology and data integrations in PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM) and discusses how to:

- Set up defaults for interfacing customer and contact information.
- Market-enable Company, Consumer, Site, and Contact EIPs.
- Establish master ID databases.
- Map message data to PeopleSoft Enterprise CRM records and fields.

Understanding Enterprise Integration Technology

This section discusses:

- Enterprise integration points (EIPs) in PeopleSoft Enterprise CRM
- PeopleSoft Enterprise CRM Foundation EIPs
- Application Messages
- Data Mapping for Application Messages

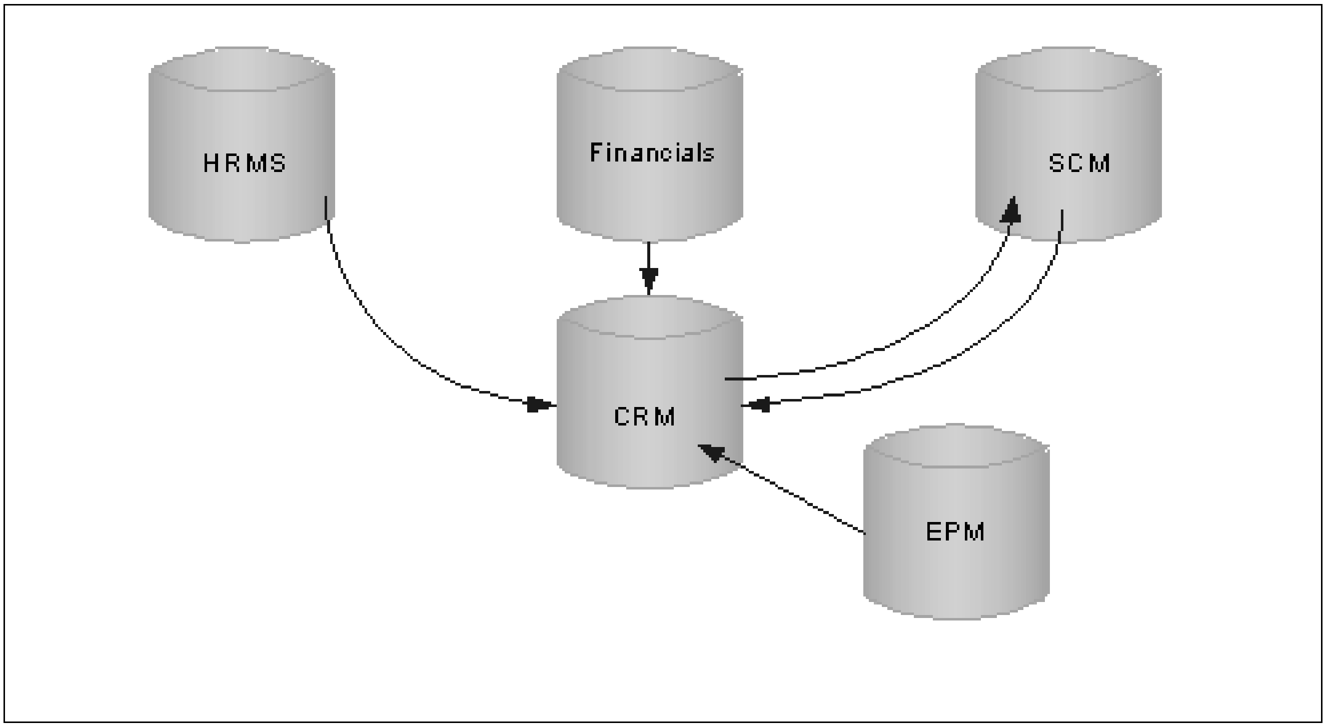
EIPs in PeopleSoft Enterprise CRM

PeopleSoft Enterprise CRM provides many ways of integrating with other PeopleSoft applications as well as third-party systems. PeopleSoft Enterprise CRM applications collaborate to manage and share data across your enterprise — from managing customers and workers to tracking inventory.

PeopleSoft Enterprise CRM uses EIPs to integrate with:

- PeopleSoft applications outside of CRM.
- Third-party applications.

This diagram illustrates how PeopleSoft Enterprise CRM collaborates with other PeopleSoft applications to manage and share data across your enterprise:



Enterprise Integration Between PeopleSoft Databases

PeopleSoft Enterprise CRM integrates with:

- PeopleSoft HRMS, which publishes employee and workforce data to the CRM database.
- PeopleSoft Financial Management Solutions and PeopleSoft Supply Chain Management (PeopleSoft SCM) for customer, contact, and product information.

  This is a two-way integration.
- PeopleSoft Enterprise Performance Management (PeopleSoft EPM), which publishes the data mining results from Customer Behavior Modeling for use in PeopleSoft Enterprise CRM.

By taking advantage of the integration technology that PeopleSoft delivers and the existing integrations with PeopleSoft HRMS, PeopleSoft Financial Management Solutions, and PeopleSoft SCM, you can integrate with other third-party systems. PeopleSoft Enterprise CRM achieves integration using Application Messaging, Business Interlinks, and the PeopleTools Integration Broker technology.

PeopleSoft Enterprise CRM offers many ways of integrating with third-party applications. For example, if you send or publish a message to a third-party system, the PeopleSoft system structures the data into a message and automatically delivers it to the destination location. You can also accept or subscribe to messages from third-party systems. The PeopleSoft system validates incoming data, checking for errors before updating the system of record.

You can also send a synchronous request or reply transaction to a third-party system for processing and receive a real-time response.

See Also

PeopleSoft Integration Broker

PeopleSoft Integration Tools and Utilities

PeopleSoft Business Interlink Application Developer Guide

PeopleSoft Enterprise CRM Foundation EIPs

This table lists the EIPs that PeopleSoft delivers for foundation PeopleSoft Enterprise CRM:

EIP Name	Description	Message Name	Direction of Integration	Technology
CUSTOMER	Customer information is retrieved to PeopleSoft Enterprise CRM from other external systems.	CUSTOMER_SYNC CUSTOMR_FULLSYNC_EFF	PeopleSoft Enterprise CRM <— > SCM/external system	Application Message
CUSTOMER_COMPANY	Synchronizes company information with other systems.	CUST_COMPANY_FULLSYNC CUST_COMPANY_FULLSYNC_EFF CUST_COMPANY_SYNC CUST_COMPANY_SYNC_EFF	PeopleSoft Enterprise CRM < — > SCM/external system	Application Message
CUSTOMER_CONSUMER	Synchronizes consumer information with other systems.	CUST_CONSUMER_FULLSYNC CUST_CONSUMER_FULLSYNC_EFF CUST_CONSUMER_SYNC CUST_CONSUMER_SYNC_EFF	PeopleSoft Enterprise CRM < — > SCM/external system	Application Message
CUSTOMER_SITE	Synchronizes site information with other systems.	CUST_SITE_FULLSYNC CUST_SITE_FULLSYNC_EFF CUST_SITE_SYNC CUST_SITE_SYNC_EFF	PeopleSoft Enterprise CRM < — > SCM/external system	Application Message
WORKER	Synchronizes worker information with other systems.	WORKER_FULLSYNC WORKER_FULLSYNC_EFF WORKER_SYNC WORKER_SYNC_EFF	PeopleSoft Enterprise CRM < — > PeopleSoft HCM/third-party HRMS system	Application Message

EIP Name	Description	Message Name	Direction of Integration	Technology
CUSTOMER_CONTACT	Synchronizes contact information with other systems.	CONTACT_SYNC CONTACT_SYNC_EFF CONTACT_FULLSYNC CONTACT_FULLSYNC_EFF	PeopleSoft Enterprise CRM < — > SCM/external system	Application Message
PARTNER_PROFILE	Synchronizes partner program information with other systems.	PARTNER_PROFILE_SYNC PARTNER_PROFILE_FULLSYNC	PeopleSoft Enterprise CRM < — > SCM/external system	Application Message
BUSINESS UNIT TABLE FS	Synchronizes financial business unit data.	BUS_UNIT_FS_FULLSYNC BUS_UNIT_FS_SYNC	PeopleSoft Enterprise CRM < — > SCM	Application Message
TABLE SET CONTROL	Synchronizes setID data.	SETID_INITIALIZE	PeopleSoft Enterprise CRM < — > SCM	Application Message
COUNTRY TABLE	Synchronizes country codes and address data to an external system.	COUNTRY_FULLSYNC COUNTRY_SYNC	PeopleSoft Enterprise CRM < — > SCM/HRMS /External system	Application Message
STATE TABLE	Synchronizes state name, description, and abbreviation information with an external system.	STATE_FULLSYNC STATE_SYNC	PeopleSoft Enterprise CRM < — > SCM/HRMS /external system	Application Message
UNIT OF MEASURE	Synchronizes units of measure with an external system.	UOM_FULLSYNC UOM_SYNC	PeopleSoft Enterprise CRM < — > SCM/HRMS /external system	Application Message
CURRENCY CODE TABLE	Transmits currency code data.	CURRENCY_FULLSYNC CURRENCY_SYNC	PeopleSoft Enterprise CRM < — > SCM/external system	Application Message

EIP Name	Description	Message Name	Direction of Integration	Technology
MARKET RATES DATA	Imports and synchronizes updated market rates.	CURR_QUOTE_MTHD_ FULLSYNC CURR_QUOTE_MTHD_ SYNC MARKET_RATE_DEFN_ FULLSYNC MARKET_RATE_DEFN_ SYNC MARKET_RATE_ FULLSYNC MARKET_RATE_SYNC MARKET_RATE_LOAD MARKET_RATE_INDEX_ FULLSYNC MARKET_RATE_INDEX_ SYNC MARKET_RATE_TYPE_ FULLSYNC MARKET_RATE_TYPE_ SYNC	PeopleSoft Enterprise CRM < — > SCM/HRMS /external system	Application Message
DEPARTMENT TABLE	Synchronizes departments across the enterprise.	DEPT_FULLSYNC DEPT_SYNC	PeopleSoft Enterprise CRM < — > SCM/HRMS /external system	Application Message
LOCATION TABLE	Synchronizes location table data across the enterprise.	LOCATION_FULLSYNC LOCATION_SYNC	PeopleSoft Enterprise CRM < — > SCM/HRMS /external system	Application Message
PRODUCT	Synchronizes product information with PeopleSoft SCM or third-party external systems.	PRODUCT_FULLSYNC PRODUCT_SYNC PRODUCT_GROUP_ FULLSYNC PRODUCT_GROUP_SYNC PRODUCT_SYNC_EFF	PeopleSoft Enterprise CRM < — > SCM/external system	Integration Broker

EIP Name	Description	Message Name	Direction of Integration	Technology
COMPETENCY TYPE	Receives competency information from PeopleSoft HRMS.	CM_TYPE_FULLSYNC CM_TYPE_SYNC	PeopleSoft Enterprise CRM < — > HRMS	Application Message
COMPETENCY TABLE	Receives competency and accomplishment details from PeopleSoft HRMS.	COMPETENCY_ FULLSYNC1 COMPETENCY_SYNC1	PeopleSoft Enterprise CRM < — > HRMS	Application Message
PERSON COMPETENCY	Receives a person's competency data from PeopleSoft HRMS.	PERSON_COMPETENCY_ FULLSYNC PERSON_COMPETENCY_ SYNC	PeopleSoft Enterprise CRM < — > HRMS	Application Message
RATING MODEL	Receives rating model data from PeopleSoft HRMS.	RATING_MODEL_ FULLSYNC RATING_MODEL_SYNC	PeopleSoft Enterprise CRM < — > HRMS	Application Message
PERSONAL DATA	Synchronizes personal data from PeopleSoft HRMS.	PERSON_BASIC_ FULLSYNC PERSON_BASIC_SYNC	PeopleSoft Enterprise CRM < — > HRMS	Application Message
WORKFORCE DATA	Synchronizes workforce data from PeopleSoft HRMS.	WORKFORCE_FULLSYNC WORKFORCE_SYNC	PeopleSoft Enterprise CRM < — > HRMS	Application Message
CALENDAR /TASK	Fully synchronizes the calendar with Outlook, Lotus Notes, or other personal information manager (PIM).	PIM_CONTACT_SYNC	PeopleSoft Enterprise CRM < — > Outlook/PIM	Application Message
CUSTOMER GROUP	Synchronizes customer groups.	CUSTOMER_GROUP_ FULLSYNC CUSTOMER_GROUP_ SYNC	PeopleSoft Enterprise CRM < — > SCM	Application Message

EIP Name	Description	Message Name	Direction of Integration	Technology
REPRESENTATIVE	Synchronizes representative data with PIM.	PIM_CONTACT_SYNC REP_SYNC	PeopleSoft Enterprise CRM < — > Personal Information Manager (PIM)	Application Message
PS GETID	Retrieves customer IDs and contact IDs from other PeopleSoft systems.	PSGETID	PeopleSoft Enterprise CRM < — > SCM	XML link
GET CUSTOMER VALUE	Retrieves customer value /KPI information from PeopleSoft EPM and updates the BC (Business Contact) and the RB_CLAF_ EPM_KIP (Key Performance Indicator) tables in the PeopleSoft Enterprise CRM database.	KP_KPI_ASMT_FACTS	PeopleSoft Enterprise CRM < — > EPM	Application Message

EIP Name	Description	Message Name	Direction of Integration	Technology
GET BILLS FOR 360 DEGREE VIEW	• Requests billing information (bills) from PeopleSoft Billing to display in the 360-Degree View. • PeopleSoft Billing responds with the billing information that is requested from the PeopleSoft Enterprise CRM 360-Degree View.	• BI_EIP360_REQ • BI_EIP360_RSP	• PeopleSoft Enterprise CRM < — > SCM • PeopleSoft Enterprise CRM < — > SCM	• Application Message • Application Message
GET ACCOUNT RECEIVABLES FOR 360 DEGREE VIEW	• Requests payment information (payments) from PeopleSoft Receivables to display in the 360-Degree View. • PeopleSoft Receivables responds with the payment information that is requested from the PeopleSoft Enterprise CRM 360-Degree View.	• AR_CRM_REQUEST • AR_CRM_RESPONSE	• PeopleSoft Enterprise CRM < — > Financial Management Solutions • PeopleSoft Enterprise CRM < — >Financial Management Solutions	• Application Message • Application Message

EIPs that support particular business processes and applications are documented in other PeopleSoft Enterprise CRM PeopleBooks. The online EIP Catalog database lists, with technical details, the EIPs that PeopleSoft Enterprise CRM uses.

See Also

PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook, “Integrating with Fulfillment and Billing Systems”

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, “Integrating with PeopleSoft Applications”

The EIP catalog on the PeopleSoft Customer Connection website.

Application Messages

EIPs that publish data to another database are available as both FULLSYNC and SYNC messages. FULLSYNC messages are designed for use at implementation time for setup information. Once a table has been set up, the SYNC messages allow for updates to that data.

Important! Some FULLSYNC messages are designed to fully replace the data through the use of the header message. To avoid losing existing data, turn off the header — the message refreshes the data by updating the existing data and adding any missing data.

Application Message Setup

As delivered, PeopleSoft EIP application messages are inactive.

To set up a delivered application message:

1. Activate the application message.
2. For inbound messages, activate the message subscription PeopleCode.
3. Set the associated message channel to Run mode.
4. Configure an existing message node or define a new message node.
5. Define asynchronous or synchronous transactions on the message node.
6. Define relationships to reconcile transaction parameters for routing, transmission type, message structure, or message content, if necessary.

See *PeopleSoft Integration Broker*

Data Mapping for Application Messages

PeopleSoft Enterprise CRM has the capability of subscribing to other PeopleSoft-application or third-party-application messages. Before PeopleSoft Enterprise CRM can subscribe to a PeopleSoft EPM message or any third-party message, data mapping must occur between the source format and the destination format. To accommodate this data mapping, PeopleSoft Enterprise CRM created a Data Mapping component. Using this component, you can perform data mapping for any single-level hierarchical message.

The integration between PeopleSoft EPM and CRM is currently the one place that uses this data mapping component. Before PeopleSoft Enterprise CRM can receive key performance indicator (KPI) information through the KP_KPI_ASMT_FACTS application message from EPM, the application message data must be mapped to data fields that the CRM system recognizes. To assist with this integration, PeopleSoft provides a predefined data mapping structure sample.

Alternatively, data is inserted into RB_CLAF_EPM_KPI table via the KP_KPI_EPM terms subscription. This subscription creates terms for the Active Analytics Framework.

This table shows the predefined data mapping structure sample that PeopleSoft delivers to assist with integration between PeopleSoft Enterprise CRM and EPM:

Message Name	Record to Update	Fields to Update Field/XML Tag	Record Identification Field/XML Tag	Message Row Identification XML Tag Name/XML Tag Value
KP_KPI_ASMT_ FACTS	BC	• ASSESS_DESCR /ASSESSS DESCR • ASSESS_ID /ASSESS_ID • ASSESS_ IMAGE_ID /ASSESS_ IMAGE_ID • KPI_ID/KPI_ID • PCT_OF_ TARGET/PCT_ OF_TARGET • RESOLVED_ VALUE /RESOLVED_ VALUE	CUST_ID/OBJ_ID	PF_OBJECT_ TYPE /CUSTOMER MASTER

See Also

Chapter 8, “Defining Company Business Objects ,” Defining Company Information , page 108

Chapter 10, “Defining Person Business Objects,” Defining Person Information, page 132

Chapter 16, “Managing Enterprise Integration for PeopleSoft Enterprise CRM ,” Mapping Message Data to PeopleSoft Enterprise CRM Records and Fields, page 294

Data Integrations

This section discusses:

- Integration with PeopleSoft HRMS or third-party HRMS.
- Customer and contact data integration.
- Worker data integration.
- Product data integration.
- Bill and payment data integration.
- Other integration considerations.

Integration with PeopleSoft HRMS or Third-Party HR Data

You use three EIP groups to integrate PeopleSoft Enterprise CRM with a PeopleSoft HRMS system or another third-party HR system: Person Basic, Workforce, and Person Competencies. Each group requires that you run additional supporting EIPs, and must be processed in a particular sequence.

These EIPs are available as both FULLSYNC and SYNC messages. PeopleSoft recommends that you perform FULLSYNC messages at implementation time to set up your PeopleSoft Enterprise CRM database correctly.

To set up your database with FULLSYNC messages (recommended sequence):

1. Before you run the main EIPs, run these common EIPs:
    a. Country
    b. State
    c. Currency
    d. SetID Initialization
    e. Table Set Control Initialization
    f. Location
    g. Business Unit
2. Run the Person Basic EIP.
3. Run the Workforce EIP group.
    a. Department
    b. Job Code
    c. Workforce
4. Run the Person Competencies EIP group.
    a. CM_TYPE
    b. Rating Model
    c. Competency
    d. Person Competency
5. Inactivate the FULLSYNC messages and activate the corresponding SYNC messages.

SYNC messages always originate in PeopleSoft HRMS or a third-party system and publish to PeopleSoft Enterprise CRM. Thus, any field in PeopleSoft Enterprise CRM that an EIP populates must be maintained from the originating source database, whether it is PeopleSoft HRMS or a third-party system.

Note. If you create workers within PeopleSoft Enterprise CRM, you must maintain these workers in CRM until you create them in an HRMS or third-party database.

Personal Data

PeopleSoft Enterprise CRM subscribes only to this subset of personal data:

- Worker’s physical address (addresses with the address type Mailing).
- Worker’s email address (email addresses that do not have an email type of Home).
- Worker’s phone number (phone numbers that do not have a phone type of Home).

Job Code Data

PeopleSoft Enterprise CRM subscribes only to the primary job information for the current effective row for a worker. All fields (except for Physical Location) in the Worker component are updated from PeopleSoft HRMS.

Customer and Contact Data Integration

In PeopleSoft Enterprise CRM, a *customer* can be either a company, a partner company, a consumer, or a site that is associated with a company or consumer. A *contact* is any person who performs transactions on a customer's behalf.

Company, Consumer, Site, and Contact EIPs

Use the CUSTOMER_COMPANY, CUSTOMER_CONSUMER, and CUSTOMER_SITE EIPs to synchronize customer information with other systems. When you implement these EIPs, application messages are published whenever a company, partner company, consumer, or site record in the PeopleSoft Enterprise CRM system is added or modified. PeopleSoft Enterprise CRM can also subscribe to these EIP application messages that are published when these records are modified in another system.

The PARTNER_PROFILE EIP is triggered when you update data for a company that has the Partner role. It publishes an application message whenever a partner record is added or modified. The data in This EIP contains only information that is specific to the Partner role. The CUSTOMER_COMPANY EIP is also published to synchronize the basic company information.

The CUSTOMER_CONTACT EIP enables you to synchronize customer contact information with another system. When you implement the CUSTOMER_CONTACT EIP, application messages are published when a contact record in the PeopleSoft Enterprise CRM system is added or modified. CRM can also subscribe to CUSTOMER_CONTACT EIP application messages that are published when these records are modified in another system.

Important! You must market-enable the Company, Consumer, Site, Partner Profile, and Contact EIPs before PeopleSoft Enterprise CRM can send customer (company, partner profile, consumer, and site) and contact data to other databases. Market-enabling enables you to specify what data the PeopleSoft Enterprise CRM system sends to other systems for a specific market. For example, you might opt not to publish certain customer and contact data to an external system for the FSI market. At the minimum, you must specify a global market to interface all non-market specific data.

See Chapter 16, "Managing Enterprise Integration for PeopleSoft Enterprise CRM ," Market-Enabling Company, Consumer, Site, and Contact EIPs, page 290.

Partner Profile EIP

This EIP is triggered when you update data for a company that has the Partner role.

See *PeopleSoft Enterprise Partner Relationship Management 8.9 PeopleBook.*

Site Considerations

Only CRM sites that are flagged with the bill-to or sold- to purchasing options are integrated as customers with PeopleSoft SCM. If a site is flagged as Ship To only then the site is integrated with PeopleSoft SCM as an address to the company with which the site is associated.

When you add the bill-to or sold-to flag to a ship-to site, the system publishes the site message to create a new customer in PeopleSoft SCM. However, if a customer already exists in PeopleSoft SCM, removing the bill-to and sold-to options from the site does not remove the customer information for that site in PeopleSoft SCM.

Specifying Customer ID and Contact ID Default Values

You must specify the system that owns the customer ID and contact ID and verify the automatic numbering for ID generation for each setID.

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

Customer and Contact Integration with Other PeopleSoft Applications

Unlike PeopleSoft Enterprise CRM, PeopleSoft Financial Management Solutions and PeopleSoft SCM do not distinguish between company, consumer, and site records. CUSTOMER_COMPANY, CUSTOMER_CONSUMER, and CUSTOMER_SITE EIP application messages to which these systems subscribe are all mapped to customer records with unique customer IDs in the PeopleSoft Financial Management Solutions and PeopleSoft SCM systems.

When customer records are added or modified in PeopleSoft Financial Management Solutions and PeopleSoft SCM, the system publishes application messages using the Customer EIP. These messages are mapped to companies in the PeopleSoft Enterprise CRM system.

When a record that is created in PeopleSoft Enterprise CRM is modified in PeopleSoft Financial Management Solutions and PeopleSoft SCM, the system uses the record key information (customer ID and setID) that is included in the application message that's reporting the change to derive the record's original business object ID in PeopleSoft Enterprise CRM. This enables CRM to apply the changes that are reported in the application message to the corresponding company, consumer, or site record.

To ensure uniqueness of customer ID and contact ID between multiple PeopleSoft Enterprise CRM databases, you must specify the system that owns the customer ID and contact ID and verify the automatic numbering for ID generation for each setID.

See Chapter 16, "Managing Enterprise Integration for PeopleSoft Enterprise CRM ," Establishing Master ID Databases, page 292.

Note. The CUSTOMER_COMPANY, CUSTOMER_CONSUMER, CUSTOMER_CONTACT, and CUSTOMER_SITE EIPs enable you to maintain customer information in multiple databases. However, to simplify integration of customer information, choose one database as the system of record for customer maintenance, and use PeopleTools portal technology to support customer information inquiries from the other systems. If you maintain customer and contact information in multiple databases, you must consider additional design, planning, and integration steps.

Customer and Contact EIP Application Messages Processing Order

In PeopleSoft Enterprise CRM, because contacts can be associated with a company, consumer, or site, the company, consumer, or site record should be created before the contact record. When you implement the CUSTOMER_COMPANY, CUSTOMER_CONSUMER, CUSTOMER_CONTACT, and CUSTOMER_SITE EIPs, make sure that the application messages from the CUSTOMER_COMPANY, CUSTOMER_CONSUMER, and CUSTOMER_SITE EIPs are processed before application messages from the CUSTOMER_CONTACT EIP when performing a FULLSYNC process.

Maintaining Customer and Contact Information in Different Databases

In PeopleSoft, customers exist in PeopleSoft Enterprise CRM, PeopleSoft SCM, and PeopleSoft Financial Management Solutions. There are a number of ways to design the system to integrate between PeopleSoft Enterprise CRM, PeopleSoft SCM, and PeopleSoft Financial Management Solutions. The simplest way to integrate customer master information is to manage all customer maintenance out of one database and support inquiry only on the other databases. Then you can use PeopleTools portal technology to access either system.

You might have a compelling business reason to maintain customer and contact information in different databases. For example, you may elect to have your front office users create customers in the PeopleSoft Enterprise CRM database but want to use the Receivables payment processing options that are available only in Financial Management Solutions.

If you choose to maintain customer (company, consumer, and site) and contact information in different databases, you must:

- Define which database owns the customer and contact ID number assignment on the Master ID DB Setup page.

  By specifying an owner, the system will be consistent in assigning a unique customer or contact ID for a particular customer or contact across different databases.

- Set up defaulting for the CRM Name Type field on the Name Type Defaults page.

  You cannot add new contacts or customers to the PeopleSoft Enterprise CRM database via the CUSTOMER_COMPANY, CUSTOMER_CONSUMER, CUSTOMER_CONTACT, and CUSTOMER_SITE EIPs unless you complete this step.

- Set up at least one PeopleSoft Enterprise CRM market control code for interfacing CRM customer and contact data to other databases.

- Evaluate whether you plan to define customers as bill-to customers in PeopleSoft Enterprise CRM.

  In PeopleSoft SCM and PeopleSoft Financial Management Solutions, customers that you define as bill-to customers must also have a defined collector and credit analyst. To ensure that PeopleSoft Enterprise CRM passes these required fields to PeopleSoft SCM and PeopleSoft Financial Management Solutions, select the Collector/Credit Analyst Req (collector/credit analyst required) check box on the Installation Setup table. This ensures that PeopleSoft Enterprise CRM satisfies the required field edit that is needed to populate PeopleSoft Financial Management Solutions and PeopleSoft SCM. Set up defaulting of these values on the Interface Defaults page under Define Integration Rules.

- Manually keep the Collector and Credit Analyst table in PeopleSoft Enterprise CRM in sync with the PeopleSoft Financial Management Solutions and PeopleSoft SCM Collector and Credit Analyst table.

- Establish a default support team code in PeopleSoft Enterprise CRM for each setID to be used in when creating a customer.

  In PeopleSoft SCM and PeopleSoft Financial Management Solutions, a default support team code is required for each customer. To satisfy the required field edit, PeopleSoft Enterprise CRM enables you to set up a default value on the Interface Defaults page under Define Integration Rules. In addition, ensure that the value setup on the Default page also exists on the PeopleSoft SCM and PeopleSoft Financial Management Solutions system.

PeopleSoft SCM and PeopleSoft Financial Management Solutions Customer-Related Pages That Are Unavailable in PeopleSoft Enterprise CRM

These pages in the PeopleSoft SCM or PeopleSoft Financial Management Solutions Customer component are not available in CRM:

- Vendor Info
- Credit Profile - General
- Credit Profile - Credit Check
- Region Code Info
- Subcustomer Info
- Customer Group Info
- Tax Exempt Certificate Info

- Customer VAT Info (customer value-added tax information)
- Customer Notes Info
- Attachments
- Messages
- User-Defined 1
- User-Defined 2
- Payment Options
- Write-Off Info
- Hierarchy
- Product Catalog
- Product Aliases
- Additional Ship To Options
- Ship Exception Dates
- Carrier Acct Number (carrier account number)

Note. If the PeopleSoft Enterprise CRM installation is integrated with either PeopleSoft SCM or PeopleSoft Financial Management Solutions, you can access these pages through those applications.

The Products component in PeopleSoft SCM and PeopleSoft Financial Management Solutions uses these customer components, which are not available in CRM:

- Dun & Bradstreet
- MICR Information
- Corporate Customer Tree
- Vendor Information
- Corporate Tree Messages
- Customer EFT Name (customer electronic funds transfer name)
- Quick Customer Create

Note. You can access these pages through PeopleSoft SCM or PeopleSoft Financial Management Solutions if the PeopleSoft Enterprise CRM installation is integrated with those systems.

See Also

Chapter 5, "Defining Purchasing Options for Companies, Consumers, and Sites," page 63

PeopleSoft Enterprise Components for CRM 8.9 PeopleBook

Worker Data Integration

Use the Worker EIP to synchronize worker information with another system. In PeopleSoft Enterprise CRM, workers are people who work for you. When you implement the Worker EIP, application messages are published when a worker record in the PeopleSoft Enterprise CRM system is added or modified. PeopleSoft Enterprise CRM can also subscribe to Worker EIP application messages that are published when these records are modified in another system. The Worker EIP enables PeopleSoft Enterprise CRM to accept and create future dated workers that were created in another system and to which CRM subscribed.

Product Data Integration

Integrate product data using the PeopleTools 8.4 Integration Broker. This technology enables both synchronous and asynchronous messages to be transmitted using one technology. The PRODUCT_SYNC and PRODUCT_FULLSYNC messages are used to both publish and subscribe to data between PeopleSoft Enterprise CRM and PeopleSoft SCM or a third-party system.

Integrating from PeopleSoft SCM to PeopleSoft Enterprise CRM

PeopleSoft Enterprise CRM subscribes asynchronously to the PRODUCT_SYNC message that is coming from PeopleSoft SCM. This data is processed directly into the PeopleSoft Enterprise CRM product tables using Component Interfaces (CIs).

A product package header record is added for any kit components that are received from PeopleSoft SCM.

Integrating from PeopleSoft Enterprise CRM to PeopleSoft SCM

PeopleSoft Enterprise CRM publishes the PRODUCT_SYNC message whenever product data is added, changed, or deleted via the Product Definition (PROD_DEFN), Product Package (PRODKIT_SUMMARY), Pricing (PROD_PRICE), Package Pricing (PRODKIT_COMPS_PRICE), Notes (PROD_NOTE), Relationships (PROD_RELATIONS_CMP), and Product Attributes by UOM (product attributes by unit of measure; PROD_UOM) pages.

The Integration Broker processes the message and applies a transformation to remove the PRODKIT_HEADER.

Any package components that are themselves packages are also stripped from the message.

Because PeopleSoft SCM does not allow packages within packages, package components that are themselves packages are also stripped from the message.

This table shows how an order represents packages to PeopleSoft SCM:

Type	Line Display	Line Data Model/EIP
0-Static Package (1-level static quantity) PROD_ITEM.PROD_KIT=Y PROD_KIT_HEADER.LT_ CONFIG_FLAG=N	Display all components of the package as multiple lines.	Store and publish parent line.

Type	Line Display	Line Data Model/EIP
1-Package (Kit) (multilevel dynamic quantity) PROT_ITEM.PROD_KIT=Y PROD_KIT_HEADER.LT_ CONFIG_FLAG=Y	Display all components of the package as multiple lines.	Store all components as multiple lines, and publish as multiple lines.
2-Configured Package(Kit) PROD_ITEM.PROD_KIT=Y PROD_ITEM.CFG_KIT=Y	Display all components of the package as multiple lines.	Store all components as multiple lines, and publish as multiple lines.
3-Configured Product MASTER_ITEM_TBL.DIST_ CFG_FLG=Y	Display high level parent line.	Store and publish parent line plus configuration.

Integrating from PeopleSoft Enterprise CRM to a third-party SCM database

PeopleSoft Enterprise CRM publishes the PRODUCT_SYNC message whenever product data is added, changed, or deleted via the Product Definition, Product Package, Pricing, Package Pricing, Notes, Relationships, and Product Attributes by UOM components. Integration Broker passes the message to the subscribing system.

Bill and Payment Data Integration

PeopleSoft Enterprise CRM integrates with Billing and Receivables to obtain billing information — invoices — and payments that are associated with a company, consumer, or contact. If a person is a contact of a company and that role is selected in the Role field in 360-Degree View, then the 360-Degree View EIPs retrieve invoices and payments for the company and not for the contact.

The PeopleSoft Enterprise CRM 360-Degree View can display invoices and payments under those nodes in the 360-Degree View tree. When you define these types of nodes on the Define Node page in PeopleSoft Enterprise CRM, you specify all of the necessary EIP details that are associated with that node.

To request invoices from PeopleSoft Billing, and for Billing to respond to the request, use the GET BILLS FOR 360 DEGREE VIEW EIP. This EIP consists of two application messages:

- BI_EIP360_REQ (request message)
- BI_EIP360_RSP (response message)

To request payments from PeopleSoft Receivables and for Receivables to respond to the request, use the GET ACCOUNT RECEIVABLES FOR 360 DEGREE VIEW EIP. This EIP consists of two application messages:

- AR_CRM_REQUEST (request message)
- AR_CRM_RESPONSE (response message)

All of the application messages that are used for integrating with 360-Degree View are synchronous.

PeopleSoft Enterprise CRM passes the request parameters for the request application message using an application class method. This table lists the application classes that PeopleSoft Enterprise CRM uses to pass the request parameters to Billing and Receivables:

PeopleSoft Application	Class ID	Class Path	Method Name
PeopleSoft Billing	EIP	RB_TD_360	PopulateBillRequestMsg
PeopleSoft Receivables	EIP	RB_TD_360	PopulatePaymentRequestMsg

See Also

PeopleSoft Enterprise CRM 8.9 Industry Application Fundamentals PeopleBook

Performance Considerations

When you integrate large amounts of data with other systems, system performance is slowed. The following tips might help.

Data Maintenance in Multiple Systems

If you have both PeopleSoft Enterprise CRM and PeopleSoft SCM databases, PeopleSoft recommends that you:

- Synchronize tables (such as Customer and Contacts) by running the FULLSYNC EIPs to perform a full batch publish to the subscribing system.

  Note. In general, FULLSYNC messages first delete all existing data in the target record and then load a copy of the source record. For Company, Consumer, Contact, and Site FULLSYNC messages that come into PeopleSoft Enterprise CRM, no delete occurs; the data is merged into the existing data instead. This ensures data integrity within the PeopleSoft Enterprise CRM system.

- Update databases in the subscribing system by running SYNC EIPs to perform incremental updates.

  SYNC messages modify, delete, or add only the data that a user affected while performing an individual transaction.

Cascading Addresses

You can set a system option that automatically updates addresses on related business objects whenever you update an address on a parent business object. When you enable this option, each update that occurs also triggers an EIP to publish the address change to PeopleSoft SCM.

See Chapter 4, “Defining Name and Address Information for Business Objects,” Maintaining Address Books for Business Objects, page 51.

See Also

Chapter 16, “Managing Enterprise Integration for PeopleSoft Enterprise CRM ,” Establishing Master ID Databases, page 292

Chapter 16, “Managing Enterprise Integration for PeopleSoft Enterprise CRM ,” Setting Up Defaults for Integrating Customer and Contact Information, page 287

Chapter 16, “Managing Enterprise Integration for PeopleSoft Enterprise CRM ,” Market-Enabling Company, Consumer, Site, and Contact EIPs, page 290

Setting Up Defaults for Integrating Customer and Contact Information

To set up defaults for integrating customer and contact information, use the Collector (COLLECTOR_TABLE), Credit Analyst (CR_ANALYST_TABLE), and General Options (RB_INSTALLATION) components.

This section discusses how to define default values for integrating customer and contact information.

Pages Used to Set Up Default Values for Integrating Customer and Contact Information

Page Name	Object Name	Navigation	Usage
Collector	COLLECTOR_TABLE	Set Up CRM, Common Definitions, Customer, Collector	Create and maintain collector codes, which are required on customer and site records in systems that are integrated with PeopleSoft Financial Management Solutions and PeopleSoft SCM.
Credit Analyst	CR_ANALYST_TABLE	Set Up CRM, Common Definitions, Customer, Credit Analyst	Create and maintain credit analyst codes, which are required on customer and site records in systems that are integrated with PeopleSoft Financial Management Solutions and PeopleSoft SCM.
Support Team Code	TEAM_CODE_TBL	Set Up CRM, Common Definitions, Codes and Auto Numbering, Support Team Codes, Support Team Code	Create and maintain support team codes, which are required on customer and site records in systems that are integrated with PeopleSoft Financial Management Solutions and PeopleSoft SCM.
Interface Defaults	RB_EIP_DEFAULTS	Set Up CRM, Common Definitions, Integration Rules, Integration Defaults, Interface Defaults	Specify default values on customer records for fields that are required for integration with PeopleSoft Financial Management Solutions and PeopleSoft SCM.
Name Type Defaults	RB_NM_TYPE_DFLT	Set Up CRM, Common Definitions, Integration Rules, Integration Defaults, Name Type Options, Name Type Defaults	Specify default name type values to use on company and contact records that are received from PeopleSoft Financial Management Solutions and PeopleSoft SCM.
General Options	RB_INSTALLATION	Set Up CRM, Install, Installation Options, General Options	Specify default exchange rate codes to use on company and contact records that are received from PeopleSoft Financial Management Solutions and PeopleSoft SCM and ensure that required codes are available to the EIP.

Creating and Maintaining Collector Codes

Access the Collector page.

Important! To ensure successful integration with PeopleSoft Financial Management Solutions and PeopleSoft SCM, you must synchronize collector codes manually between PeopleSoft Enterprise CRM and PeopleSoft Financial Management Solutions and PeopleSoft SCM. Customer (company, consumer, and site) EIP application messages that include codes that are not available in the subscribing system will fail.

Creating and Maintaining Credit Analyst Codes

Access the Credit Analyst page.

Important! To ensure successful integration with PeopleSoft Financial Management Solutions and PeopleSoft SCM, you must synchronize credit analyst codes manually between PeopleSoft Enterprise CRM and PeopleSoft Financial Management Solutions and PeopleSoft SCM. Customer (company, consumer, and site) EIP application messages that include codes that are not available in the subscribing system will fail.

Creating and Maintaining Support Team Codes

Access the Support Team Code page.

Important! To ensure successful integration with PeopleSoft Financial Management Solutions and PeopleSoft SCM, you must synchronize support team codes manually between PeopleSoft Enterprise CRM and PeopleSoft Financial Management Solutions and PeopleSoft SCM. Customer (company, consumer, and site) EIP application messages that include codes that are not available in the subscribing system will fail.

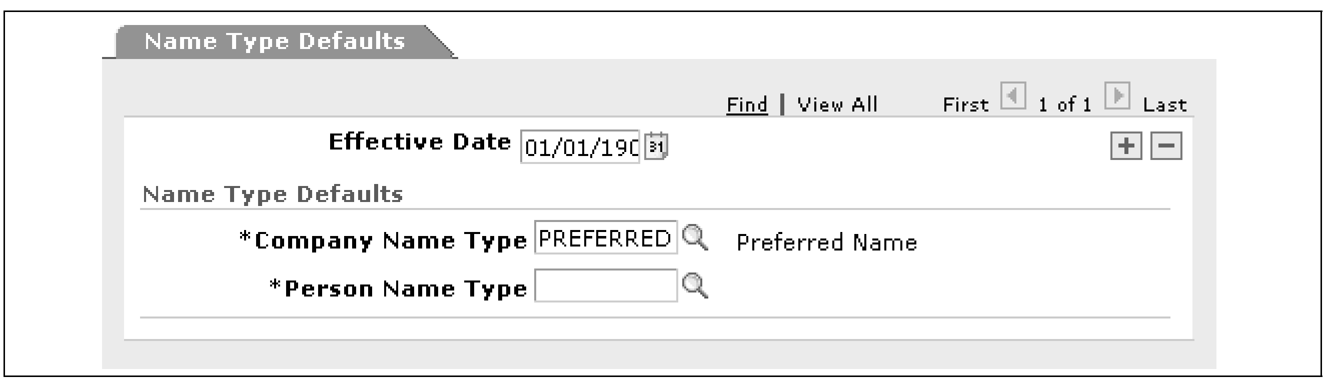
Specifying Interface Defaults

Access the Interface Defaults page.

When you create a customer or site record using the Company, Consumer, and Site components in PeopleSoft Enterprise CRM, the system automatically populates the record with the values that you enter on the Interface Defaults page. Users can select alternate values for these fields using the Bill Options view of the Customer Roles page, which is available in each of the components.

Specifying Name Type Defaults

Access the Name Type Defaults page.



Name Type Defaults page

PeopleSoft Enterprise CRM requires name type codes to create all business object records; however, PeopleSoft Financial Management Solutions and PeopleSoft SCM do not require name codes. To ensure that records that are received from PeopleSoft Financial Management Solutions and PeopleSoft SCM are populated with name types that are valid in CRM, you specify default name type values here.

See Chapter 3, "Defining Control Values for Business Objects," Defining Business Object and Name Types, page 20.

Company Name Type Enter the default value to use for name type on company records that are received from PeopleSoft Financial Management Solutions and PeopleSoft SCM. The system uses this value on customer records that are received through Customer (company, consumer, site) EIP application messages.

Person Name Type Enter the default value to use for name type on contact records that are received from PeopleSoft Financial Management Solutions and PeopleSoft SCM. The system uses this value on contact records that are received through Contact EIP application messages.

Specifying Default Exchange Rates

Access the General Options page.

Important! You must manually synchronize exchange rate codes between PeopleSoft Enterprise CRM and PeopleSoft Financial Management Solutions and PeopleSoft SCM. Customer (company, consumer, and site) EIP Application messages that include codes that are not available in the subscribing system will fail.

Ensuring Required Code Availability

Access the General Options page.

Select the Collector/Credit Analyst Req check box. This prevents Customer (company, consumer, and site) EIP application message failures in PeopleSoft Financial Management Solutions and PeopleSoft SCM that are due to missing collector or credit analyst field values.

Market-Enabling Company, Consumer, Site, and Contact EIPs

To market-enable company, consumer, site, and contact EIPs, use the Market Control Codes (RB_MKT_CTL_DFN) and Market Installation Options (RB_MKT_CTL_TBL) components.

This section discusses how to specify the markets that PeopleSoft Enterprise CRM integrates with.

Pages Used to Market-Enable Company, Consumer, Site, and Contact EIPs

Page Name	Object Name	Navigation	Usage
Market Control Codes	RB_MKT_CTL_DFN	Set Up CRM, Common Definitions, Codes and Auto Numbering, Market Control Codes	Define market control codes for market-enabling the Customer (company, consumer, and site) and Contact EIPs.
Market Installation Options	RB_MKT_CTL_TBL	Set Up CRM, Install, Market Installation Options	Specify market options for a specific market or use with the Customer (company, consumer, and site) and Contact EIPs.
Build Customer Data Management (CDM) Interface Records	RB_INT_BUILD	Set Up CRM, Common Definitions, Integration Rules, Integration Utilities, Request Processes, Build CDM Interface Records	Run the Build CDM Interface Records Application Engine process (RB_INT_BUILD).

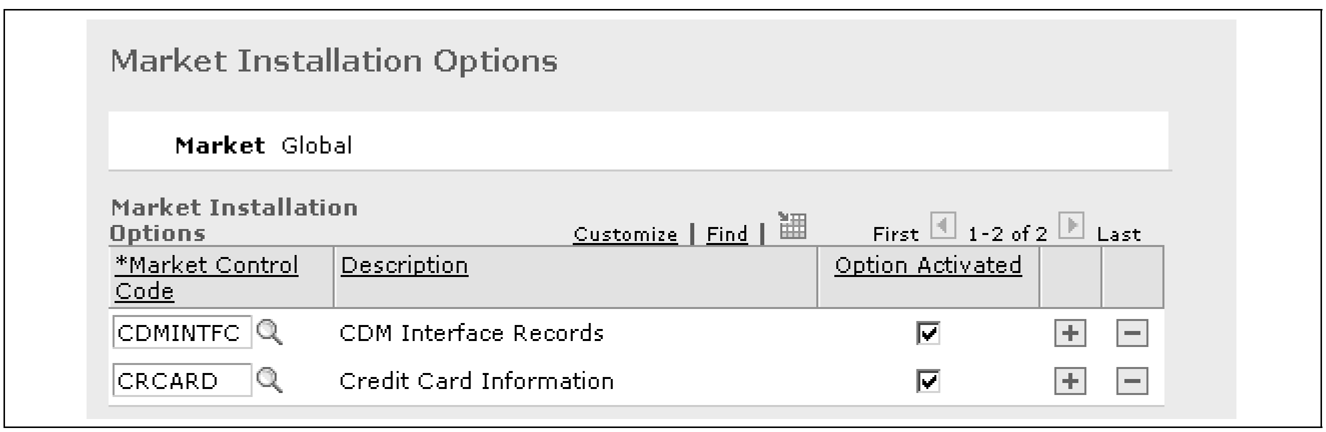
Defining Market Control Codes

Access the Market Control Codes page.

Enter a market control code name and a description. Use the Comments field to add any more information. These control codes are used on the Market Installation Options page.

Specifying Market Installation Options

Access the Market Installation Options page.



Market Installation Options page

Market Control Code Select the market control code.

Note. *CDMINTFC* is the market control code for CDM interface records.

Option Activated Select to activate the code.

Note. Use this page for market-enabling credit card information as well.

Building Business Object Relationship Model Interface Records

Access the Build CDM Interface Records page.

Click Run to run the Build CDM Interface Records process, which populates the interface records.

Establishing Master ID Databases

This section lists prerequisites and discusses how to set up master ID databases.

Prerequisites

You must first set up number type codes that relate object IDs to databases.

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

Pages Used for Establishing Master ID Databases

Page Name	Object Name	Navigation	Usage
Master ID DB Setup (master ID database setup)	RB_IDMASTER	Set Up CRM, Common Definitions, Integration Rules, Remote Data Access, Master ID Owner, Master ID DB Setup	Designate which systems have the source (or master) object IDs.
XML Test Utility	RB_XML_TEST	Set Up CRM, Common Definitions, Integration Rules, Remote Data Access, XML Test Utilities, Test XML Catcher	Test calls between remote databases.

Designating the Systems That Have Master Object IDs

Access the Master ID DB Setup page.

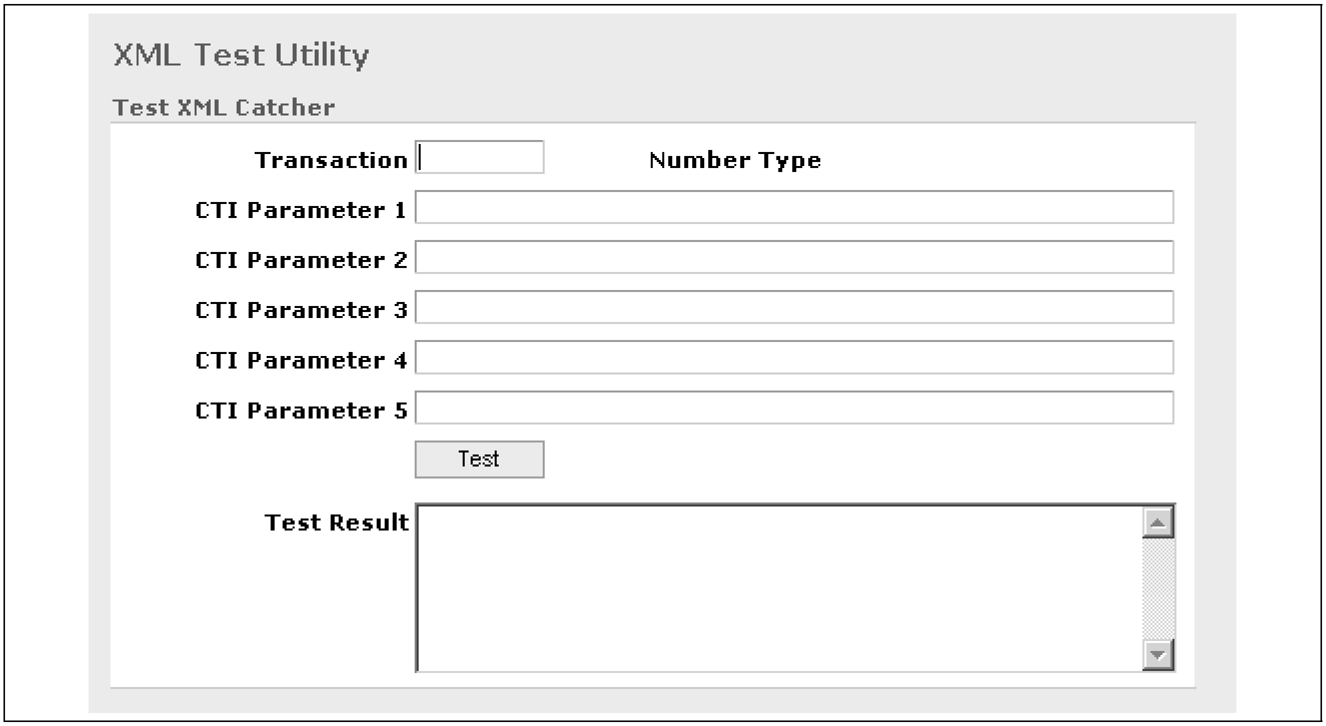
Important! Use the Master ID DB Setup page to indicate the location of the master database that is responsible for issuing identifiers for customers, contacts, and so on. You *must* do this on all databases in the community except the master. Failure to do so may result in duplicate customer and contact identifiers.

Number Type Select the objects whose IDs will be generated by the master database that appears in the Master Database URL (uniform resource locator) field. You can select the database for generating IDs for customers, contacts, products, sales orders, and quotes.

Master Database URL Enter the database URL for the master database. When an application must obtain an identifier, it checks this field to see if there is a value. If there is no value, then the system issues the identifier itself, because it is assumed that the database is the master. If there is a value, the system contacts the remote master database for the identifier.

Testing Calls

Access the XML Test Utility page.



XML Test Utility page

Transaction

Enter the identifier for the object whose ID generation you want to test. Enter *1* for customers, *2* for contacts, *3* for sales orders, *4* for quotes, and *5* for products. When you press Tab to exit the field, the system enters default values in the first three unlabeled text boxes.

The first unlabeled text box displays the setID or business unit for which the autonumber is to be generated; modify this if you like. Do not modify the other fields.

The second text box displays the next number to be generated. This is always *NEXT* by default; do not change the value.

The third field displays the zero padding indicator: *Y* (yes) to suppress leading zeros or *N* (no) to include leading zeros. You can modify this if you like.

The last two unlabeled fields are not used when testing autonumber generation.

Test

Click the Test button to fetch the next ID number from the external system. The result appears in the Text field. If the object's autonumbers come from the PeopleSoft Enterprise CRM system (and not an external ID master), the Text field displays the word *Local.*

Note. This test increments the number in the external system's database.

Mapping Message Data to PeopleSoft Enterprise CRM Records and Fields

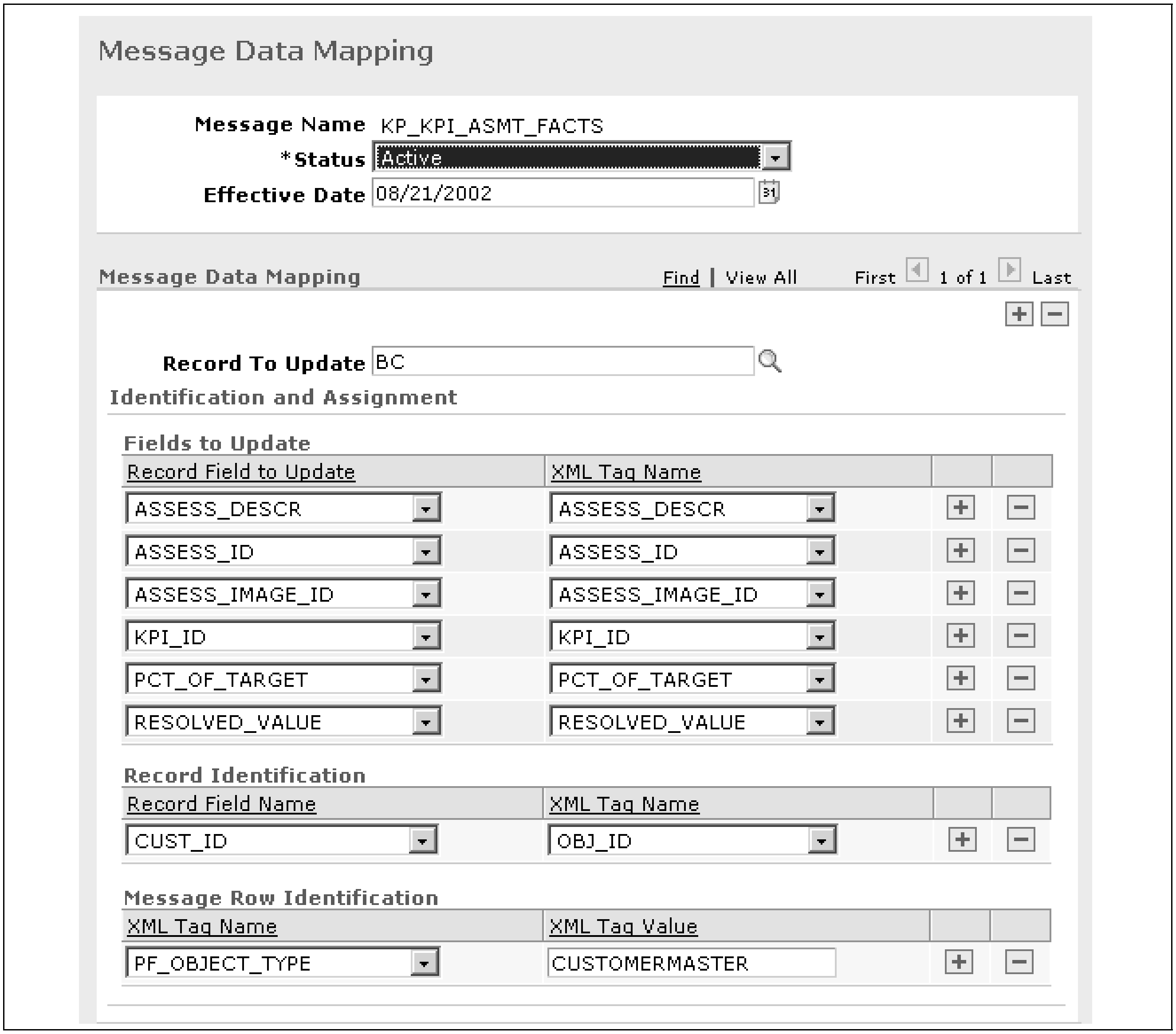
This section discusses how to map message data to PeopleSoft Enterprise CRM records and fields.

Page Used to Map Message Data to PeopleSoft Enterprise CRM Records and Fields

Page Name	Object Name	Navigation	Usage
Message Data Mapping	RB_CLAF_MAP	Set Up CRM, Common Definitions, Process Automation, Message Mapping, Message Data Mapping	Map source fields to destination fields in PeopleSoft Enterprise CRM.

Mapping Message Data to PeopleSoft Enterprise CRM Records and Fields

Access the Message Data Mapping page.



Message Data Mapping page

Note. You can define message mapping for message with single-level hierarchy only.

Message Name Displays the message against which you want to perform data mapping.

Record To Update Enter the record that needs to be updated upon receiving the message into the PeopleSoft Enterprise CRM system.

Fields to Update

Record Field to Update and **XML Tag Name** Select the fields to update along with the corresponding XML tags from the message that you plan to receive. The system updates the record fields with the value of the XML tag element from the received message.

Record Identification

Record Field Name and **XML Tag Name**

Select a record field and corresponding XML tag. This criteria identifies the rows that must be updated when PeopleSoft Enterprise CRM receives the message from another system. The system uses these fields to construct the *where* condition depending on the record fields and values of the corresponding XML tags.

Message Row Identification

XML Tag Name and **XML Tag Value**

Select the XML tags and XML tag values for the given message. This determines whether the message row qualifies with the given criteria to update the information into PeopleSoft Enterprise CRM.

In a message that you plan to receive, you may not want all of the rows to go to PeopleSoft Enterprise CRM. Using these fields, you can sparse (filter) those rows from the received message.

Message Mapping Example

Here is an example of a message:

```
<?xml version="1.0"?>
<KP_KPI_ASMT_FACTS>
  <Fieldpiece>
    <KP_KPI_PUBL_TBL class="R">
      <BUSINESS_UNIT type="CHAR"/>
      <PF_SCENARIO_ID type="CHAR"/>
      <FISCAL_YEAR type="NUMBER"/>
      <ACCOUNTING_PERIOD type="NUMBER"/>
      <KPI_ID type="CHAR"/>
      <OBJ_ID type="CHAR"/>
      <TRGT_RULE_TYPE type="CHAR"/>
      <PF_OBJECT_TYPE type="CHAR"/>
      <RESOLVED_VALUE type="NUMBER"/>
      <ASSESS_ID type="CHAR"/>
      <ASSESS_IMAGE_ID type="CHAR"/>
      <ASSESS_DESCR type="CHAR"/>
      <PERIOD_END_DT type="DATE"/>
      <PCT_OF_TARGET type="NUMBER"/>
      <STRETCH_GOAL type="NUMBER"/>
      <CURRENT_TARGET type="NUMBER"/>
      <CURRENCY_CD type="CHAR"/>
      <RESOLVED_IND type="CHAR"/>
      <KPI_CALCDTTM type="DATETIME"/>
      <KP_TREND_IND type="CHAR"/>
      <QTD_VALUE type="NUMBER"/>
      <YTD_VALUE type="NUMBER"/>
      <YEAR_OVER_YEAR_PCT type="NUMBER"/>
      <MONITOR_ONLY type="CHAR"/>
      <DESCR type="CHAR"/>
      <KP_USER_FLD1 type="CHAR"/>
```

```
        <KP_USER_FLD2 type="CHAR"/>
        <PS_OWNER type="CHAR"/>
      </KP_KPI_PUBL_TBL>
      <PSCAMA class="R">
        <LANGUAGE_CD type="CHAR"/>
        <AUDIT_ACTN type="CHAR"/>
        <BASE_LANGUAGE_CD type="CHAR"/>
        <MSG_SEQ_FLG type="CHAR"/>
        <PROCESS_INSTANCE type="NUMBER"/>
        <PUBLISH_RULE_ID type="CHAR"/>
        <MSGNODENAME type="CHAR"/>
      </PSCAMA>
    </FieldTypes>
    <MsgData>
      <Transaction>
        <KP_KPI_PUBL_TBL class="R">
          <BUSINESS_UNIT>FSI01</BUSINESS_UNIT>
          <PF_SCENARIO_ID>1</PF_SCENARIO_ID>
          <FISCAL_YEAR>1998</FISCAL_YEAR>
          <ACCOUNTING_PERIOD>1</ACCOUNTING_PERIOD>
          <KPI_ID>1</KPI_ID>
          <OBJ_ID>200022</OBJ_ID>
          <TRGT_RULE_TYPE/>
          <PF_OBJECT_TYPE>CUSTMASTER</PF_OBJECT_TYPE>
          <RESOLVED_VALUE>11</RESOLVED_VALUE>
          <ASSESS_ID>11</ASSESS_ID>
          <ASSESS_IMAGE_ID>PS_COMPANY_ICN</ASSESS_IMAGE_ID>
          <ASSESS_DESCR>Green</ASSESS_DESCR>
          <PERIOD_END_DT/>
          <PCT_OF_TARGET>11</PCT_OF_TARGET>
          <STRETCH_GOAL>0</STRETCH_GOAL>
          <CURRENT_TARGET>0</CURRENT_TARGET>
          <CURRENCY_CD>USD</CURRENCY_CD>
          <RESOLVED_IND/>
          <KPI_CALCDTTM/>
          <KP_TREND_IND/>
          <QTD_VALUE>4670</QTD_VALUE>
          <YTD_VALUE>4670</YTD_VALUE>
          <YEAR_OVER_YEAR_PCT>0</YEAR_OVER_YEAR_PCT>
          <MONITOR_ONLY/>
          <DESCR/>
          <KP_USER_FLD1>KPI</KP_USER_FLD1>
          <KP_USER_FLD2/>
          <PS_OWNER/>
        </KP_KPI_PUBL_TBL>
        <PSCAMA class="R">
          <LANGUAGE_CD>ENG</LANGUAGE_CD>
          <AUDIT_ACTN/>
          <BASE_LANGUAGE_CD>ENG</BASE_LANGUAGE_CD>
          <MSG_SEQ_FLG/>
```

```
            <PROCESS_INSTANCE>0</PROCESS_INSTANCE>
            <PUBLISH_RULE_ID/>
            <MSGNODENAME/>
          </PSCAMA>
        </Transaction>
      </MsgData>
    </KP_KPI_ASMT_FACTS>
```


From this message and the mapping that is provided, you can determine the:

- Message name - KP_KPI_ASMT_FACTS
- Record to update

  This message updates the BC table.
- Fields to update

  The BC table fields ASSESS_DESCR, ASSESS_ID, ASSESS_IMAGE_ID, KPI_ID, and PCT_OF_TARGET are updated with the values of XML tags <ASSESS_DESCR>, <ASSESS_ID>, <ASSESS_IMAGE_ID>, <KPI_ID>, and <PCT_OF_TARGET> in the message.
- Record identification

  Subscription code updates the row in the BC table if the CUST_ID field value equals the value of the XML tag <OBJ_ID> in the message.
- Message row identification

  Message rows qualify if the value of the XML tag <PF_OBJECT_TYPE> is equal to *CUSTOMERMASTER*; otherwise, the message rows are ignored.

CHAPTER 17

Importing Data Into PeopleSoft Enterprise CRM

This chapter provides an overview of the Data Import Application Engine process (RBIMPORT) and discusses how to:

- Set up data import global settings.
- Define data import templates.
- Run the Data Import process.
- View the Data Import process status.

Understanding the Data Import Application Engine Process (RBIMPORT)

This section lists prerequisites and provides an overview of the Data Import process.

Prerequisites

Before you can import data into PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM), you must ensure that:

- The Extract Transformation Load (Data Transformer) is set up correctly in the environment.

  See *PeopleSoft Data Transformer for CRM 8.9 PeopleBook*
- The PeopleSoft super user ID has CREATE TABLE privileges for dynamic table creates.
- The FTP server is defined so it can store import file attachments.

  To do this, modify the RB_IMP_ATTACH URL identifier by using the URLs - URL Maintenance page in PeopleTools.

  See *Enterprise PeopleTools 8.45 PeopleBook: Server Tools*
- You define Data Import global settings.

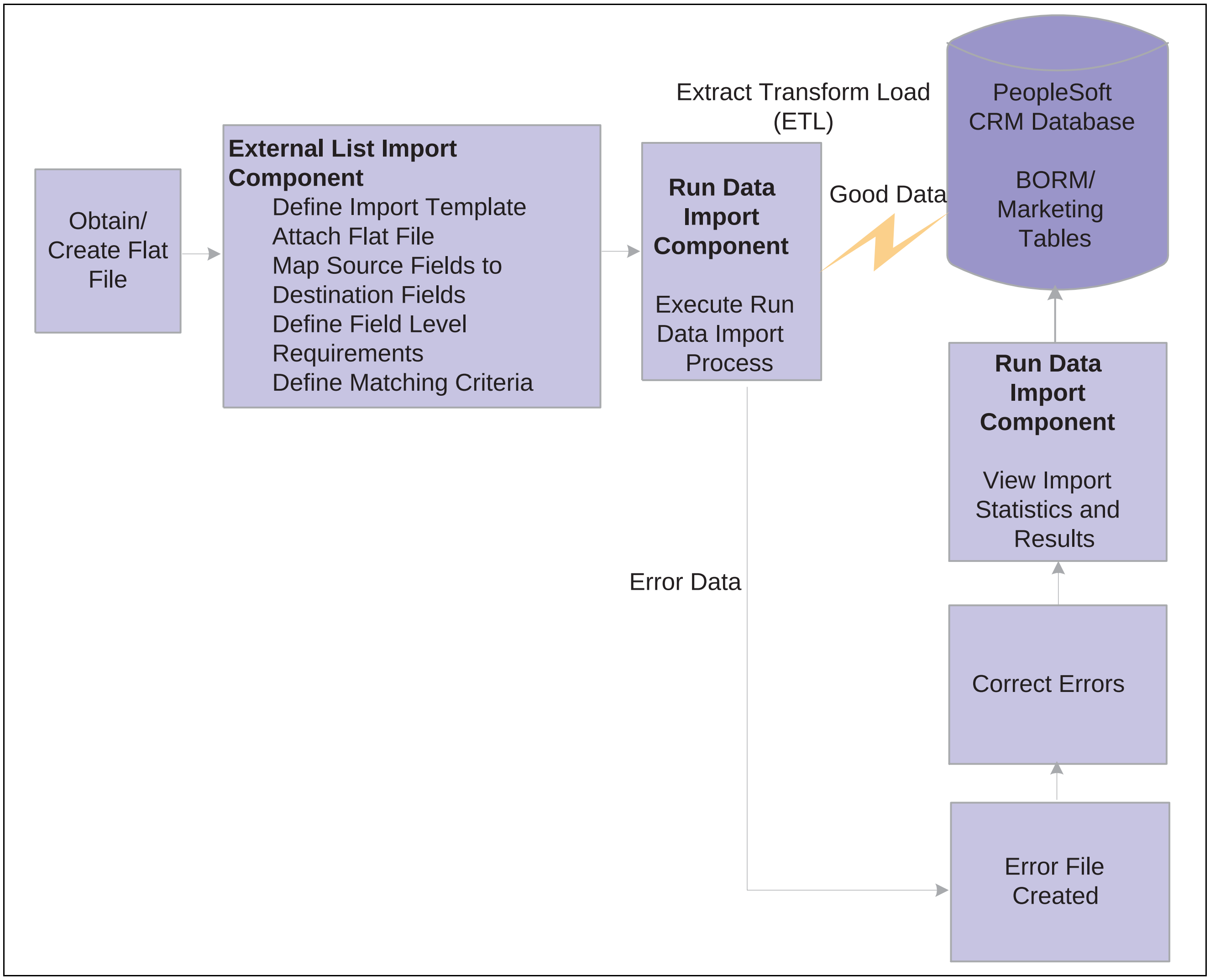
Data Import Process

The Data Import process enables you to:

- Batch-load external data from other systems (in flat file format) into the PeopleSoft Enterprise CRM database.

  This is mainly used to load companies, contacts and consumers. You also can generate marketing lists from the data you load.

- Update existing individual and organization records to supplement profile data for better targeting and personalization of marketing efforts.



Data Import process flowchart

To import data into PeopleSoft Enterprise CRM:

1. Create a flat file with one of the accepted delimiters (tab, comma, or semicolon) for the import.
2. Define an import template by using the Define Import Template component.
    a. Define import template information (name, role to associate with imported data, and audience to associate with template, if applicable).
    b. Define field mapping requirements.
    c. Define matching criteria.
3. (Optional) Run the Data Import process by using the Run Data import page.

   To validate the template against the data file contents, select the File Validation Only check box to perform validation tests of the data.

   The file validation step checks the file contents and structure and writes errors to an error file, which you can use to correct problems prior to running the Data Import process.

Examples of validations that are performed are: length of fields in the import file compared to field lengths that are in the database, compatibility of data types, and number of delimiters in each row.

4. View the status of the Data Import process by using the View Import Status page.

   You can view import dates, times, and statuses, such as: *inprocess*, *queued*, and *successful*.

5. View the results of the Data Import process by using the View Import Statistics page.

   You can view the number of inserted, matched, updated, and in-error import rows.

6. Correct any data errors that don't successfully load in the process and perform the Data Import process again.

Setting Up Data Import Global Settings

To set up data import global settings, use the Data Import Global Settings (RB_IMP_GLB_SETUP) component.

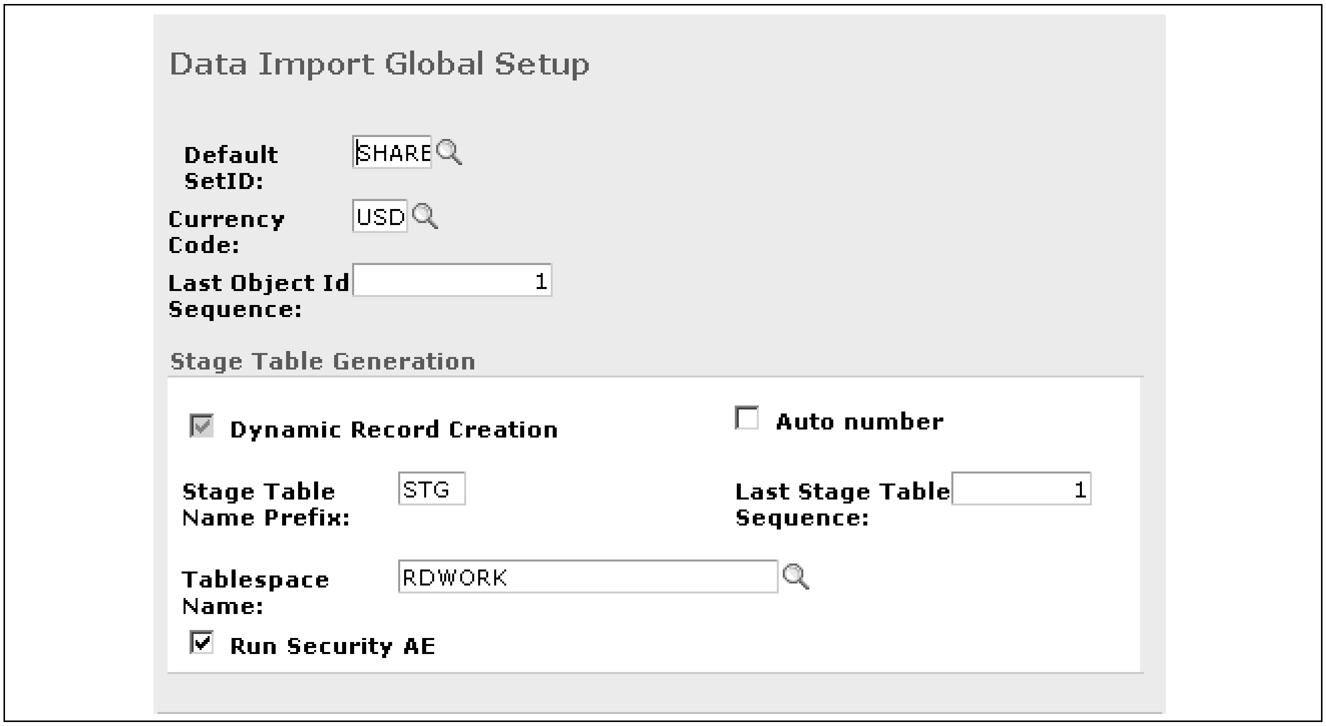
This section discusses how to define data import global settings.

Page Used to Set Up Data Import Global Settings

Page Name	Object Name	Navigation	Usage
Data Import Global Setup	RB_IMP_GLB_PG	Customers CRM, Data Import, Data Import Global Settings, Data Import Global Setup	Define global settings that are for the Data Import process.

Defining Data Import Global Settings

Access the Data Import Global Setup page.



Data Import Global Setup page

Default SetID

Enter the default setID. The Data Import process enters the default setID on any target table that requires a set ID while it processes import data. Examples of tables which require setIDs are: RD_PERSON and RD_COMPANY.

Currency Code

Enter the default currency code, which the Data Import process uses for target tables that require a currency code.

Last Object Id Sequence

Enter a starting integer. Use this field when you create object IDs that are not system-generated. The format of generated IDs is *sequence number*:*counter*. For example, if my starting sequence number is 1, and you import a file with 100 companies, the format of the generated IDs is 1:1 through 1:100. The subsequent load of 50 company objects generates IDs 2:1 through 2:50.

Stage Table Generation

Dynamic Record Creation

Indicates that tables are dynamically created during the Data Import process, which executes many CREATE TABLE statements during processing. This is necessary to stage the imported data and to perform matching logic. You cannot edit this field.

Note. The PeopleSoft super user ID must have Create Table privileges for the process to complete successfully.

Auto number

Select to enable automatic number generation for imported data.

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

Stage Table Name Prefix

Enter the prefix for the staging tables. The staging tables are defined as *prefix_numeric value* (for example, STG_215). The system assigns numeric values in sequential order.

Last Stage Table Sequence

Enter a new sequence number, or leave the default, which is the last stage table sequence that the system creates. The system automatically assigns table sequences during the Data Import process. If you enter a new number, the system uses that number as its starting point in the process.

SQL Space Name

Enter the tablespace name under which you want the system to create the staging tables.

PeopleSoft Enterprise CRM provides the predefined table space name (RDWORK).

Note. When performing the Data Import process on an Oracle or DB2 platform, you must define a SQL space name.

Defining Data Import Templates

To define data import templates, use the Data Import (RB_IMP_DATA_CONFSR_GBL) component.

This section discusses how to:

- Access data import templates.
- Define data import templates.
- Define import files.
- Map source fields to target fields.
- Define matching criteria.
- Verify template creation.

Pages Used to Define Data Import Templates

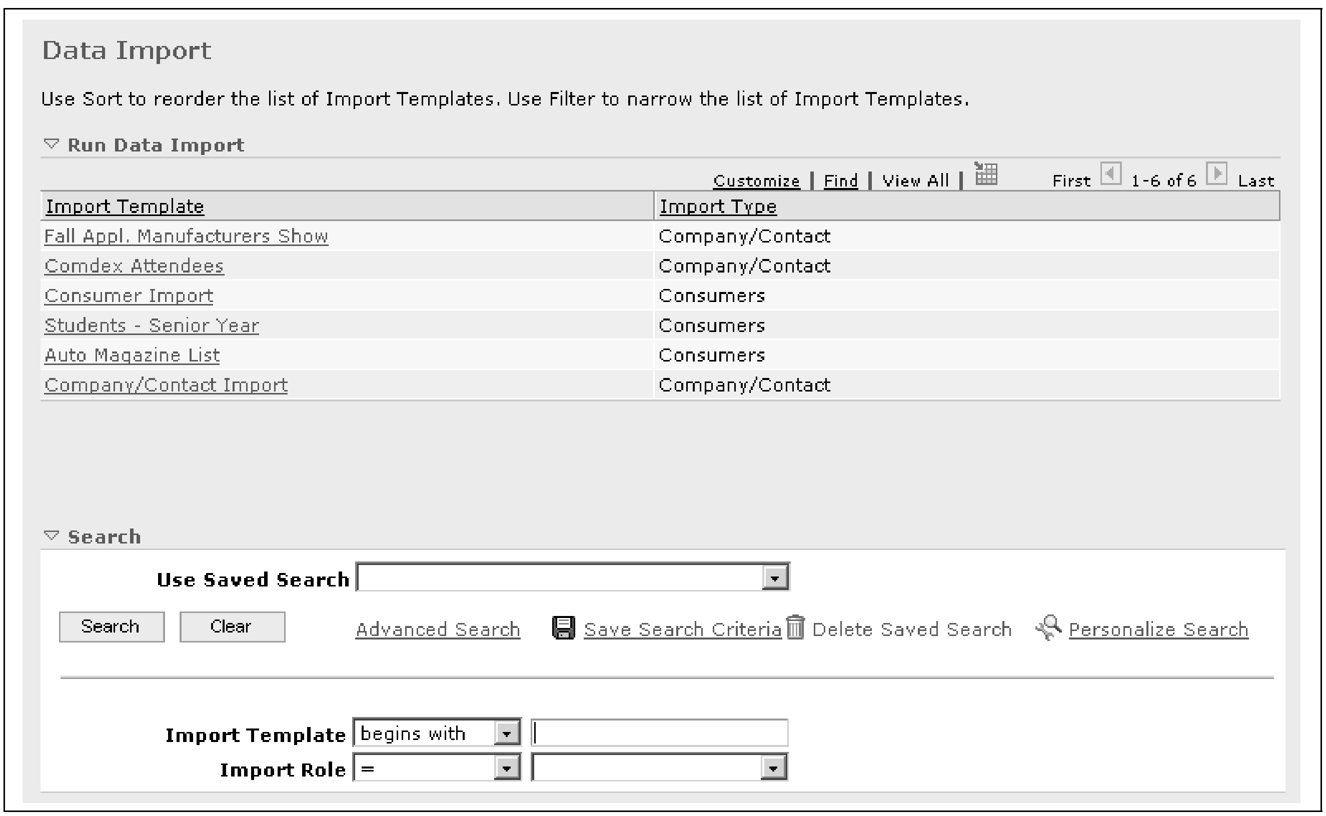
Page Name	Object Name	Navigation	Usage
Data Import	RB_IMP_DATA_CONFSR	Customers CRM, Data Import, Data Import Templates, Data Import	Access a data import template to modify or add a new template.

Page Name	Object Name	Navigation	Usage
Data Import - Step 1: Define Import Template	RB_IMP_HEADER	• Click the Create a New Import Template button on the Data Import Template Search page. • Select an existing template on the Data Import Template Search page. • Click the Go Back to Import Definition button on the Save Confirmation page. • Customers CRM, Data Import, Run Data Import, Run Data Import Search Click the View Import Definition link on the Run Data Import page.	Define general information and the role with which the imported data is associated. The role determines the target field tree that appears at mapping time.
Audiences - Audience Details	RA_LIST_MAIN	 Click the Transfer to Audience button on the Data Import - Step 1: Define Import Template page.	Describe the audience of the data that is imported. For use in PeopleSoft Marketing, you must specify an audience of type *Internal using Import*. See *PeopleSoft Enterprise CRM 8.9 Marketing Applications PeopleBook*, "Using Audiences," Creating and Managing Audiences.
Data Import - Step 2: Define Import File	RB_IMP_FILESPEC	Click the Next button on the Data Import - Step 1: Define Import Template page.	Associate the flat file of data and load the header fields from the flat file to the import template. Optionally, assign user-friendly labels to the header fields.
Data Import - Step 3: Mapping	RB_IMPORT_MAP	Click the Next button on the Data Import - Step 2: Define Import File page.	Map the source fields that are contained in the flat file to the target fields in the PeopleSoft Enterprise CRM database and define the field requirements.
Data Import - Select Target Field	RB_SEL_MAP_IN_FLD	Click the Select Target link next to a Field Label on the Data Import - Step 3: Mapping page.	View the target fields in a tree format to assist with target field selection in the mapping process.

Page Name	Object Name	Navigation	Usage
Specify Concatenation	RB_MAP_CONCAT	Select a Mapping Action of Concatenate in the Advanced region of the Data Import - Step 3: Mapping page and click the Specify Concatenation link.	Define the field concatenation criteria.
Data Import - Step 4: Matching	RB_IMP_MATCH_ADV	Click the Next button on the Data Import - Step 3: Mapping page.	Define the matching rules for the import data. For example, define which existing field or set of fields in the PeopleSoft Enterprise CRM database you want to specify as constituting a match for an individual or organization record.
Save Confirmation	RB_IMP_CONF_PG	Click the Save Import Template button on the Data Import - Step 4: Matching page.	Verify import template creation.

Accessing Data Import Templates

Access the Data Import page.



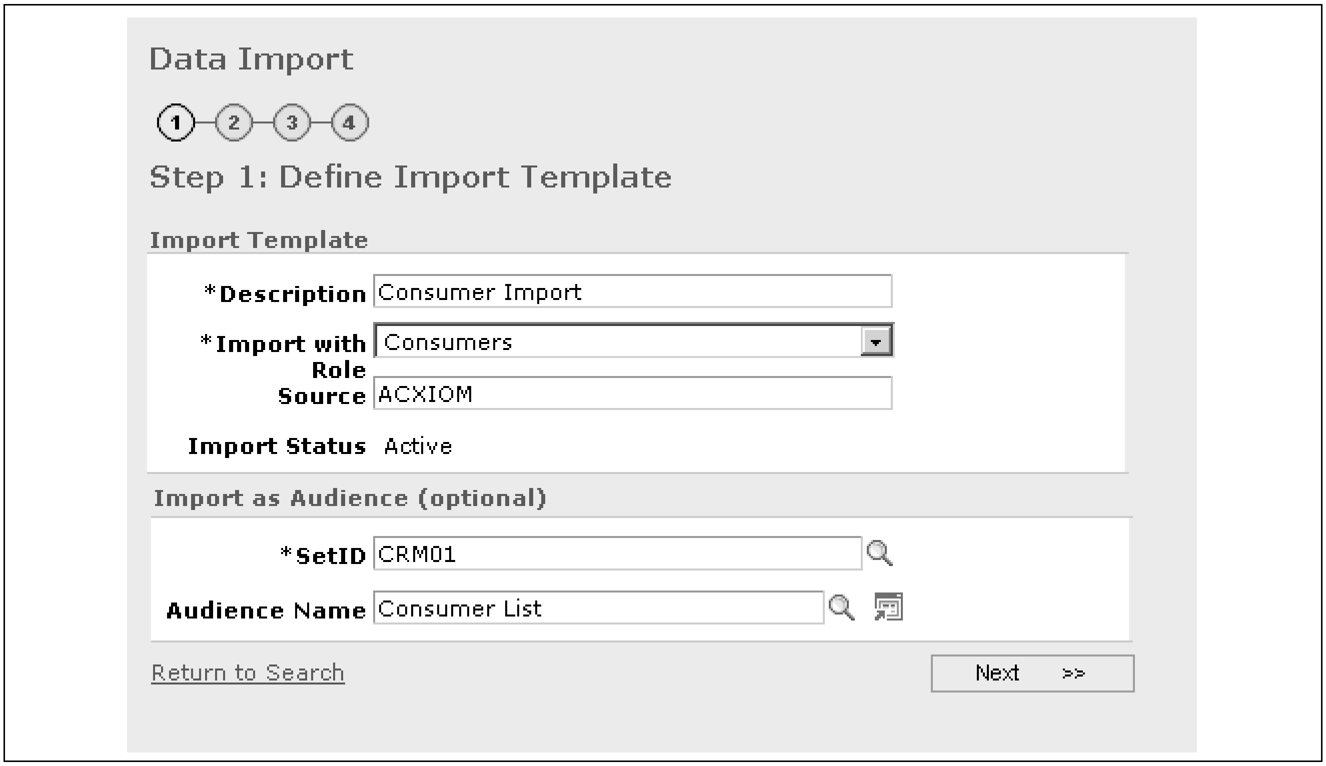
Data Import page

The appearance, behavior, and personalization options for this page are controlled by the search definition for the Data Import Template component.

Create a New Import Template Click to access the Data Import - Step 1: Define Import Template page and create a new import template.

Defining Data Import Templates

Access the Data Import - Step 1: Define Import Template page.



Data Import - Step 1: Define Import Template page

Import with Role Select the role to associate with the import template. All records that are in the file are imported into the BORM with the selected role. Values are:

Company: Select for company or partner company records.

Company/Contact: Select for individual records for persons who function as contacts for companies or any type of organization.

Consumers: Select for persons who do not function as contacts for companies.

Note. The role that you select here determines the objects that you can map to. For example, if you select *Consumer,* the only fields that are available to map to are those that are defined for the Consumer role.

Source (Optional) Enter the source of the information that is contained in the flat file. This field is associated with the template itself as opposed to individual records that are within the file. To associate a source with each record, create a text profile field that is called Source and use the Data Import - Step 3: Mapping page to map a constant value into that field.

Import Status Displays the import status that the system assigns when you begin to create an import template. Initially, the status is *In Process.* It stays as such until you complete the steps to define an import template, at which time it changes to *Active*.

SetID and **Audience**

Enter an existing setID and audience of type *Internal using Import* to bring the import data into the PeopleSoft Enterprise CRM database as a discrete audience. Or, to create a new audience, click the Transfer to Audience button to access the Audiences - Audience Details page and identify the name, audience ID, and owner.

Note. If you import the records as an Internal by using Import audience, you can use the audience immediately after import. However, you can't further segment the audience in the Audience Builder. If you want to do further segmentation rather than create an audience at the time of import, create a text profile field called Audience Source, and use the Mapping step to map a constant value in that field for all records. After import, create an internal audience by using the Audience Builder with the first condition being that all records that are equal to the constant value that is mapped into the profile field called Audience Source.

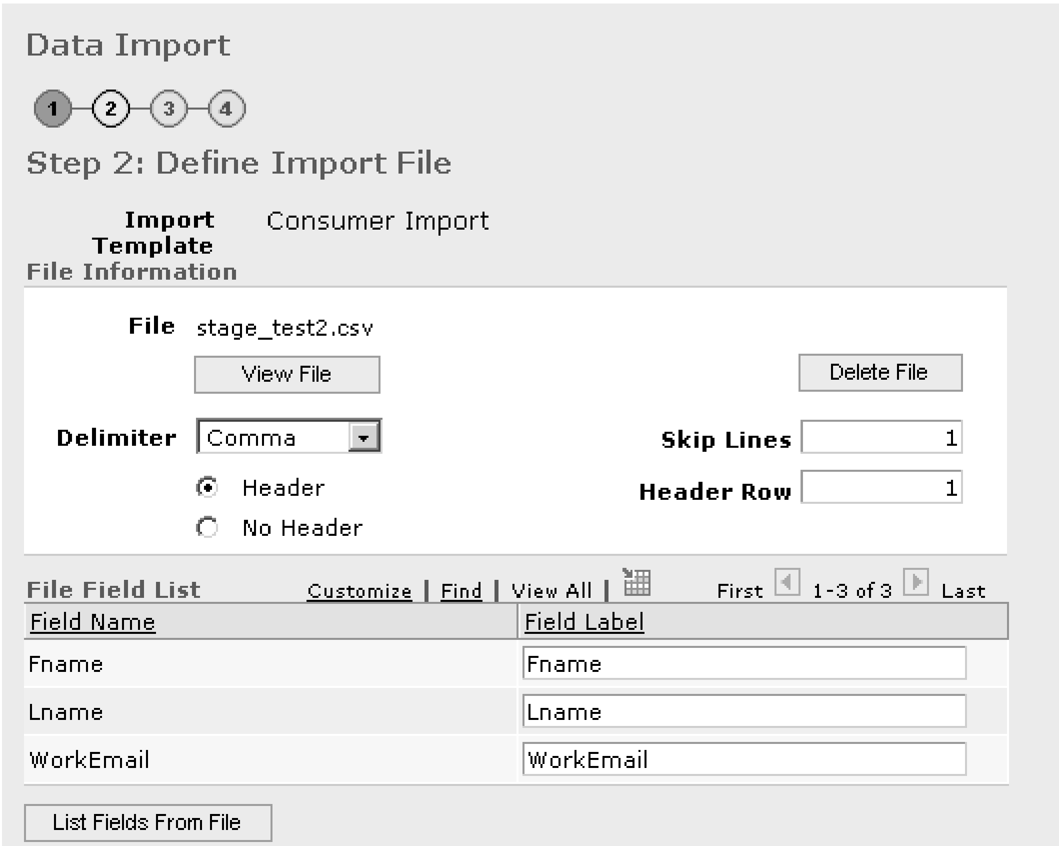
See *PeopleSoft Enterprise CRM 8.9 Marketing Applications PeopleBook*, "Using Audiences," Creating and Managing Audiences.

Next

Click to access the Data Import - Step 2: Define Import File page and proceed to the next page in the import definition process.

Defining Import Files

Access the Data Import - Step 2: Define Import File page.



Data Import - Step 2: Define Import File page

On initial access to access this page when you are defining a new template, the Attach File button is available; the rest of the fields are empty. The Delete File and View File buttons are not available until you attach a file.

To define an import file:

1. Attach the flat file to the import template.

    a. Click the Attach File button; a dialog box appears.

    b. Click the Browse button on the dialog box and select the desired flat file.

    c. Click the Upload button.

    The system attaches the flat file to the import template definition, and the Data Import - Step 2: Define Import File page appears.

2. (Optional) Click the View File button to view the rows of information that are contained in the flat file.

3. Define flat file information.

    - Select the flat file delimiter *(Comma, Semicolon,* or *Tab).*

    - Define header row information.

      If the flat file contains a header row, select the Headeroption and also enter the header row location in the Header Row field. If you do not enter a header row number, the system assumes that it is *1*.

      If the flat file doesn't contain a header row, select the No Header option.

- Identify blank rows in the flat file.

  If you have blank rows at the top of the flat file, enter the number of blank rows that you want the system to skip in the Skip Lines field.

4. Attach the flat file fields to the import template.

   Click the List Fields From File button. The system attaches the flat file fields to the import template.

   If the flat file contains a header row, the system populates the Field Name column with the exact names of the fields (for example, lname and fname) that are contained in the header row of the flat file's header row. The system also populates the Field Label fields with the same information as shown in the field name fields.

   If the flat file doesn't contain a header row, the system populates these columns with *FIELD1, FIELD2,* and so on until all of the flat file fields are represented.

5. (Optional) Change the field labels to represent more meaningful and understandable names to the flat file fields.

   For example, the field name lname may need a field label of Last Name to assist others who may review the template for reuse.

6. Click the Next button to access the Data Import - Step 3: Mapping page and proceed to the next step in the import template definition process.

Deleting Import Files

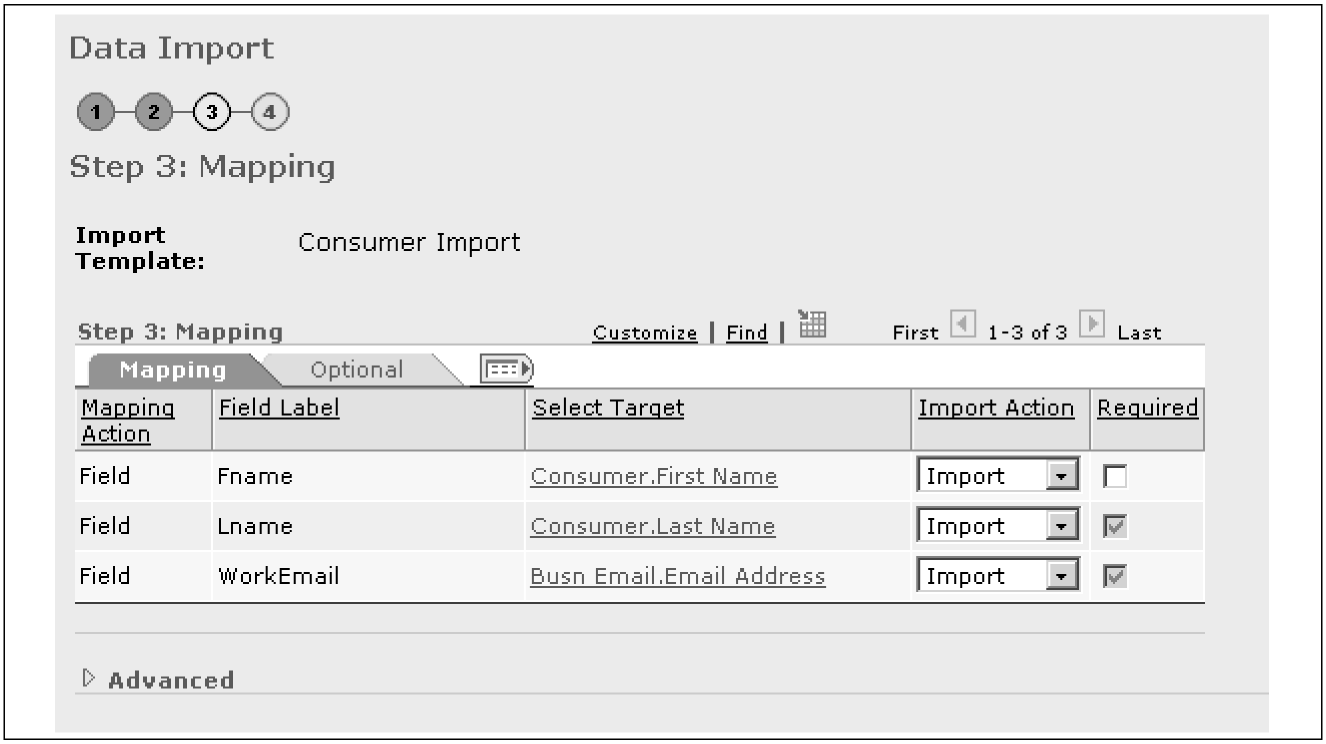
To delete an import file:

1. Display an existing import template definition that already has an import file attached on the Data Import - Step 2: Define Import File page.
2. Click the Delete File button.

   When you click this button, the system deletes the flat file from the import template definition as well as all field and mapping definitions that are from the import template. At that time, you can select another flat file.

Mapping Source Fields to Target Fields

Access the Data Import - Step 3: Mapping page.



Data Import - Step 3: Mapping page

When you access this page, the source field labels appear in the Step 3: Mapping scroll area, and the Advanced scroll area is collapsed.

You must map at least one source field that is contained in the flat file to a target field in the PeopleSoft Enterprise CRM database. The fields that you must map depend on the target fields that you select. A message appears if you do not map all required fields (required fields have an asterisk at the end of the field name in the folder tree view).

If you can perform one-to-one mapping of the source fields to the target fields, you only need to use the Mapping scroll area.

If you must use a default constant in a target field, concatenate source fields into one target field, or enter a source field into multiple target fields, you must use both the Mapping and Advanced scroll areas.

Mapping Source Fields to Target Fields

To map the source flat file fields to target fields:

1. Select the target field for each source field.

    a. Click the Select Target link next to a source field label to access the Select Target Field page, which displays the target fields that are in the PeopleSoft Enterprise CRM database in a tree format. The tree format depends on the role that you select when you define the import template. An asterisk appears next to the fields that PeopleSoft Enterprise CRM requires. At each folder level, there are required fields. For example, at the highest folder, Individual-Consumer, the required field is Last Name. Down one level, in the Phone folder, Contact Method Purpose ID and Telephone both have an asterisk; while Telephone is not required for an import. If the folder is mapped, then you must map any required fields in that folder or in the folders above it. In this example, you must map both Contact Method Purpose ID from the Phone folder and Last Name from the higher-level Individual-Consumer folder.

b. Find and select the target field by expanding the folders and viewing the fields on the Select Target Field page.

   When you click the field in the tree, the Data Import - Step 3: Mapping page appears with the field description in the Select Target field for this particular field.

2. Select the import action for each field:

   Ignore Select to ignore this field and not import it when you perform the import process. This is useful for when you reuse import templates and want to import only a subset of the premapped fields.

   Import Select to import this field when you perform the import process.

3. Define required fields for the flat file import process.

   Select the Required Flag check box if this field must have a value in the flat file before the data is imported into PeopleSoft Enterprise CRM.

   For example, if Name is defined as a required field on the flat file and you attempt to import a flat file that does not contain name information, those rows of data on the flat file are not imported into PeopleSoft Enterprise CRM; they are written to the error file.

4. (Optional) Select the Optional tab in the Step 3: Mapping page region to define fields to group together.

   Enter the same number for every field that in the group in the Sequence field. For example, suppose that you have a flat file that contains this information on one row, as indicated in the Source Field column:

Source Field	Sequence	Target Field
First Name	1	Consumer.First Name
Last Name	1	Consumer.Last Name
Email Address	1	Email.Email Address
First Name	2	Consumer.First Name
Last Name	2	Consumer.Last Name
Email Address	2	Email.Email Address

   In this case, the same type of information is repeated on one row. For the system to understand what fields should go together when they are inserted into the database, you must assign a sequence number. In this example, the first three fields are grouped together and are inserted into the database as a group, and the last three fields are grouped together and are inserted into the database as a group. You must always map a consistent number of objects with a file in this format. For example, if you map two instances of First Name, you must also map two instances of Last Name and two instances of Email Address.

   If you create a flat file that has multiple rows with the information instead of one row, you don’t need to use the Sequence field. By virtue of the information being on separate rows, the system knows what fields to group together.

5. Click Next to access the Data Import - Step 4: Matching page and proceed to the next step in the import process.

Note. You perform the functions in the remainder of this section in the Advanced region of the page.

Mapping Concatenated Source Fields to Target Fields

To map concatenated source fields to a target field:

1. Expand the Advanced region and select a mapping action of *Concatenate.*

   The system displays the Specify Concatenation column with a Specify Concatenation link.

2. Select the target field.

   - Click the Select Target link next to the row in the Select Target column to access the Select Target Field page and view the target fields that are in the PeopleSoft Enterprise CRM database in a folder tree view.

     The folders and fields that appear are dependant on the role that you select when you define the import template. An asterisk appears next to the fields that PeopleSoft Enterprise CRM requires. At each folder level, there are required fields; if a field in a folder is mapped, then you must also map any required fields in that folder or in the folders above it.

   - Open the folders to find the target field that you want, and click the field to access the Data Import - Step 3: Mapping page, which displays the field description in the Select Target field for this particular row.

3. Enter the fields or values that you want concatenated.

   - Click the Specify Concatenation link next to the row to access the Specify Concatenation page.
   - Enter the target fields for concatenation, and select a concatenation type.

     If you select a concatenation type of *Value,* enter a value in the Value field.

     If you select a concatenation type of *Field,* select the field that you want to concatenate in the Field Label column.

   - Click OK to access the Data Import - Step 3: Mapping page, which displays the concatenation criteria in the Specify Concatenation column for this row.

Mapping Constants to Target Fields

To map a constant value to a target field:

1. Select a mapping action of *Constant* next to a row in the Advanced scroll area.

   This makes the Value field available.

2. Select the target field.

   - Click the Select Target link next to the row that is in the Select Target column to access the Select Target Field page, which displays the target fields in the PeopleSoft Enterprise CRM database in a folder tree view.

     The folders and fields are dependent on the role that you select when you define the import template. In addition, an asterisk appears next to the fields that PeopleSoft Enterprise CRM requires. At each folder level, there are required fields; if a field in a folder is mapped, then you must also map any required fields that are in that folder or in the folders that are above it.

   - Find the target field in the tree on the Select Target Field page, and click the node of the tree for that field to access the Data Import - Step 3: Mapping page, which displays the field description that you enter in the Select Target field for this particular row.

3. Enter the value that you want to appear by default in the target field in the Value field.

To enter data, time, or date values, please consult the Enterprise PeopleTools PeopleBooks to determine the correct formats.

Mapping Already-Mapped Source Fields to Other Target Fields

To map an already mapped source field to another target field:

1. Expand the Advanced scroll area and select a mapping action of *Field* next to a row.

   This activates the Field Label field.

2. Select the target field.

   - Click the Select Target link that is next to the row that is in the Select Target column to access the Select Target Field page appears, which displays the target fields that are in the PeopleSoft Enterprise CRM database in a folder tree view.

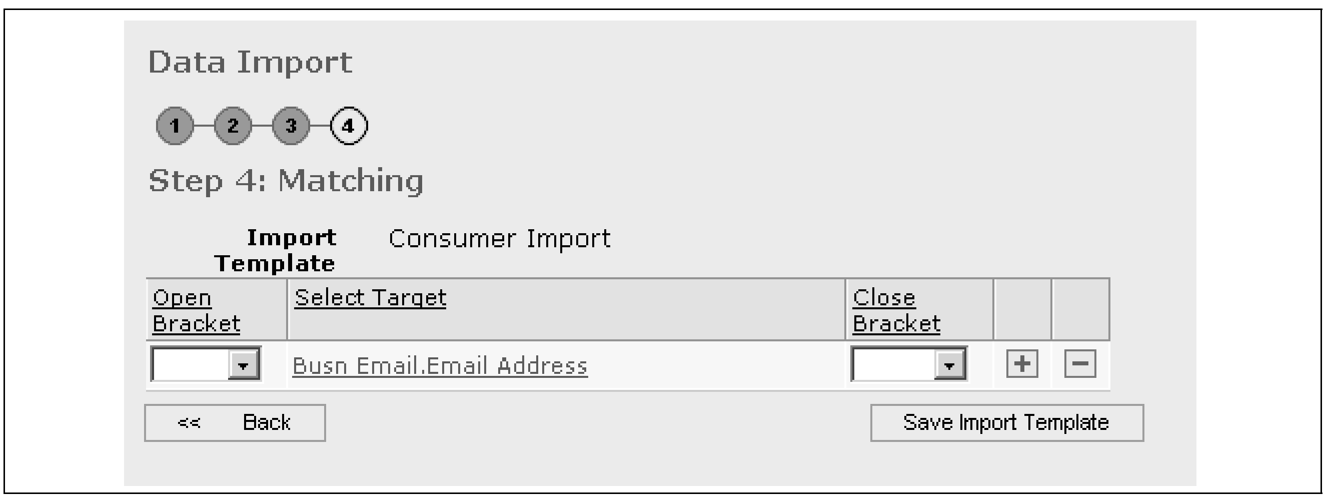
     The folders and fields are dependant on the role that you select when you define the import template. An asterisk appears next to the fields that PeopleSoft Enterprise CRM requires. At each folder level, there are required fields; if a field in a folder is mapped, then you must also map any required fields that are in that folder or in the folders that are above it.

   - Find the target field that is in the tree on the Select Target Field page and click the field to access the Data Import - Step 3: Mapping page, which displays the field description that is entered in the Select Target field for this particular row.

3. Select the already-mapped field label in the Field Label field.

Defining Matching Criteria

Access the Data Import - Step 4: Matching page.



Data Import - Step 4: Matching page

This page enables you to specify the fields in the PeopleSoft that must match fields in the import file before the database is updated from the import file. If the system doesn't find a match, it inserts the incoming row as a new record in the PeopleSoft Enterprise CRM database. If it finds a match, the system updates the existing record with the new information from the file, unless you clear the Update Matched Records check box at import time. In that case only, the system writes matched records to the error file instead of being updated.

Note. New data never overwrites or updates an existing record's contact method fields (phone, email, and address); the new fields are appended as additional contact methods. All other types of mapped fields are updated or overwritten by the new data for matched records.

Warning! All fields, including email address, are case sensitive for matching. To avoid instances where a match is not found due to case sensitivity, you should convert fields such as email address to lowercase prior to import. For example, convert Joe_Smith@ABC.com to joe_smith@abc.com before importing the file.

Select Target Click to display a hierarchy of fields that are in the PeopleSoft Enterprise CRM database into which you are importing data.

Save Import Template Click to save the data import template and access the Save Confirmation page.

Enter the matching criteria that you want to associate with the import template. Use the Open Bracket and Close Bracket options appropriately for the nested condition on which to match. For example, it's always a good idea to match on a combination of email address and last name or of any contact method and name information (for example, email address and lastname or phone and lastname). For the Company/Contact import type, it's good to match on at least one field from the Company mapping, and at least one field from the Contact mapping or Contact Method mapping.

Verifying Template Creation

Access the Save Confirmation page.

This page displays:

- A message that indicates if the template is saved successfully.

  The Import status is set to *Active*.
- The Run Data Import link.

  Click this link to access the Run Data Import page and immediately run the import process.
- The Go Back to Import Definition link.

  Click this link to access the Data Import - Step 1: Define Import Template page and view the existing template and make any necessary changes.

Running the Data Import Application Engine Process (RBIMPORT)

This section discusses how to:

- Access the Raw Data Import page.
- Run the Data Import Process.

Pages Used to Run the Data Import Application Engine Process (RBIMPORT)

Page Name	Object Name	Navigation	Usage
Data Import	RB_IMP_RUN_CONFSRC	Customers CRM, Data Import, Run Data Import, Data Import	Search for and view existing templates to use for the Data Import process.
Data Import	RB_IMP_RUN_DATA_PG	• Click the Save Import Template button on the Data Import - Step 4: Matching page. Click the Run Import link on the Save Confirmation page. • Select an existing template on the Run Data Import Search page and click the Import Data button.	Run the Data Import process.

Accessing the Run Data Import Page

Access the Data Import search page.

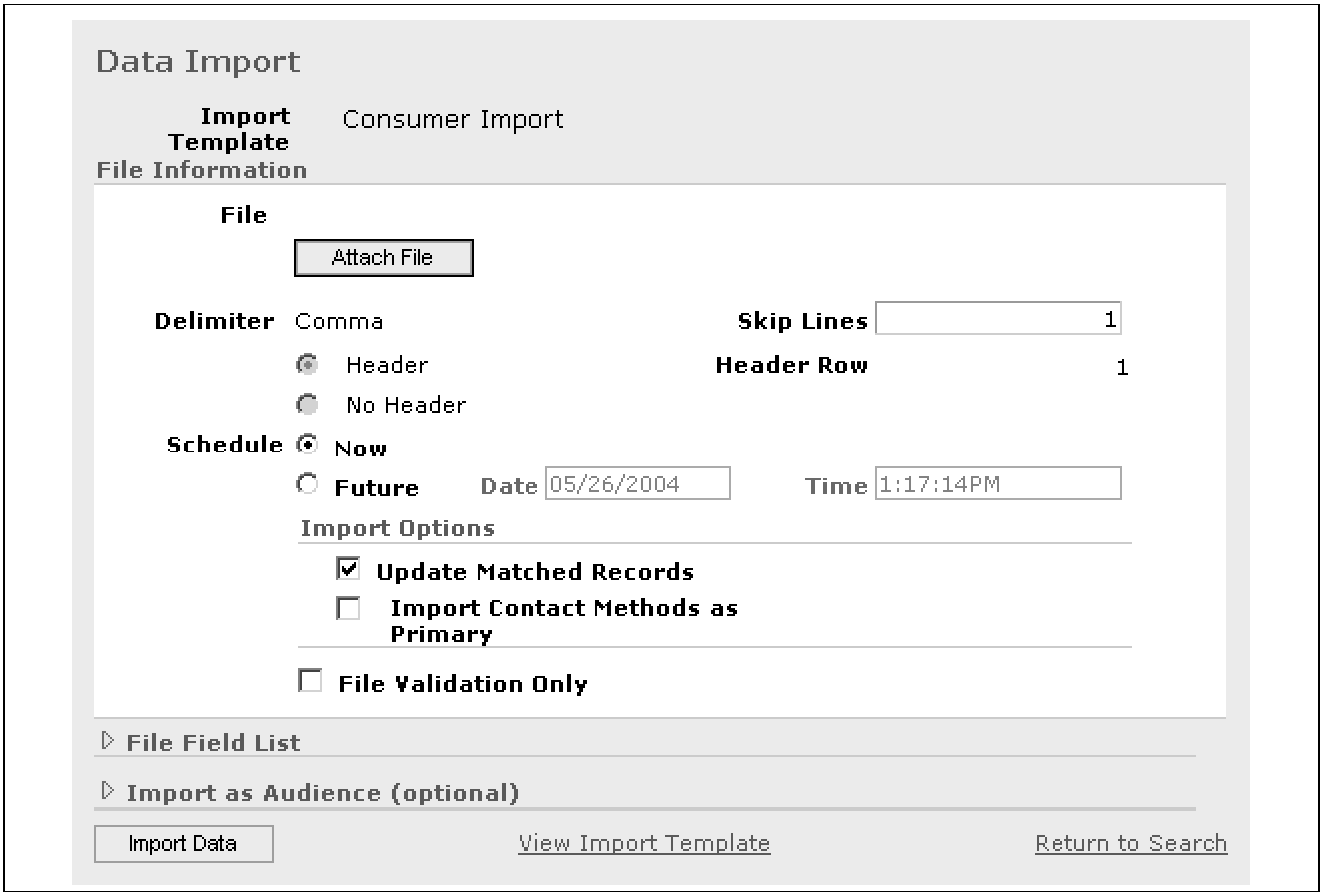
The search definition for the Run Data Import component controls the appearance, behavior, and personalization options for this page.

See Also

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

Running the Data Import Application Engine Process (RBIMPORT)

Access the Data Import page.



Data Import page

If you access this page from the menu, you must attach a flat file and define its parameters. When you access this page as the last step when defining an import template, the system populates the flat file information for you.

Note. Attaching a flat file on this page works as on the Data Import - Step 2: Define Import File page .

File Information

Date, Time, and **Now**

Enter a date and time when the Data Import process is to run, or select Now. If you enter a past date, the system runs the process immediately.

File Validation Only

Select to perform data validation tests of the Data Import process before you actually perform the process. This is a preventative step that is useful for new files from unknown vendors.

If you select this option, the Data Import process runs to validate data types that are within the file but doesn't run the actual insert of the data into the PeopleSoft Enterprise CRM database. For example, the process validates for proper field types; if a character string is mapped into a number field, or if a mapped date is not in the correct format, an error occurs. The process checks for whether mapped fields are longer than the target field. The end result is an error file that contains all of the input rows with detailed error messages so that the end user can make corrections.

Update Matched Records

Select this check box to specify that when there is a match between a source record and an existing target record in the PeopleSoft Enterprise

CRM database, the existing target record is updated with the fields that are mapped from the source record data. The rules that you set up on the Data Import - Step 4: Matching page determine the match.

If you do not select this check box, you must view the error file to see a list of the records that match but are not updated.

See Chapter 17, “Importing Data Into PeopleSoft Enterprise CRM,” Viewing the Status of One Data Import Process Instance, page 319.

Note. Contact method fields are never updated with imported data; instead, the new information is added to the database.

Import Contact Methods as Primary

Select to enforce that an imported contact method is checked as *Primary.* This overwrites existing primary flags in the PeopleSoft Enterprise CRM database. If you do not select this check box (which is cleared by default), the system still imports all mapped contact methods, but none are flagged as *Primary.*

Every PeopleSoft Enterprise CRM business object supports multiple contact methods of each type. For example, a contact or consumer that is named John Doe can have multiple business email addresses, multiple home phone numbers, and so on. However, John Doe can have only one primary home phone number.

File Field List

The File Field List screen region displays the fields that are associated with the import template. This enables you to verify whether the import works in the case where you access the Data Import process directly from the menu and use an existing template.

Import As Audience

SetID and **Audience Name**

Enter an existing setID and audience of type *Internal using Import* in the Import as Audience (optional) group box to bring the import data into the PeopleSoft Enterprise CRM database as a discrete audience. Or, create a new audience by clicking the Transfer to Audience button to access the Internal using Import Audience definition page and identify the name, audience ID, and owner.

Import Status

The Import Status group box appears only after you click the Import Data button.

View Import Statistics

Click to access the View Import Statistics page.

Other Page Links and Buttons

View Import Definition

Click to access the Data Import - Step 1: Define Import Template page and view the import template definition.

See Chapter 17, “Importing Data Into PeopleSoft Enterprise CRM,” Defining Data Import Templates, page 303.

Import Data

Click to run the Data Import process and open the Import Status group box, which displays the status of the Run Data Import process and contains a View Import Statistics link.

If the Data Import process finds no matches between the flat file data and data in the PeopleSoft Enterprise CRM database, it creates the business objects, contacts, consumers, or organizations as specified.

If the Data Import process finds a match with the flat file data and data in the PeopleSoft Enterprise CRM database, it updates the business objects as specified.

Viewing the Data Import Process Status

This section discusses how to view the status of the Data Import process.

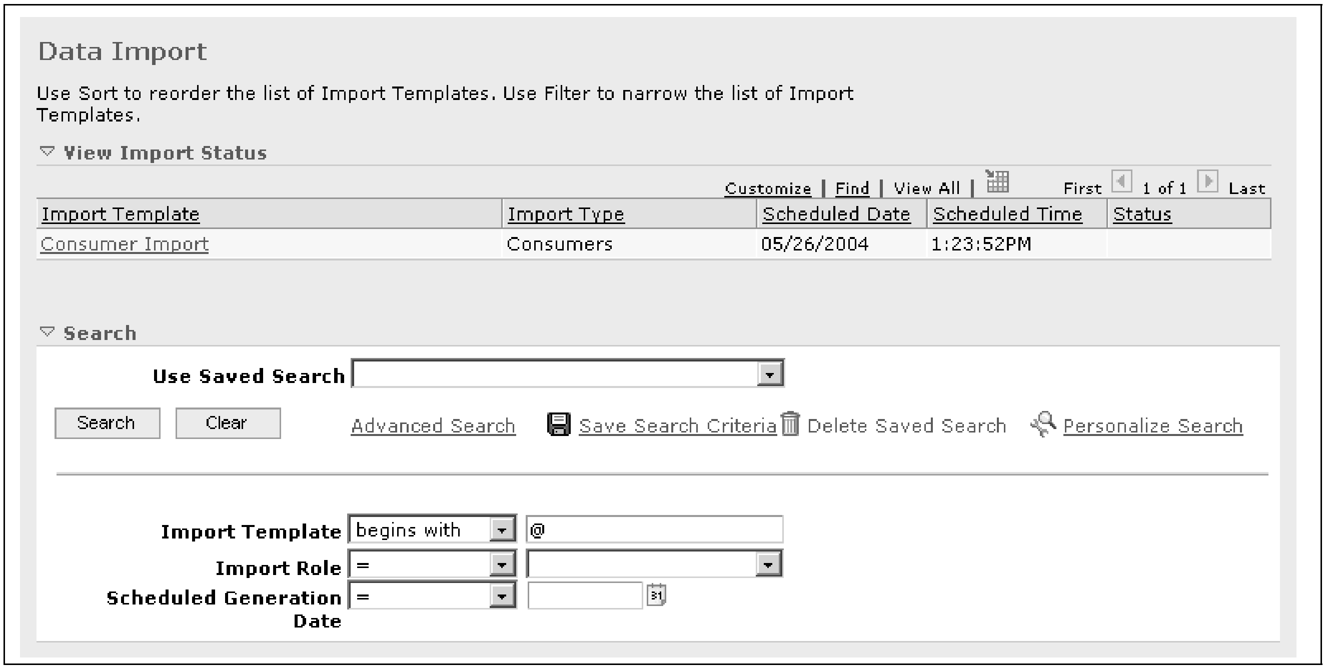
- View instances of the run date import process.
- View the status of one data import process instance.
- View import statistics.
- View the data import process file error.

Pages Used to View the Data Import Process Status

Page Name	Object Name	Navigation	Usage
Data Import	RB_IMP_VIEW_CONFSR	Customers CRM, Data Import, View Import Status	View instances, or runs, of the Run Data Import process.
Data Import	RB_IMP_VIEW_STATUS	Select an instance of the Run Data Import process on the View Import Status Search page.	View the status of one instance of the Data Import process.
View Import Statistics	RB_IMP_VW_STATS	Click the View Import Statistics link on the Run Data Import page or the View Import Status page.	View import statistics.

Viewing Instances of the Run Data Import Process

Access the Data Import page.



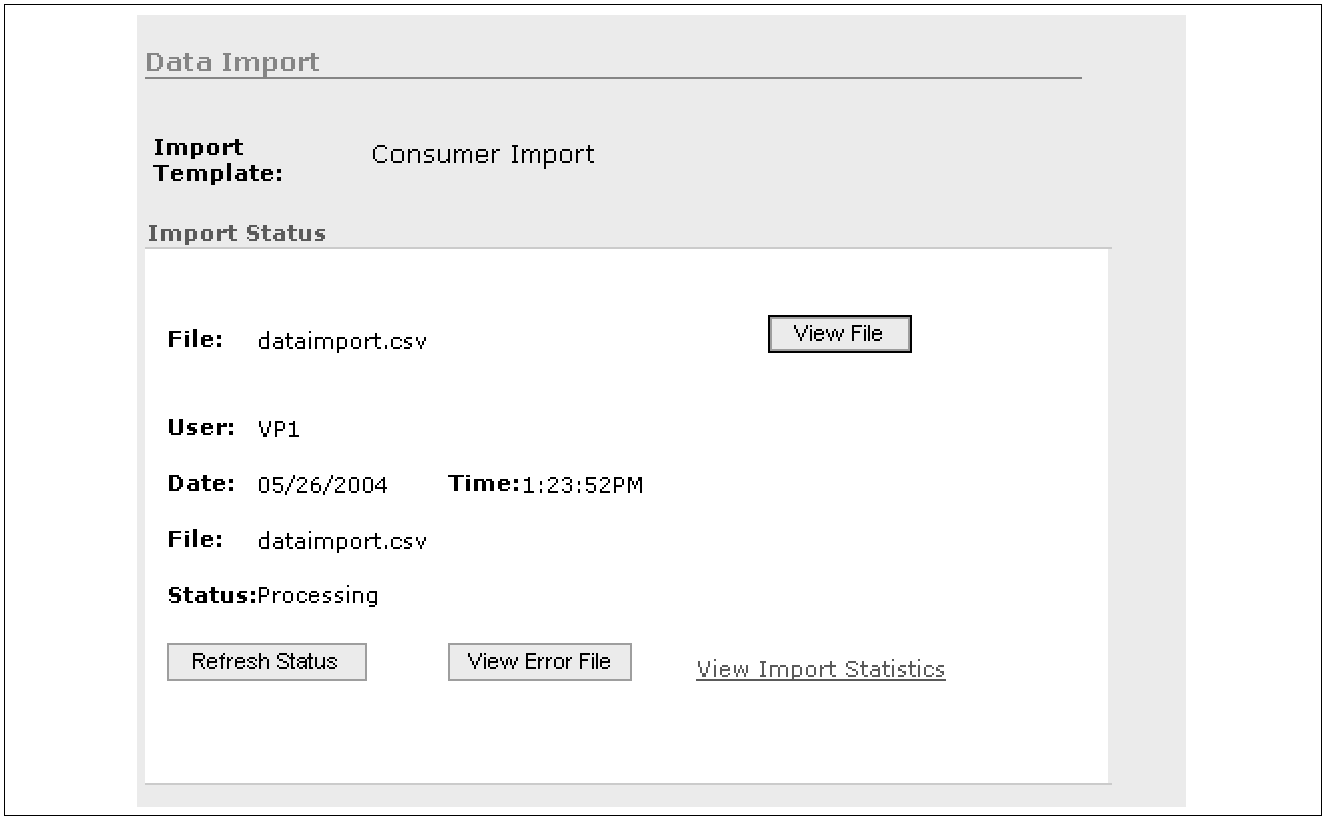
Data Import

The search definition for the View Import Status component controls the appearance, behavior, and personalization options for this page.

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

Viewing the Status of One Data Import Process Instance

Access the Data Import page.



Data Import page

View File Click to view the flat file that is used for the Data Import process.

View Error File Click to download and view the error log file that the Data Import process creates. The error log contains details about the rows that are in error so that you can fix them and rerun the process. If you do not select Update Matched Records on the Data Import page, the error log also contains a listing of the records that match but are not updated.

View Import Statistics Click to access the View Import Statistics page and view the import statistics, number of rows inserted, updated, and matched, and the total number of records that are processed.

Viewing Import Statistics

Access the View Import Statistics page.

This page displays the import statistics from the Data Import process.

View Process Monitor Click to access the Process Monitor - Process List page and monitor the Data Import process in detail.

See *PeopleSoft Process Scheduler*

View Error File Click to download and view the error file that the Data Import process creates. The error file contains details about the rows that are in error so that you can fix them and rerun the process, if desired.

Viewing the Data Import Process Error File

Access the error file.

The error file looks just like the input flat file except that after every row there are messages about what is wrong with the input row. Correct the problems with data on this error file and then rerun the Data Import process by using this file.

APPENDIX A

ISO Country and Currency Codes

PeopleBooks use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

This appendix discusses:

- ISO country codes.
- ISO currency codes.

See Also

"About This PeopleBook." Typographical Conventions and Visual Cues

ISO Country Codes

This table lists the ISO country codes that may appear as country identifiers in PeopleBooks:

ISO Country Code	Country Name
ABW	Aruba
AFG	Afghanistan
AGO	Angola
AIA	Anguilla
ALB	Albania
AND	Andorra
ANT	Netherlands Antilles
ARE	United Arab Emirates
ARG	Argentina
ARM	Armenia
ASM	American Samoa
ATA	Antarctica

ISO Country Code	Country Name
ATF	French Southern Territories
ATG	Antigua and Barbuda
AUS	Australia
AUT	Austria
AZE	Azerbaijan
BDI	Burundi
BEL	Belgium
BEN	Benin
BFA	Burkina Faso
BGD	Bangladesh
BGR	Bulgaria
BHR	Bahrain
BHS	Bahamas
BIH	Bosnia and Herzegovina
BLR	Belarus
BLZ	Belize
BMU	Bermuda
BOL	Bolivia
BRA	Brazil
BRB	Barbados
BRN	Brunei Darussalam
BTN	Bhutan
BVT	Bouvet Island
BWA	Botswana
CAF	Central African Republic
CAN	Canada
CCK	Cocos (Keeling) Islands

ISO Country Code	Country Name
CHE	Switzerland
CHL	Chile
CHN	China
CIV	Cote D'Ivoire
CMR	Cameroon
COD	Congo, The Democratic Republic
COG	Congo
COK	Cook Islands
COL	Colombia
COM	Comoros
CPV	Cape Verde
CRI	Costa Rica
CUB	Cuba
CXR	Christmas Island
CYM	Cayman Islands
CYP	Cyprus
CZE	Czech Republic
DEU	Germany
DJI	Djibouti
DMA	Dominica
DNK	Denmark
DOM	Dominican Republic
DZA	Algeria
ECU	Ecuador
EGY	Egypt
ERI	Eritrea
ESH	Western Sahara

ISO Country Code	Country Name
ESP	Spain
EST	Estonia
ETH	Ethiopia
FIN	Finland
FJI	Fiji
FLK	Falkland Islands (Malvinas)
FRA	France
FRO	Faroe Islands
FSM	Micronesia, Federated States
GAB	Gabon
GBR	United Kingdom
GEO	Georgia
GHA	Ghana
GIB	Gibraltar
GIN	Guinea
GLP	Guadeloupe
GMB	Gambia
GNB	Guinea-Bissau
GNQ	Equatorial Guinea
GRC	Greece
GRD	Grenada
GRL	Greenland
GTM	Guatemala
GUF	French Guiana
GUM	Guam
GUY	Guyana
GXA	GXA - GP Core Country

ISO Country Code	Country Name
GXB	GXB - GP Core Country
GXC	GXC - GP Core Country
GXD	GXD - GP Core Country
HKG	Hong Kong
HMD	Heard and McDonald Islands
HND	Honduras
HRV	Croatia
HTI	Haiti
HUN	Hungary
IDN	Indonesia
IND	India
IOT	British Indian Ocean Territory
IRL	Ireland
IRN	Iran (Islamic Republic Of)
IRQ	Iraq
ISL	Iceland
ISR	Israel
ITA	Italy
JAM	Jamaica
JOR	Jordan
JPN	Japan
KAZ	Kazakstan
KEN	Kenya
KGZ	Kyrgyzstan
KHM	Cambodia
KIR	Kiribati
KNA	Saint Kitts and Nevis

ISO Country Code	Country Name
KOR	Korea, Republic of
KWT	Kuwait
LAO	Lao People’s Democratic Rep
LBN	Lebanon
LBR	Liberia
LBY	Libyan Arab Jamahiriya
LCA	Saint Lucia
LIE	Liechtenstein
LKA	Sri Lanka
LSO	Lesotho
LTU	Lithuania
LUX	Luxembourg
LVA	Latvia
MAC	Macao
MAR	Morocco
MCO	Monaco
MDA	Moldova, Republic of
MDG	Madagascar
MDV	Maldives
MEX	Mexico
MHL	Marshall Islands
MKD	Fmr Yugoslav Rep of Macedonia
MLI	Mali
MLT	Malta
MMR	Myanmar
MNG	Mongolia
MNP	Northern Mariana Islands

ISO Country Code	Country Name
MOZ	Mozambique
MRT	Mauritania
MSR	Montserrat
MTQ	Martinique
MUS	Mauritius
MWI	Malawi
MYS	Malaysia
MYT	Mayotte
NAM	Namibia
NCL	New Caledonia
NER	Niger
NFK	Norfolk Island
NGA	Nigeria
NIC	Nicaragua
NIU	Niue
NLD	Netherlands
NOR	Norway
NPL	Nepal
NRU	Nauru
NZL	New Zealand
OMN	Oman
PAK	Pakistan
PAN	Panama
PCN	Pitcairn
PER	Peru
PHL	Philippines
PLW	Palau

ISO Country Code	Country Name
PNG	Papua New Guinea
POL	Poland
PRI	Puerto Rico
PRK	Korea, Democratic People's Rep
PRT	Portugal
PRY	Paraguay
PSE	Palestinian Territory, Occupie
PYF	French Polynesia
QAT	Qatar
REU	Reunion
ROU	Romania
RUS	Russian Federation
RWA	Rwanda
SAU	Saudi Arabia
SDN	Sudan
SEN	Senegal
SGP	Singapore
SGS	Sth Georgia & Sth Sandwich Is
SHN	Saint Helena
SJM	Svalbard and Jan Mayen
SLB	Solomon Islands
SLE	Sierra Leone
SLV	El Salvador
SMR	San Marino
SOM	Somalia
SPM	Saint Pierre and Miquelon
STP	Sao Tome and Principe

ISO Country Code	Country Name
SUR	Suriname
SVK	Slovakia
SVN	Slovenia
SWE	Sweden
SWZ	Swaziland
SYC	Seychelles
SYR	Syrian Arab Republic
TCA	Turks and Caicos Islands
TCD	Chad
TGO	Togo
THA	Thailand
TJK	Tajikistan
TKL	Tokelau
TKM	Turkmenistan
TLS	East Timor
TON	Tonga
TTO	Trinidad and Tobago
TUN	Tunisia
TUR	Turkey
TUV	Tuvalu
TWN	Taiwan, Province of China
TZA	Tanzania, United Republic of
UGA	Uganda
UKR	Ukraine
UMI	US Minor Outlying Islands
URY	Uruguay
USA	United States

ISO Country Code	Country Name
UZB	Uzbekistan
VAT	Holy See (Vatican City State)
VCT	St Vincent and the Grenadines
VEN	Venezuela
VGB	Virgin Islands (British)
VIR	Virgin Islands (U.S.)
VNM	Viet Nam
VUT	Vanuatu
WLF	Wallis and Futuna Islands
WSM	Samoa
YEM	Yemen
YUG	Yugoslavia
ZAF	South Africa
ZMB	Zambia
ZWE	Zimbabwe

ISO Currency Codes

This table lists the ISO country codes that may appear as currency identifiers in PeopleBooks:

ISO Currency Code	Description
ADP	Andorran Peseta
AED	United Arab Emirates Dirham
AFA	Afghani
AFN	Afghani
ALK	Old Lek
ALL	Lek
AMD	Armenian Dram

ISO Currency Code	Description
ANG	Netherlands Antilles Guilder
AOA	Kwanza
AOK	Kwanza
AON	New Kwanza
AOR	Kwanza Reajustado
ARA	Austral
ARP	Peso Argentino
ARS	Argentine Peso
ARY	Peso
ATS	Schilling
AUD	Australian Dollar
AWG	Aruban Guilder
AZM	Azerbaijanian Manat
BAD	Dinar
BAM	Convertible Marks
BBD	Barbados Dollar
BDT	Taka
BEC	Convertible Franc
BEF	Belgian Franc
BEL	Financial Belgian Franc
BGJ	Lev A/52
BGK	Lev A/62
BGL	Lev
BGN	Bulgarian LEV
BHD	Bahraini Dinar
BIF	Burundi Franc
BMD	Bermudian Dollar

ISO Currency Code	Description
BND	Brunei Dollar
BOB	Boliviano
BOP	Peso
BOV	Mvdol
BRB	Cruzeiro
BRC	Cruzado
BRE	Cruzeiro
BRL	Brazilian Real
BRN	New Cruzado
BRR	Brazilian Real Dollar
BSD	Bahamian Dollar
BTN	Ngultrum
BUK	N/A
BWP	Pula
BYB	Belarussian Ruble
BYR	Belarussian Ruble
BZD	Belize Dollar
CAD	Canadian Dollar
CDF	Franc Congolais
CHF	Swiss Franc
CLF	Unidades de fomento
CLP	Chilean Peso
CNX	Peoples Bank Dollar
CNY	Yuan Renminbi
COP	Colombian Peso
CRC	Costa Rican Colon
CSD	Serbia Dinar

ISO Currency Code	Description
CSJ	Krona A/53
CSK	Koruna
CUP	Cuban Peso
CVE	Cape Verde Escudo
CYP	Cyprus Pound
CZK	Czech Koruna
DEM	Deutsche Mark
DJF	Djibouti Franc
DKK	Danish Krone
DOP	Dominican Peso
DZD	Algerian Dinar
ECS	Sucre
ECV	Unidad de Valor
EEK	Kroon
EGP	Egyptian Pound
EQE	Ekwele
ERN	Nakfa
ESA	Spanish Peseta
ESB	Convertible Peseta
ESP	Spanish Peseta
ETB	Ethiopian Birr
EUR	euro
FIM	Markka
FJD	Fiji Dollar
FKP	Falklands Isl. Pound
FRF	French Franc
GBP	Pound Sterling

ISO Currency Code	Description
GEK	Georgian Coupon
GEL	Lari
GHC	Cedi
GIP	Gibraltar Pound
GMD	Dalasi
GNE	Syli
GNF	Guinea Franc
GNS	Syli
GQE	Ekwele
GRD	Drachma
GTQ	Quetzal
GWE	Guinea Escudo
GWP	Guinea-Bissau Peso
GYD	Guyana Dollar
HKD	Hong Kong Dollar
HNL	Lempira
HRD	Dinar
HRK	Kuna
HTG	Gourde
HUF	Forint
IDR	Rupiah
IEP	Irish Pound
ILP	Pound
ILR	Old Shekel
ILS	New Israeli Sheqel
INR	Indian Rupee
IQD	Iraqi Dinar

ISO Currency Code	Description
IRR	Iranian Rial
ISJ	Old Krona
ISK	Iceland Krona
ITL	Italian Lira
JMD	Jamaican Dollar
JOD	Jordanian Dinar
JPY	Yen
KES	Kenyan Shilling
KGS	Som
KHR	Riel
KMF	Comoro Franc
KPW	North Korean Won
KRW	Won
KWD	Kuwaiti Dinar
KYD	Cayman Islands dollar
KZT	Tenge
LAJ	Kip Pot Pol
LAK	Kip
LBP	Lebanese Pound
LKR	Sri Lanka Rupee
LRD	Liberian Dollar
LSL	Loti
LSM	Maloti
LTL	Lithuanian Litas
LTT	Talonas
LUC	Convertib Francl
LUF	Luxembourg Franc

ISO Currency Code	Description
LUL	Financial Franc
LVL	Latvian Lats
LVR	Latvian Ruble
LYD	Libyan Dinar
MAD	Moroccan Dirham
MAF	Mali Franc
MDL	Moldovan Leu
MGF	Malagasy Franc
MKD	Denar
MLF	Mali Franc
MMK	Kyat
MNT	Tugrik
MOP	Pataca
MRO	Ouguiya
MTL	Maltese Lira
MTP	Maltese Pound
MUR	Mauritius Rupee
MVQ	Maldive Rupee
MVR	Rufiyaa
MWK	Malawian Kwacha
MXN	Mexican Peso
MXP	Mexican Peso
MXV	Mexican UDI
MYR	Malaysian Ringgit
MZE	Mozambique Escudo
MZM	Metical
NAD	Namibia Dollar

ISO Currency Code	Description
NGN	Naira
NIC	Cordoba
NIO	Cordoba Oro
NLG	Netherlands Guilder
NOK	Norwegian Krone
NPR	Nepalese Rupee
NZD	New Zealand Dollar
OMR	Rial Omani
PAB	Balboa
PEI	Inti
PEN	Nuevo Sol
PES	Sol
PGK	Kina
PHP	Philippine Peso
PKR	Pakistan Rupee
PLN	Zloty
PLZ	Zloty
PTE	Portuguese Escudo
PYG	Guarani
QAR	Qatari Rial
ROK	Leu A/52
ROL	Leu
RUB	Russian Ruble
RUR	Russian Federation Rouble
RWF	Rwanda Franc
SAR	Saudi Riyal
SBD	Solomon Islands

ISO Currency Code	Description
SCR	Seychelles Rupee
SDD	Sudanese Dinar
SDP	Sudanese Pound
SEK	Swedish Krona
SGD	Singapore Dollar
SHP	St Helena Pound
SIT	Tolar
SKK	Slovak Koruna
SLL	Leone
SOS	Somali Shilling
SRG	Surinam Guilder
STD	Dobra
SUR	Rouble
SVC	El Salvador Colon
SYP	Syrian Pound
SZL	Lilangeni
THB	Baht
TJR	Tajik Ruble
TJS	Somoni
TMM	Manat
TND	Tunisian Dinar
TOP	Pa’anga
TPE	Timor Escudo
TRL	Turkish Lira
TTD	Trinidad Dollar
TWD	New Taiwan Dollar
TZS	Tanzanian Shilling

ISO Currency Code	Description
UAH	Hryvnia
UAK	Karbovanet
UGS	Uganda Shilling
UGW	Old Shilling
UGX	Uganda Shilling
USD	US Dollar
USN	US Dollar (Next day)
USS	US Dollar (Same day)
UYN	Old Uruguay Peso
UYP	Uruguayan Peso
UYU	Peso Uruguayo
UZS	Uzbekistan Sum
VEB	Bolivar
VNC	Old Dong
VND	Dong
VUV	Vatu
WST	Tala
XAF	CFA Franc BEAC
XAG	Silver
XAU	GOLD
XBA	European Composite Unit
XBB	European Monetary Unit
XBC	European Unit of Account 9
XBD	European Unit of Account 17
XCD	East Caribbean Dollar
XDR	SDR
XEU	EU Currency (E.C.U)

ISO Currency Code	Description
XFO	Gold-Franc
XFU	UIC-Franc
XOF	CFA Franc BCEAO
XPD	Palladium
XPF	CFP Franc
XPT	Platinum
XTS	For Testing Purposes
XXX	Non Currency Transaction
YDD	Yemeni Din
YER	Yemeni Rial
YUD	New Yugoslavian Dinar
YUM	New Dinar
YUN	Yugoslavian Dinar
ZAL	Financial Rand
ZAR	Rand
ZMK	Zambian Kwacha
ZRN	New Zaire
ZRZ	Zaire
ZWC	Rhodesian Dollar
ZWD	Zimbabwe Dollar

Glossary of PeopleSoft Terms

absence entitlement — This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.

absence take — This element defines the conditions that must be met before a payee is entitled to take paid time off.

accounting class — In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.

accounting date — The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.

accounting split — The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.

accumulator — You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

action reason — The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template — In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

activity — In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

agreement	In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
AR specialist	Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
assessment rule	In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
book	In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business event	In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).

business unit — A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.

buyer — In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.

catalog item — In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.

catalog map — In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog.

catalog partner — In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.

categorization — Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.

channel — In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.

ChartField — A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.

ChartField balancing — You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.

ChartField combination edit — The process of editing journal lines for valid ChartField combinations based on user-defined rules.

ChartKey — One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.

checkbook — In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.

Class ChartField — A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*

clone — In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.

collection — To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.

collection rule In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

compensation object In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.

compensation structure In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.

condition In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.

configuration parameter catalog Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.

configuration plan In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.

content reference Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.

context In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.

In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.

control table Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.

cost profile A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.

cost row A cost transaction and amount for a set of ChartFields.

current learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.

data acquisition In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).

data elements Data elements, at their simplest level, define a subset of data and the rules by which to group them.

For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.

dataset A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.

delivery method type In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

directory information tree In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.

document sequencing A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.

edit table A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.

effective date A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.

EIM ledger Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

elimination set In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

equitization In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

event A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.

event propagation process In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects.

	Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.
fund	In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
group	In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).
	In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
incentive rule	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
incur	In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
item	In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).
	In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.
	In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.
KPI	An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file — Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft data and directory data.

learner group — In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.

learning components — In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.

learning environment — In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.

learning history — In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.

ledger mapping — You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

library section — In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.

linked section — In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.

linked variable — In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.

load — In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.

local functionality — In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.

location — Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.

logistical task — In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

market template In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.

match group In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

MCF server Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

merchandising activity In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

meta-SQL Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

metastring Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

multibook In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

multicurrency The ability to process transactions in a currency other than the business unit's base currency.

national allowance In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

node-oriented tree A tree that is based on a detail structure, but the detail values are not used.

pagelet Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

participant In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.

participant object Each participant object may be related to one or more compensation objects.

See also *compensation object.*

partner A company that supplies products or services that are resold or purchased by the enterprise.

pay cycle In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.

pending item In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

PeopleCode
: PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.

PeopleCode event
: An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.

PeopleSoft Internet Architecture
: The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.

performance measurement
: In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.

period context
: In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.

plan
: In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.

plan context
: In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.

plan template
: In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.

planned learning
: In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.

planning instance
: In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.

portal registry
: In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.

price list
: In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.

price rule
: In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

price rule condition In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.

price rule key In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.

process category In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.

process group In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.

process definition Process definitions define each run request.

process instance A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.

process job You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.

process request A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.

process run control A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.

product category In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.

programs In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.

progress log In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.

project transaction In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.

promotion In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.

publishing In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.

record group A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.

record input VAT flag Abbreviation for *record input value-added tax flag.* Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.

record output VAT flag
Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

reference data
In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.

reference object
In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

reference transaction
In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction’s budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

regional sourcing
In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

relationship object
In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

remote data source data
Data that is extracted from a separate database and migrated into the local database.

REN server
Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester
In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

role
Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

role user
A PeopleSoft Workflow user. A person’s role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.

roll up
In a tree, to roll up is to total sums based on the information hierarchy.

run control
A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.

run control ID
A unique ID to associate each user with his or her own run control table entries.

run-level context — In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.

search query — You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.

section — In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.

security event — In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

serial genealogy — In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production — In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

session — In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

session template — In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

setup relationship — In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

share driver expression — In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

single signon — With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.

source transaction — In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.

SpeedChart — A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.

SpeedType — A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

staging — A method of consolidating selected partner offerings with the offerings from the enterprise’s other partners.

statutory account — Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.

step — In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.

storage level — In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.

subcustomer qualifier — A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.

Summary ChartField — You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).

summary ledger — An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.

summary time period — In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.

summary tree — A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.

syndicate — To distribute a production version of the enterprise catalog to partners.

system function — In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.

TableSet — A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.

TableSet sharing — Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.

target currency — The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.

template — A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.

territory — In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.

TimeSpan — A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.

trace usage
In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.

transaction allocation
In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.

transaction state
In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.

Translate table
A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.

tree
The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

unclaimed transaction
In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.

universal navigation header
Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

user interaction object
In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable
In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

VAT exception
Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.

VAT exempt
Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.

VAT exoneration
Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.

VAT suspension
Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.

warehouse
A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

work order — In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.

worksheet — A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

worklist — The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

XML schema — An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.

yield by operation — In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

zero-rated VAT — Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

Index

E

F

Q

R

X