PeopleSoft®

PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook

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PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook
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Contents

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Product and Item Management

About This PeopleBook

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

This preface discusses:

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

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

PeopleSoft Application Prerequisites

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

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

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

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

PeopleSoft Application Fundamentals

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

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

Related Documentation

This section discusses how to:

- Obtain documentation updates.
- Order printed documentation.

Obtaining Documentation Updates

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

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

See Also

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

Ordering Printed Documentation

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

- Web
- Telephone
- Email

Web

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

Telephone

Contact MMA Partners at 877 588 2525.

Email

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

See Also

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

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

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

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

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

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

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

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

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

See Appendix A, “ISO Country and Currency Codes,” ISO Currency Codes.

Comments and Suggestions

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

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

Or send email comments to doc@peoplesoft.com.

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

Common Elements in These PeopleBooks

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

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

Description Enter up to 30 characters of text.

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

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

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

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

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

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

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

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

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

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

Short Description — Enter up to 15 characters of text.

PeopleSoft Enterprise CRM Product and Item Management Preface

This preface discusses:

- Additional resources.
- PeopleSoft Enterprise Customer Relationship Management (PeopleSoft CRM) application fundamentals.
- PeopleSoft Enterprise CRM business object 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
PeopleBook documentation updates	Support, Documentation, Documentation Updates

Resource	Navigation
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 CRM system. This book contains important topics that apply to many or all PeopleSoft applications across the PeopleSoft CRM product line.

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

- CRM Multi-Product Foundation.

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

  This part discusses how to administer workers who perform tasks such as support or field service in PeopleSoft 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 Business Object Management

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

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

- Business Object Management Basics.

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

- Data Management for Organization Business Objects.

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

- Data management for Individual Business Objects.

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

- Business Object Management.

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

- Customer and Worker Data Integrations.

  This part discusses how to integrate customer and worker data with other systems.

See Also

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook

PeopleSoft 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 CRM applications. This is an essential companion to the PeopleSoft 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 CRM workflow, the Active Analytics Framework (AAF), 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, PeopleSoft Order Capture, and the PeopleSoft call center applications (PeopleSoft Support, PeopleSoft HelpDesk, and PeopleSoft HelpDesk for Human Resources).

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

- Solution management.

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

- Transaction Billing Processor Integration.

  PeopleSoft Transaction Billing Processor enables PeopleSoft Integrated FieldService, PeopleSoft Support, and PeopleSoft Order Capture to integrate with PeopleSoft Billing and PeopleSoft General Ledger through the use of the PeopleSoft Contracts architecture. The integration enables PeopleSoft CRM users to bill and book revenue for recurring, one-time, and on demand services.

- Solution management.

  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 activities through the Map Dashboard.

See Also

PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook

PeopleTools PeopleBooks

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

PART 1

Getting Started

CHAPTER 1

Getting Started with PeopleSoft Enterprise Customer Relationship Management 8.9 Product and Item Management

This chapter provides an overview of PeopleSoft Customer Relationship Management (PeopleSoft CRM) and discusses product and item integrations.

PeopleSoft CRM Product and Item Management Overview

In PeopleSoft CRM, products are what you sell and support. Almost all customer-facing PeopleSoft CRM applications reference product data, including (but not limited to) PeopleSoft CRM: Field Service, Support and Help Desk, Sales, Order Capture, and Marketing. You can group and present product information in catalogs for use by the sales force or by self-service applications, plan sales and marketing campaigns around products, manage product portfolios, or identify the competencies required to service and support a product and use that to assign workers to service and support tasks.

This book discusses setup tasks and data management for products and items in PeopleSoft CRM, including how to define and price product packages and standalone products.

PeopleSoft CRM Product and Item Integrations

PeopleSoft CRM integrates with PeopleSoft Supply Chain Management (SCM) and with other SCM, or order fulfillment, systems. SCM systems use product definitions to manage products and product components throughout the manufacturing process. PeopleSoft CRM delivers several enterprise integration points (EIPs) that maintain data integrity between PeopleSoft CRM and third-party SCM systems by synchronizing product and item data.

PeopleSoft CRM Product and Item Implementation

PeopleSoft Setup Manager enables you to review a list of setup tasks for your organization for the products that you are implementing. The setup tasks include the components that you must set up, listed in the order in which you must enter data into the component tables, as well as the corresponding PeopleBook documentation.

You set up products and items as part of the implementation process for PeopleSoft CRM products such as PeopleSoft Integrated FieldService and PeopleSoft Order Capture.

PART 2

Product and Item Management

CHAPTER 2

Understanding Products and Items in PeopleSoft CRM

This chapter discusses:

- Products.
- Items.
- The relationship between products and items.

Products

Products in PeopleSoft Customer Relationship Management (PeopleSoft CRM) are what you sell to customers. You might sell physical goods such as cars or refrigerators or intangible services (also known as service products) such as 3000-minute rate plans for wireless phones.

Product Definitions

PeopleSoft CRM represents products by product definitions. A product definition, keyed by product ID and setID, stores all of the product information that company representatives reference to sell or support products.

A product definition and its associated price setup provide the foundation for many features of PeopleSoft CRM, which include product ordering, catalogs, catalog searches, product advisor dialogs, dynamic product packages, and configured products that are accessed from applications such as PeopleSoft Order Capture, PeopleSoft Order Capture Self Service, PeopleSoft Sales, PeopleSoft Advanced Configurator, and so forth. You also use products in PeopleSoft Integrated FieldService, PeopleSoft Support, and PeopleSoft HelpDesk for on-site and off-site customer support processing.

Use the Product Definition component to define products. If you implement both PeopleSoft CRM and PeopleSoft Supply Chain Management (PeopleSoft SCM) or another third-party supply chain management system, you can use the Product enterprise integration point (EIP) to synchronize product data between the two systems.

Note. If you integrate between PeopleSoft CRM and a supply chain management system, you should define all product records in the PeopleSoft CRM system to take advantage of functionality, such as dynamic product packages and configured products, that are offered only in PeopleSoft CRM.

Types of Product Definitions

The types of product definitions in PeopleSoft CRM are:

- Engagement service.

Engagement services are services such as consulting that are priced by PeopleSoft Proposal Management. PeopleSoft CRM integrates with PeopleSoft Proposal Management to exchange quote, status, and pricing information.

See Chapter 7, "Setting Up Products," Integrations with PeopleSoft SCM and PeopleSoft Proposal Management, page 52.

- Service agreement.

  Service agreements are agreements with a company to provide services, such as repair and maintenance, for a product or to provide a service such as satellite TV or lawn care that is purchased by a customer. Service agreements are priced through the service pricing engine, and do not use the product price or price rule features to retrieve a price. When you set up a service agreement product type, you first set up the agreement template that defines the service that are provided by the agreement.

  See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, "Setting Up and Managing Agreements and Warranties" and *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, "Defining Pricing Information for Services and Support Offerings".

- Service product.

  Service products, such as cellular phone service, are not physical items that are inventoried. The customer purchases the service and not a physical product.

- Standard product.

  Standard, or standalone, products do not contain components. You can designate that standalone product is a configured product by selecting the configuration option. When you define a product, you select whether it is standalone or contains components.

- Package product.

  Product packages contain more than one component. A product package can include other packages and are priced either at the product level or as the sum of the package components. When you define a product package, you designate the pricing method.

See Also

Chapter 3, "Setting Up Product Definitional Elements," page 11

Chapter 7, "Setting Up Products," page 51

Items

Items are tangible goods or materials that an organization keeps in stock for sale or use in the future. You use items to keep track of material stocks—goods that are located in physical storage locations such as warehouses, storerooms, or service trucks—in the inventory control system.

Item Definition

You define items either by using the Item Definition component or by using the Item Master EIP (enterprise integration point) to integrate with an inventory or purchasing system.

Because the synchronization of item definitions is one-way from the inventory or purchasing system to the PeopleSoft CRM system, PeopleSoft suggests that you create and update item records in the inventory or purchasing system, then publish them to PeopleSoft CRM.

Note. If you integrate with an inventory or purchasing system, you are unable to update the item definition within PeopleSoft CRM.

See Also

Chapter 4, "Defining Items," page 19

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, "Ordering and Receiving Materials"

The Relationship Between Products and Items

In PeopleSoft CRM, a product is associated with only one item (one-to-one relationship). For any physical product that you sell in-store, there is an item equivalent in the inventory system, which establishes the one-to-one relationship. You stock the item on the warehouse shelf and use it for fulfilling orders of that product.

More than one product can use the same item. This typically happens when you position or price the same item differently for different product lines.

A product is not required to have an associated item. For example, a 3000-minute rate plan for wireless phones does not have a physical equivalent on a storage shelf and, therefore, is not associated with any item in the inventory system.

Items are associated with products for fulfillment and servicing purposes in PeopleSoft CRM.

See *PeopleSoft Managing Items 8.8 PeopleBook*

See *PeopleSoft Order Management 8.8 PeopleBook*.

See Chapter 9, "Tracking Installed Products," Defining Creation and Update Rules for Installed Products, page 107.

Items in PeopleSoft Integrated FieldService

In PeopleSoft CRM, products are used in the Installed Product and Services component and are required. Items are an option in the Installed Product and Services component. The Installed Assets component is for internal assets that are used in PeopleSoft HelpDesk.

Service technicians order items that they need to perform service using the Order Materials component, either as an interunit transfer or purchase order. After the purchasing or inventory system processes the order and ships an item to the technician's truck, the technician installs the item and uses the Time Material Expense page within the Service Order component to report the receipt and usage of the new item, as well as the removal of the old one.

You can set up rules to govern when the system creates or changes the status of installed products.

For example, the system creates an installed product or changes its status when:

- A product is ordered through PeopleSoft Order Capture.
- An automatic shipping notification (ASN) for the product is received from a fulfillment system.
- A material usage or removal is recorded in PeopleSoft Integrated FieldService.

When these activities occur, the PeopleSoft CRM system passes product information along with the inventory system serial number (if applicable) to the installed product .

For example, an electrical appliance retailer might keep stock in a warehouse. The inventory system associates each product with an item on the warehouse shelf. When a customer places a product order and the order comes through the fulfillment system, the associated item of the product is picked from the warehouse and shipped.

The serial number is sent as part of the ASN message, which triggers either the creation of an installed product for the shipped product or an update of the existing installed product for that product.

CHAPTER 3

Setting Up Product Definitional Elements

This chapter provides an overview of product definitional elements in PeopleSoft Enterprise Customer Relationship Management (PeopleSoft CRM) and discusses how to create product definitional elements.

Understanding Product Definitional Elements

Definitional elements describe products in the PeopleSoft CRM system. You must set up these definitional elements before defining products in PeopleSoft CRM:

- Product installation options.
- Rules for generating product ID numbers.
- Rule sets for creating and updating installed products.
- Product groups.

  Product groups enable you to share processing parameters between products. PeopleSoft CRM delivers a set of basic product groups.
- Product categories.

  Product categories are used to group products in catalogs.
- Product brands.
- Competitor codes.

  Competitor codes enable you to keep track of competitor's similar products.
- Branch scripts.

  Branch scripts predefine sales dialogue with customers, provide direction to customer service representatives, and guide internal processes and operations.
- Region IDs.

  Region IDs enable selling by region.
- Competency codes.

  Competency codes define skills required to support the product.
- Relationship IDs.

  Relationship IDs define the relationship of one product to another. For example, one product might either complement or substitute for another product.
- Product attributes

  Product attributes describe characteristics of the product, such as height, weight, color, and so forth.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "Setting Up General Options," Setting Up Automatic Numbering

Chapter 4, "Defining Items," page 19

Chapter 9, "Tracking Installed Products," page 101

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "Managing Workforce Competencies"

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "Setting Up General Options," Setting Up Regions

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

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, "Defining Scripts"

Creating Product Definitional Elements

To create product definitional elements, use the Product Installation (PROD_INSTALLATION), Automatic Numbering (AUTO_NUM_PNL), Product Group (PROD_GROUP_TBL), Product Category (PROD_CATEGORY), Product Brand (PROD_BRAND), Competitors (COMPETITOR_CD), Region (RB_REGION), and Attribute Definition (RB_ATTRIBUTE) components.

This section lists the pages used to set up product definitional elements and discusses how to:

- Select options for managing products.
- Specify installed product rules.
- Define product automatic numbering options.
- Define product group codes.
- Define branch scripts.
- Set up product relationship codes.
- Define product attributes.

Pages Used to Set Up Product Definitional Elements

Page Name	Object Name	Navigation	Usage
Product Installation	PROD_INSTALLATION	Set Up CRM, Install, Product Options, Product Installation	Select options for managing products.
Installed Product Defaults	RF_INSTPRD_DFLT	Set Up CRM, Install, Product Options, Installed Product Defaults	Specify rules that determine how system transactions create and update installed products.
Auto Numbering (automatic numbering)	AUTO_NUM_PNL	Set Up CRM, Common Definitions, Codes and Auto Numbering, Automatic Numbering, Auto Numbering	Define automatic numbering options for product IDs.
Product Group	PROD_GROUP_TBL	Products CRM, Product Groups, Product Groups	Define product group codes.
Linked Products	PROD_GRP_OVERVIEW	Products CRM, Product Groups, Linked Products	View products that belong to a product group.
Product Category	PROD_CATEGORY	Products CRM, Category, Product Category	Define product category codes.
Product Brand	PROD_BRAND	Products CRM, Brand, Product Brand	Define product brand codes.
Competitors	COMPETITOR_CD	Products CRM, Competitor Codes, Competitor Codes	Define competitor codes.
Script	RC_BS_MAIN	Set Up CRM, Common Definitions, Process Automation, Script, Script	Define a branch script for support and sales personnel.
Region	RB_REGION, RB_REGION	Set Up CRM, Common Definitions, Location, Region Codes, Region	Set up regions.
Competencies	COMPETENCY_TABLE	Set Up CRM, Common Definitions, Competencies, Competencies	Establish competency codes.
Product Relations Codes	RB_RELATIONS	Products CRM, Product Relations Codes, Product Relations Codes	Set up the codes that describe relationships between products.
Attribute Definition	RB_ATTRIBUTE_MAIN	Set Up CRM, Common Definitions, Attributes, Attribute Definition, Attribute Definition	Define a product attribute.

Selecting Options for Managing Products

Access the Product Installation page.

Product Installation page

Item Required

Select if you have installed PeopleSoft Supply Chain Management (PeopleSoft SCM) or PeopleSoft Integrated FieldService. You can clear this check box if the order fulfillment system does not require items or if products are not inventoried.

If you select this check box, you must use the Item Definition component to define product IDs, descriptions, and standard units of measure. You then complete the product definition in the Product Definition component.

Components can be deleted

Select to enable deletion of components in a product package.

Alternate Priority Required and **Alternate Quantity Required**

Select to enter a priority and quantity on the Product Relationships page for an Alternate relationship type. Select these check boxes when the PeopleSoft CRM system is integrated with PeopleSoft SCM.

See Also

Chapter 4, “Defining Items,” page 19

Specifying Installed Product Rules

Access the Installed Product Defaults page.

See Chapter 9, “Tracking Installed Products,” page 101.

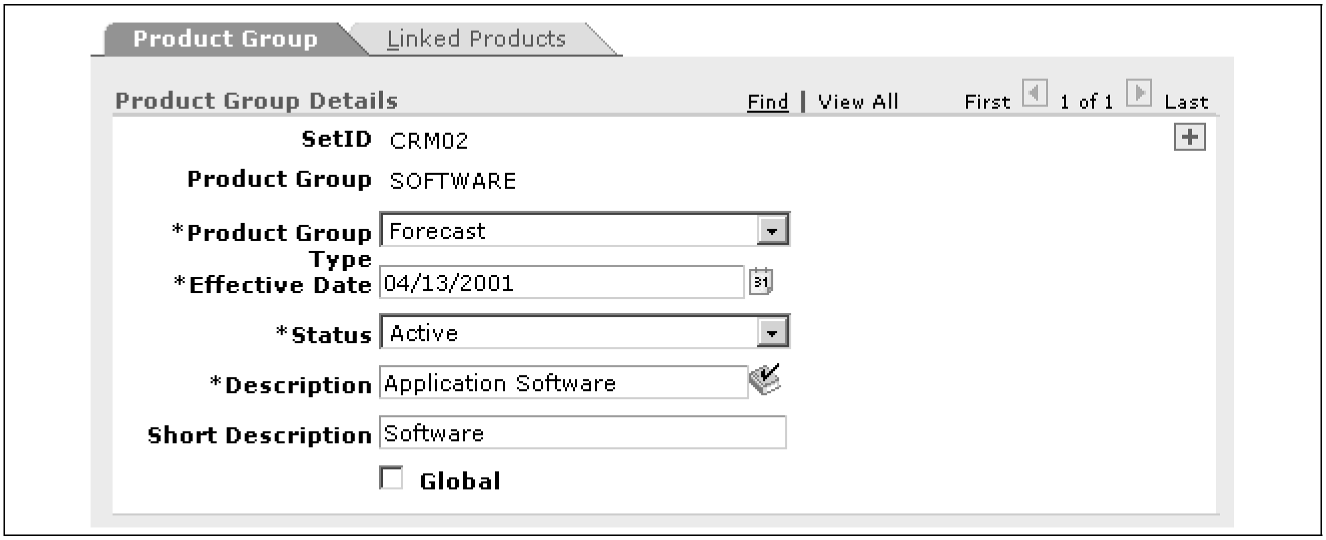
Defining Product Automatic Numbering Options

Access the Auto Numbering page.

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

Defining Product Group Codes

Access the Product Groups page.



Product Group page

Product Group Type Select the product group type from the available values.

Global Select to include all products in the product group.

Note. This selection is not used for product groupings in the catalog.

See Chapter 8, "Creating Catalogs," Understanding Catalogs, page 73.

See Also

Chapter 7, "Setting Up Products," Adding Products to Product Groups, page 62

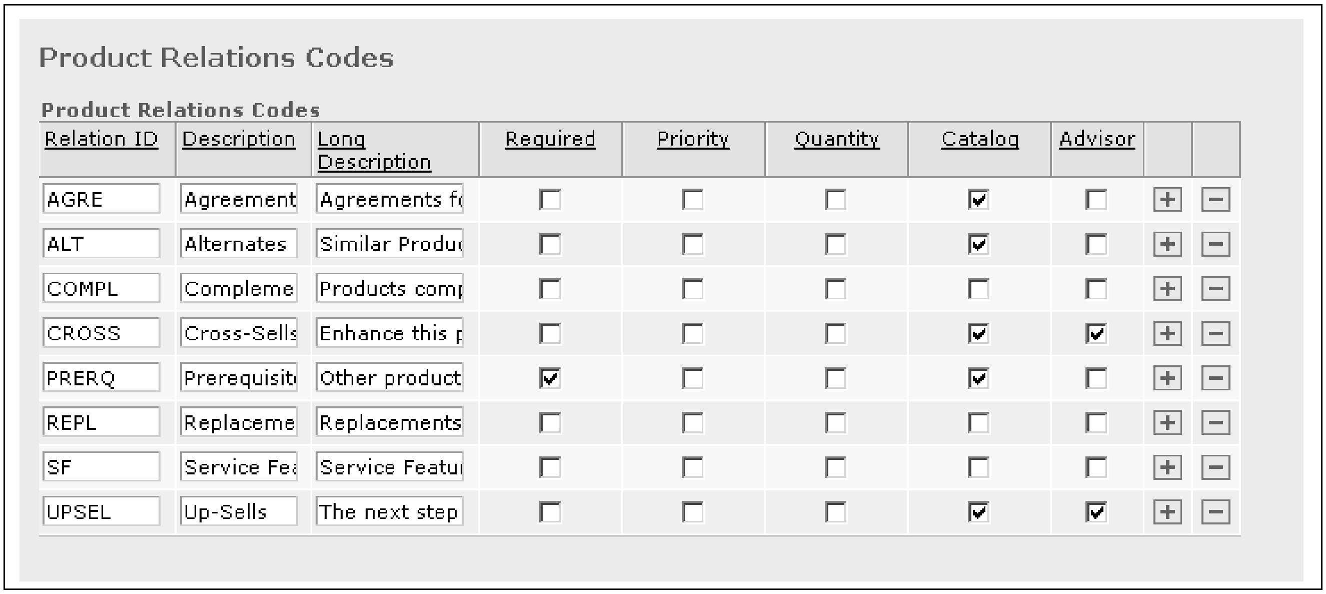
Defining Branch Scripts

Access the Script page.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, "Defining Scripts".

Setting Up Product Relationship Codes

Access the Product Relations Codes page.



Product Relations Codes

Product Relations Codes

Relation ID	Description	Long Description	Required	Priority	Quantity	Catalog	Advisor		
AGRE	Agreement	Agreements fo	☐	☐	☐	☑	☐	+	−
ALT	Alternates	Similar Produc	☐	☐	☐	☑	☐	+	−
COMPL	Compleme	Products comp	☐	☐	☐	☐	☐	+	−
CROSS	Cross-Sells	Enhance this p	☐	☐	☐	☑	☑	+	−
PRERQ	Prerequisite	Other product	☑	☐	☐	☑	☐	+	−
REPL	Replaceme	Replacements	☐	☐	☐	☐	☐	+	−
SF	Service Fea	Service Featu	☐	☐	☐	☐	☐	+	−
UPSEL	Up-Sells	The next step	☐	☐	☐	☑	☑	+	−

Product Relations Codes page

The Relations page lists the possible relationships among products. The options that you select for a relationship type determine the options that are available on the Product Relationships page when you define a product.

Required Select to include the Required check box on the Product Relationships page. The Required check box enables you to require that the related product is present whenever the listed product appears.

Priority Select to include the Priority check box on the Product Relationships page. The Priority check box enables you to specify a priority among alternative related products.

Quantity Select to include the Quantity field on the Product Relationships page. The Quantity field enables you to specify how many times the given relationship can occur.

Catalog Select to include the Catalog check box on the Product Relationships page. The Catalog check box controls whether related products appear in the catalog along with the main product.

Advisor Select to enable the use of the PeopleSoft Real-Time Advisor for up-sell and cross-sell opportunities.

Note. The product relations codes that appear in the preceding example are delivered as system data. You can add relations, but you should not remove any delivered relations.

See Also

Chapter 7, “Setting Up Products,” Managing Product Relationships, page 70

PeopleSoft Enterprise CRM Real-Time Advisor 8.9 PeopleBook

Defining Product Attributes

Access the Attribute Definition page.

Warning! Although product attributes provide flexibility for modeling products, attributes can adversely affect runtime performance. PeopleSoft suggests that you not use more than a few attributes per product.

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

CHAPTER 4

Defining Items

This chapter provides an overview of item definition in PeopleSoft Customer Relationship Management (PeopleSoft CRM) and discusses how to:

- Define item control values.
- Define and maintain items.
- Associate items with additional units of measure (UOMs).

Understanding Item Definition in PeopleSoft CRM

An item must be available in PeopleSoft CRM system tables before you can reference it on an installed product, define material requirements for a service, use it to complete work on a service order, or create a return material authorization enabling a customer to return it.

To define items, use the Item Definition component, or use the Item Master enterprise integration point (EIP) to synchronize PeopleSoft CRM item definition records with item records that you defined in the inventory and purchasing system.

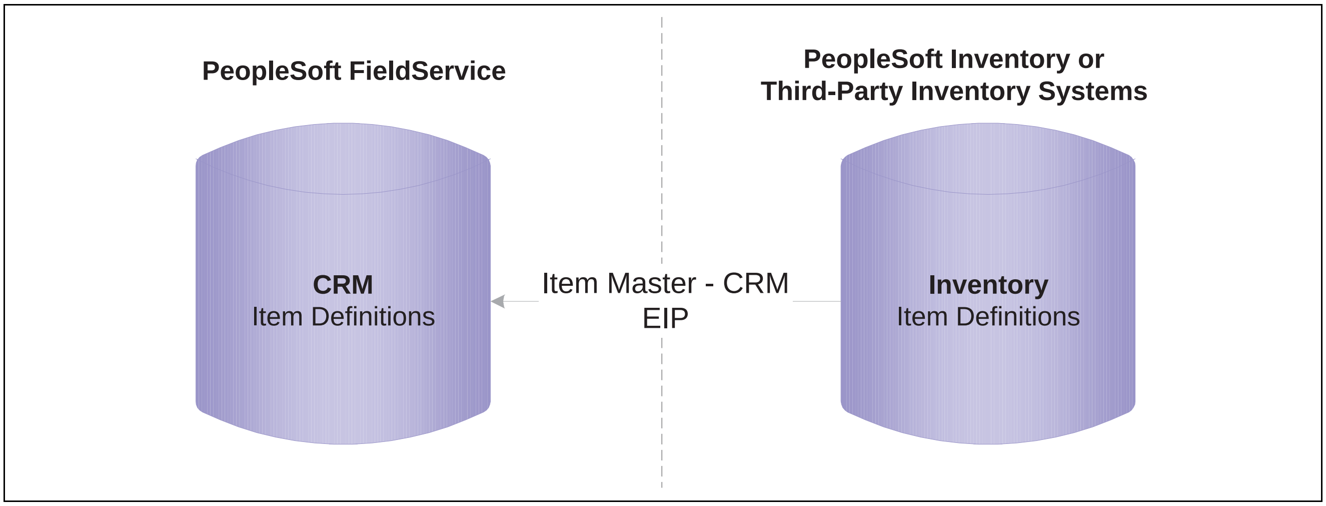
Important! To process material management transactions that take place in PeopleSoft CRM and the inventory and purchasing system, the definition of the item on the transaction must be identical in both systems. If you do not use the Item Master EIP to keep item information synchronized, you must manually duplicate changes or additions to item records in both systems.

The Item Master EIP includes three publishing application messages:

- ITEM_CRM_FULLSYNC_EFF
- ITEM_CRM_SYNC_EFF
- ITEM_CRM_SYNC

At initial implementation, the inventory and purchasing system publishes a full set of item records to the PeopleSoft CRM system using the ITEM_CRM_FULLSYNC_EFF application message. When you add or modify item definitions in the inventory and purchasing system after the initial synchronization, each is published to PeopleSoft CRM using the ITEM_CRM_SYNC and ITEM_CRM_SYNC_EFF application messages. PeopleSoft CRM is a subscriber to, not a publisher of, these messages. Any changes that you make to item definitions in PeopleSoft CRM are not published or synchronized with the inventory and purchasing system.

When the messages of the Item Master EIP are activated, you cannot use the Item Definition component in PeopleSoft CRM to change or add item records. You must make all updates to item records in the inventory and purchasing system and publish them to PeopleSoft CRM, as this diagram illustrates:



Data flow from inventory and purchasing system to PeopleSoft CRM

See Also

PeopleSoft Enterprise Components PeopleBook

PeopleSoft Financials, Enterprise Service Automation, and Supply Chain Management Applications Fundamentals 8.8 PeopleBook

Item Status

This table lists the statuses that items can have in PeopleSoft CRM:

Status	Description
Under Initialization	The item definition has not been completed. No transactions are permitted, and the system does not list the item in any prompts. **Note.** PeopleSoft Inventory and Purchasing do not publish item definition records for items with an Under Initialization status. Only items defined in PeopleSoft CRM using the Item Definition component can have this status.
Pending Approval	The item definition has been completed and is awaiting approval. No transactions are permitted, and the system does not list the item in any prompts. Pending approval items are not sent from inventory until approval occurs.
Denied Approval	The item definition has been denied. No transactions are permitted, and the system does not list the item in any prompts. **Note.** In PeopleSoft CRM, item definition approval processing is a manual business process. PeopleSoft Inventory and Purchasing do not publish item definition records for items with *Pending Approval* or *Denied Approval* status. Only items that are defined in PeopleSoft CRM using the Item Definition component can have these status values.
Active	The item definition is active in the system. Items with an *Active* status are eligible for all item transactions in PeopleSoft CRM.

Status	Description
Hold	The item definition is on hold in the system.
Inactive	The item is no longer active in the system.
Discontinue	Usage of the item is being phased out. **Note.** In PeopleSoft CRM, you can receive and report usage and removal for an item with a *Hold, Inactive,* or *Discontinue* status using the Order Materials and Service Order components in PeopleSoft Integrated FieldService. You can also create a return material authorization (RMA) for customers that are returning the item using the RMA Form (return material authorization form) component in PeopleSoft Support. However, you cannot enter a request to order any quantity of the item using the Order Materials component, nor can you create replacement orders for the item using the RMA Form component.

See Also

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, "Ordering and Receiving Materials"

PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook, "Managing Material Returns"

PeopleSoft Financials, Enterprise Service Automation, and Supply Chain Management Applications Fundamentals 8.8 PeopleBook

Defining Item Control Values

To define item control values, use the Item Number Control (INV_ITEM_CONTROL), (Item Groups (INV_ITEM_GROUP), Item Families (INV_PROD_FAMILIES), and Stock Types (INV_STOCK_TYPE) components.

This section discusses how to:

- Specify item numbering.
- Define item groups.
- Define item families.
- Define stock types.

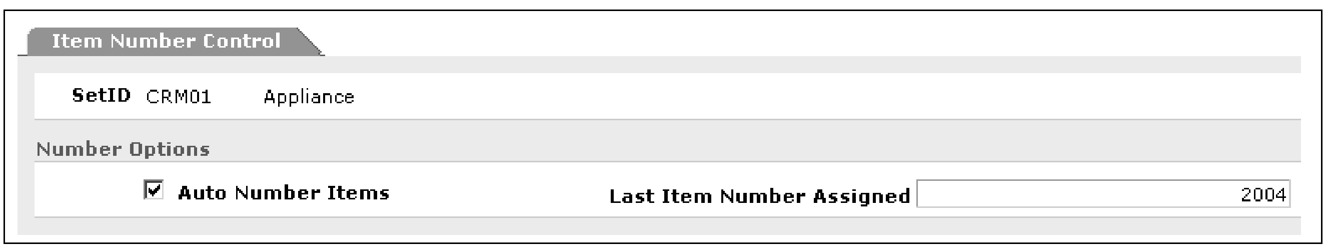
Note. Item control values in PeopleSoft CRM are used only if you synchronize them with PeopleSoft Supply Chain Management (PeopleSoft SCM) applications, including PeopleSoft Inventory and Purchasing. If you synchronize item records with another system, the Item Master EIP application messages do not update any control value information that is documented in this section.

Pages Used to Define Item Control Values

Page Name	Object Name	Navigation	Usage
Item Number Control	ITEM_NBR_CONTROL	Items CRM, Item Number Control, Item Number Control	Define whether new items are numbered sequentially or manually.
Item Groups	INV_ITEM_GROUP	Items CRM, Item Groups, Item Groups	Define groups to categorize items. You can use item group as an alternate search key for Item ID.
Item Families	PROD_FAMILY_INV	Items CRM, Item Families, Item Families	Define families to which items can be assigned during the item definition process. You can use item family as an alternate search key for the item ID.
Stock Types	INV_STOCK_TYPE	Items CRM, Stock Types, Stock Types	Create ownership information codes for inventory items that are leased or consigned. You must specify stock types for any non-owned items that you define on the Item Definition page.

Specifying Item Numbering

Access the Item Number Control page.



Item Number Control page

Note. The item number controls that you define on this page are used for PeopleSoft CRM purposes only. If you synchronize item records with another system, the Item Master EIP application messages do not update item number control information.

Auto Number Items

Select to enable automatic numbering. When automatic numbering is enabled, you can accept the system-generated *NEXT* value as the ID for each item that you define. Even if automatic numbering is enabled, you can override the *NEXT* value by entering item IDs manually.

Note. If you do not select this check box, you must enter IDs manually when defining new items on the Item Definition page.

Last Item Number Assigned

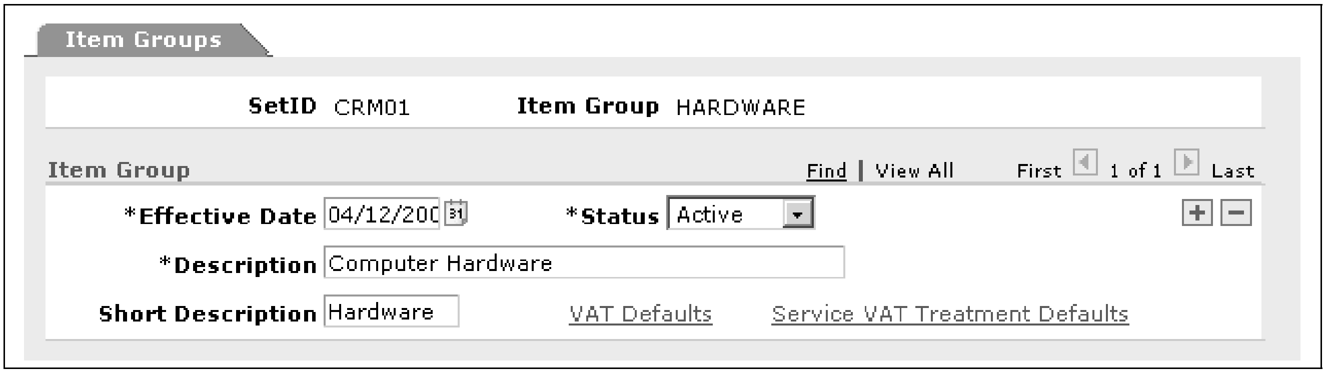
Enter the start of the numbering sequence that the system uses to generate unique item IDs automatically. When you select *NEXT* as the item ID during the item definition process, the system assigns the next sequential number in this numbering sequence as the item ID.

See Also

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

Defining Item Groups

Access the Item Groups page.



Item Groups page

Use this page to define groups that categorize items in PeopleSoft CRM. The concept of item groups originates from PeopleSoft Inventory. It is used on the Item Definition page for information purposes.

For more information on item groups, refer to *PeopleSoft Managing Items 8.8 PeopleBook*on defining item control values.

VAT Defaults

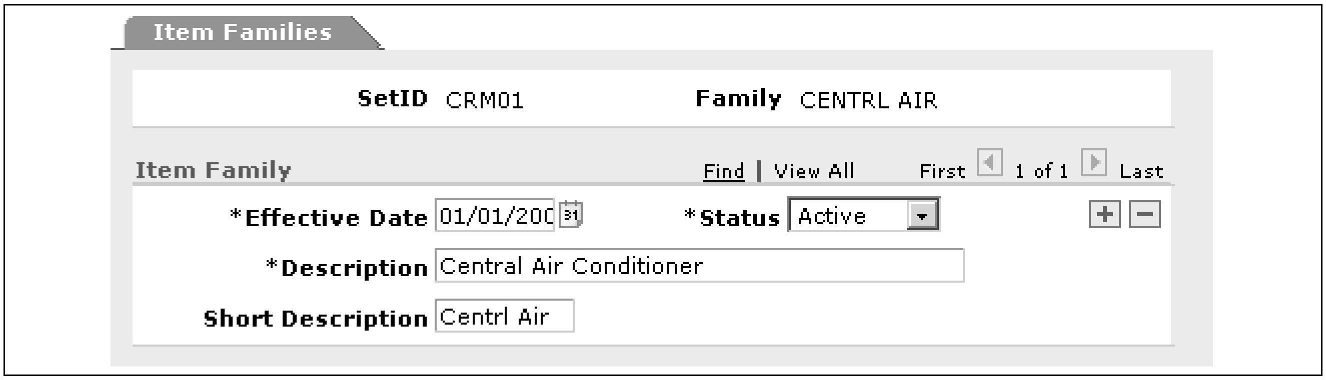
Click to access the VAT Defaults Setup page, which is a common page used to set up value-added tax (VAT) defaulting for all PeopleSoft applications that process VAT transactions. On this page you can define VAT defaults for bill sources, per VAT registration country and state.

Service VAT Treatment Defaults

Click to access the Service VAT Treatment Drivers Setup page, which is a common page used to set up VAT services treatment for all PeopleSoft applications that process VAT transactions. If you are required to implement special handling for services, you can specify VAT service treatment defaults for bill sources on this page for a supplier’s (seller’s) location country and state. VAT defaults are also used when integrating to PeopleSoft Transaction Billing Processor.

Defining Item Families

Access the Item Families page.



Item Families page

Use this page to define families with which items can be associated, besides item groups, during the item definition process in PeopleSoft CRM. Item families are the same as item groups. They are used on the Item Definition page for information purposes. There's no formal relationship established between item families and groups, but you can further categorize groups by using families.

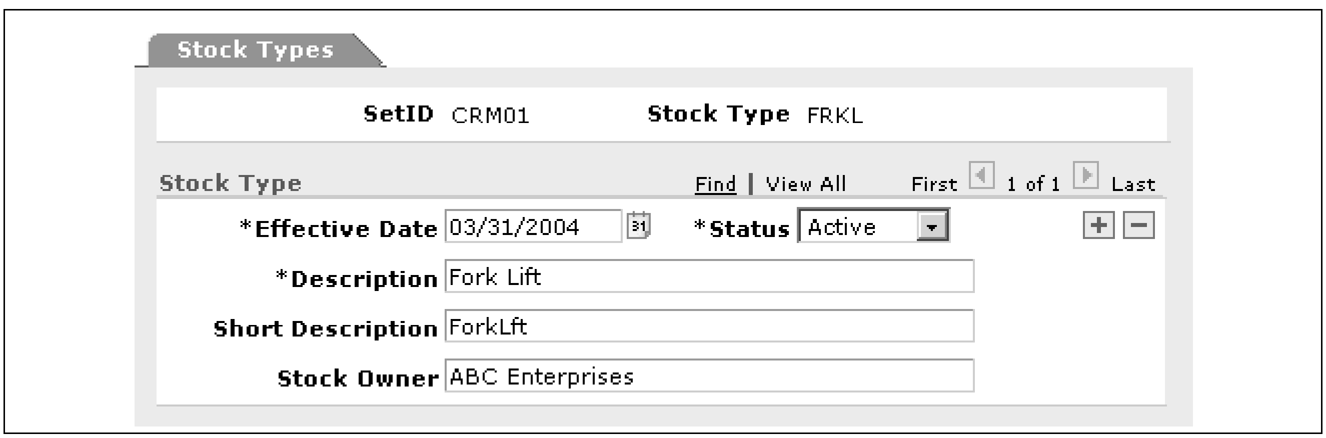
For example, you can define a group on *freezers* and create *freezer replacement parts* and *freezer accessories* as families of this group.

Fields in the Item Families and Item Groups pages are identical.

For more information on item families, refer to *PeopleSoft Managing Items 8.8 PeopleBook* on defining item control values.

Defining Stock Types

Access the Stock Types page.



Stock Types page

Use this page to create ownership information codes for inventory items that are leased or consigned.

For information on stock types, refer to *PeopleSoft Managing Items 8.8 PeopleBook* on defining item control values.

Defining and Maintaining Items

To define and maintain items, use the Item Definition (RF_ITEM_DEFN) component.

This section discusses how to:

- Define items.
- Establish substitute definitions.

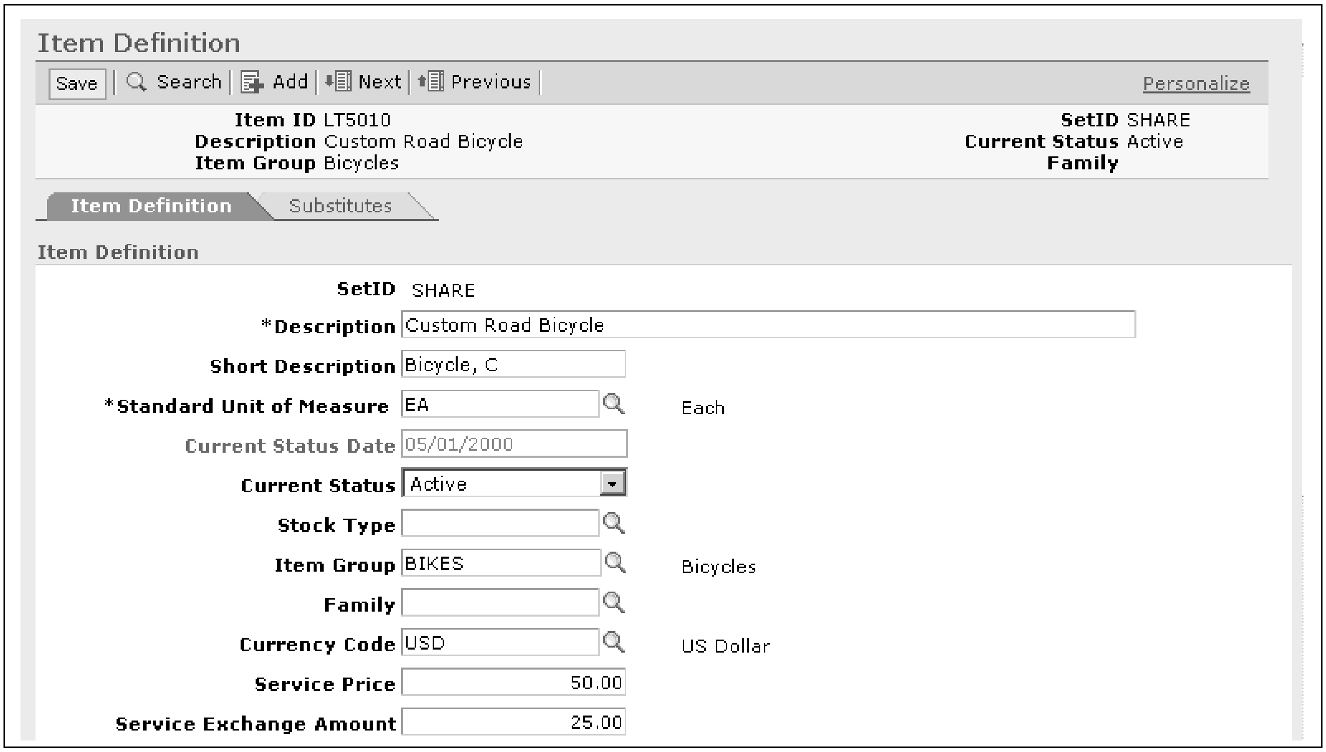
If you are synchronizing with another system using the Item Master EIP, you can view the current definition for an item in PeopleSoft CRM using the Item Definition component under Items CRM, Review Item Definition.

Pages Used to Define and Maintain Items

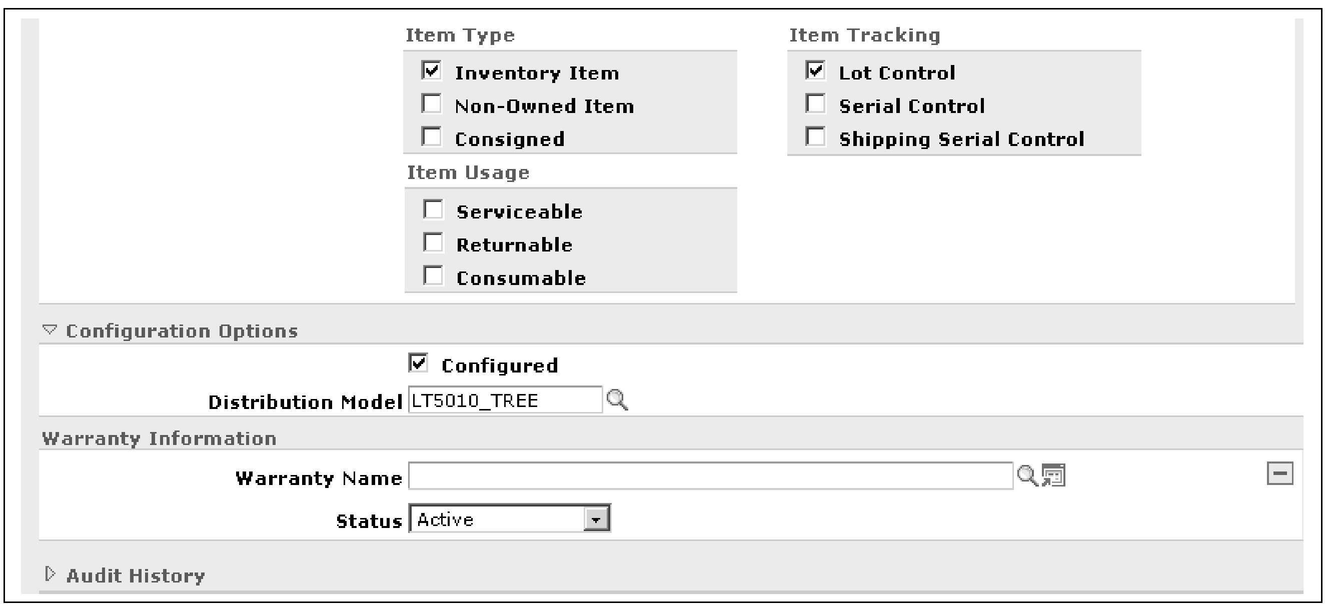
Page Name	Object Name	Navigation	Usage
Item Definition	RF_ITEM_DEFN	• Items CRM, Inventory Item Definition, Item Definition • Items CRM, Review Item Definition, Item Definition	Define inventory items at the setID level.
Substitutes	RF_ITEM_SUB	• Items CRM, Inventory Item Definition, Substitutes • Items CRM, Review Item Definition, Substitutes	Establish substitution definitions for items. An item substitution definition specifies alternate items that may be used by personnel requesting stock for activities on service orders. View an item’s substitution definition from the RMA Form component in PeopleSoft Support and from the Order Materials and Service Order component in PeopleSoft Integrated FieldService.

Defining Items

Access the Item Definition page.



Item Definition page (1 of 2)



Item Definition page (2 of 2)

Item Definition

Description and **Short Description** — Enter long and short descriptions. You cannot include embedded single or double quotation marks in the description text.

Standard Unit of Measure — Enter the base unit of measure for the item that reflects the smallest transactable UOM for the item. Establish UOMs on the Units of Measure page under Set Up CRM, Common Definitions.

Warning! To minimize rounding discrepancies when using multiple UOMs, the standard UOM must be the smallest valid UOM for the item. Also, set up the standard UOM as a whole number.

Current Status Date Displays the date on which the current status of the item definition was updated.

Stock Type Enter the owner of the stock if the item is non-owned. First, you must establish stock types on the Stock Types page.

Item Group Enter a group ID to categorize the item as an alternate search key. Establish item groups on the Item Groups page.

Family Enter a family ID to categorize the item as an alternate search key. Establish item families on the Item Families page.

Currency Code Enter the currency code used for the item.

Service Price Enter the price for the service item being defined.

Note. This is the price that is picked up for billing the customer when integrating with PeopleSoft Transaction Billing Processor for any materials that were used to service the customer.

Service Exchange Amount Enter the amount the customer will be credited if the old item is exchanged for the new one.

Note. This is the price that is used to credit the customer when performing a service order and removing material when integrating with PeopleSoft Transaction Billing Processor.

VAT Defaults Click to access the VAT Defaults Setup page, which is a common page used to set up value-added tax (VAT) defaulting for all PeopleSoft applications that process VAT transactions. On this page you can define VAT defaults for bill sources, per VAT registration country and state.

Service VAT Treatment Defaults Click to access the Service VAT Treatment Drivers Setup page, which is a common page used to set up VAT services treatment for all PeopleSoft applications that process VAT transactions. If you are required to implement special handling for services, you can specify VAT service treatment defaults for bill sources on this page for a supplier’s (seller’s) location country and state.

Product Options

When you create a new item or select an item with a current status of *Under Initialization,* the system displays the Product Options group box to establish whether a corresponding product definition should be created simultaneously with the item definition.

Create Product Select to create a corresponding product definition for this item.

Use Item ID Select to make the product ID the same as the item ID. If selected, the Product ID field becomes unavailable for entry.

Product ID Enter the ID for the product definition. If you set up automatic numbering for products, enter a value of *NEXT* to use the next available product ID.

Item Type

Inventory Item Select if the item is physically stocked in inventory. You cannot create transactions in PeopleSoft Inventory for non-inventory items.

Non-Owned Item Select if the item is non-owned. PeopleSoft Inventory does not create accounting entries for non-owned item transactions. If you define an item as non-owned, you must also specify a stock type.

Consigned Select if the item is consigned. Only non-owned items can be consigned.

Note. After an order for the item is initiated from the RMA Form component or the Order Materials component, the system does not enable values in the Item Type group box to be modified.

Item Tracking

Lot Control Select if the item is tracked by lot ID.

In PeopleSoft Integrated FieldService, you must enter the lot ID for transactions of lot-controlled items that are initiated on the Order Materials page and when defining installed product records for lot-controlled items on the Installed Product and Services component. You also specify the lot ID on the Time Material Expense page on the service order.

In PeopleSoft Support, you may enter the lot ID for advanced exchange RMA transactions of lot-controlled items; however, it is not required.

In PeopleSoft Inventory, you must enter the lot ID at the time of receipt and putaway and for all inventory movement transactions of lot-controlled items.

Serial Control Select to track each unit of the item in stock by a unique identifier. Serial-controlled inventory items are managed in units of one, based on the item's standard UOM.

In PeopleSoft Integrated FieldService, you must enter the serial ID for transactions of serial-controlled items that are initiated on the Order Materials page and when defining installed product records for serial-controlled items on the Installed Product page.

You also specify the serial ID on the Time Material Expense page on the service order.

In PeopleSoft Support, you must enter the serial ID for advanced return RMA transactions of serial-controlled items.

In PeopleSoft Inventory, you must enter the serial ID at the time of receipt and putaway and for all inventory movement transactions of serial-controlled items.

Shipping Serial Control Select to assign a unique identifier to each unit of the item if serial tracking is required only at the time of shipment. Until ship-serial-controlled items are shipped, you can move them to different stock locations within the PeopleSoft Inventory business unit without serial control, which simplifies transaction processing and entry.

Serial numbers are then assigned at the time of shipment to provide tracking on products shipped to customers, internal locations, and other PeopleSoft Inventory business units.

When a user records the quantity received, used, not used, and removed for a ship-serial-controlled item on the Order Materials page in PeopleSoft CRM, you must enter the ship-serial ID. The system uses this ID to accurately update the customer's installed product record.

Note. The reporting of materials used and removed can also be completed on the Time Material and Expense page.

Note. After an order for the item is initiated from the RMA Form component or the Order Materials component, the system does not enable values in the Item Tracking group box to be modified.

Item Usage

Serviceable

Select if a service can be performed on the item. You create services and service orders only for items that are serviceable. You specify products and installed products on the service order and items when you are ordering, receiving, using and removing materials.

Returnable

Select if the item can be returned. This data is for informational purposes only.

The removal of a nonreturnable item on the Time Material Expense page on the service order does not trigger any inventory adjustment transactions.

The system issues a warning if you try to return an item that is not identified as returnable using the RMA Form component. You can select to cancel or proceed with the transaction.

Consumable

Select if the item can be scrapped rather than returned. When the removal of a consumable item is recorded on the service order component, the system does not trigger any inventory adjustment transactions. However, the system updates the customer's installed product record to reflect the removal of the installed item.

Note. In the RMA Form, Service Order and Order Materials components, you can select items regardless of the *Serviceable, Returnable,* and *Consumable* check box settings.

Configuration Options

If your implementation includes the PeopleSoft Advanced Configurator product, define the configuration attributes for the item in the Configuration Options group box. The PeopleSoft CRM system supports two configurator products: PeopleSoft Advanced Configurator and PeopleSoft Sales Product Configurator.

Fields in this group box change dynamically depending on which configurator product is installed in the system (the information is available in General Options page under Set Up CRM, Installation Options).

If PeopleSoft Advanced Configurator is installed, the Configured and Configuration Schema fields appear. If PeopleSoft Sales Product Configurator is installed, the Configured, Distribution Model, Configuration Code Generation, and Template fields appear.

Configured

Select if one of the PeopleSoft configurator products can configure the item.

Configuration Schema

Enter a schema to be used for the configuration of the item. This field applies only to PeopleSoft Advanced Configurator.

Distribution Model Enter a model to be used for the configuration of the item. This field applies only to PeopleSoft Sales Product Configurator.

Configuration Code Generation Select to generate configuration codes automatically based on the specified template. This field applies only to PeopleSoft Sales Product Configurator.

You cannot change an item's configuration options to use configuration codes if there is activity in the system for the item (such as inventory balances, customer orders, and so forth).

Template Enter the name of the template that is used to generate configuration codes. This field applies only to PeopleSoft Sales Product Configurator.

See *PeopleSoft Enterprise CRM Advanced Configurator 8.9 PeopleBook.*

Warranty Information

Warranty Name Enter the warranty that is associated with the item. Establish warranties on the Warranty page.

Status Select the current status of the warranty. Values are *Active* and *Inactive.*

Note. An item can have only one active warranty associated with it.

See Also

Chapter 4, “Defining Items,” Understanding Item Definition in PeopleSoft CRM, page 19

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

PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook, “Managing Material Returns”

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, “Ordering and Receiving Materials”

Chapter 9, “Tracking Installed Products,” Understanding Installed Products, page 101

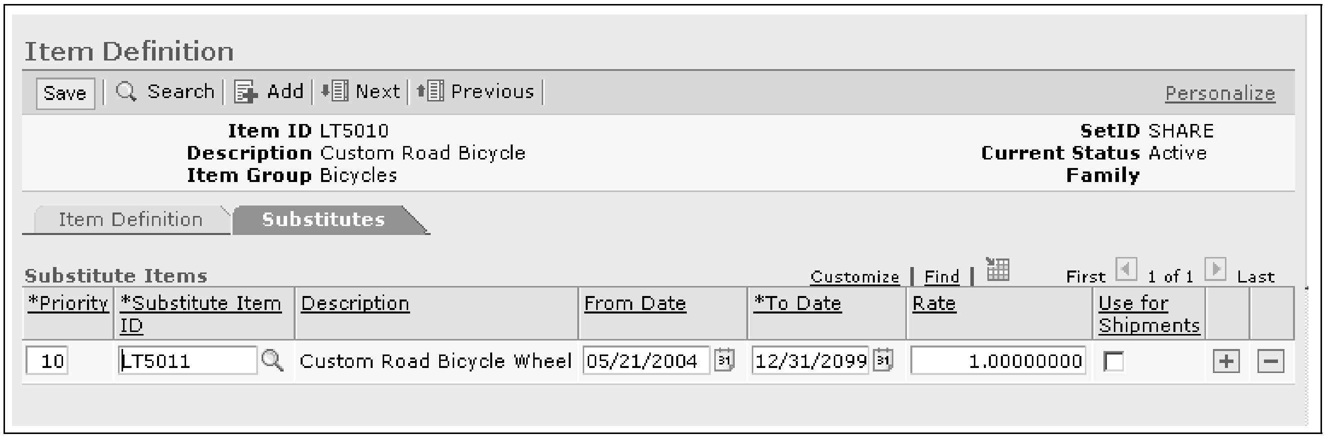
PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, “Setting Up Services”

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

PeopleSoft Inventory 8.8 PeopleBook

Establishing Substitute Definitions

Access the Substitutes page.



Substitutes page

Substitute Items

Priority

Enter a priority value for each substitute item that you add. The substitute item with the highest priority (the lowest number) should be the first choice when substitutions are made. Though priority doesn't need to be sequential, it must be greater than *0.*

From Date

Enter the date on which the substitute item becomes a valid substitution option. The default is the current date.

To Date

Enter the date on which the substitute item is no longer a valid substitution option. The default is December 31, 2099.

Rate

Enter the quantity of the substitute item that is required to replace the original item. The default conversion rate is *1*. Conversion rates are calculated using the item's standard UOM.

Use for Shipments

Select if the substitute item is valid for material stock requests during the picking process in your inventory system.

See Also

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, "Ordering and Receiving Materials"

PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook, "Managing Material Returns"

Associating Items with Additional UOMs

To associate items with additional UOMs, use the Unit of Measure (INV_ITEM_UOM) component.

You can define additional UOMs for item transactions. For example, suppose that you order an item by the case but ship it in individual units, you need two additional UOMs: a shipping UOM (each), and an ordering UOM (case). When multiple UOMs apply to a given item, PeopleSoft maintains conversion rates to facilitate processing.

This section discusses how to add UOMs.

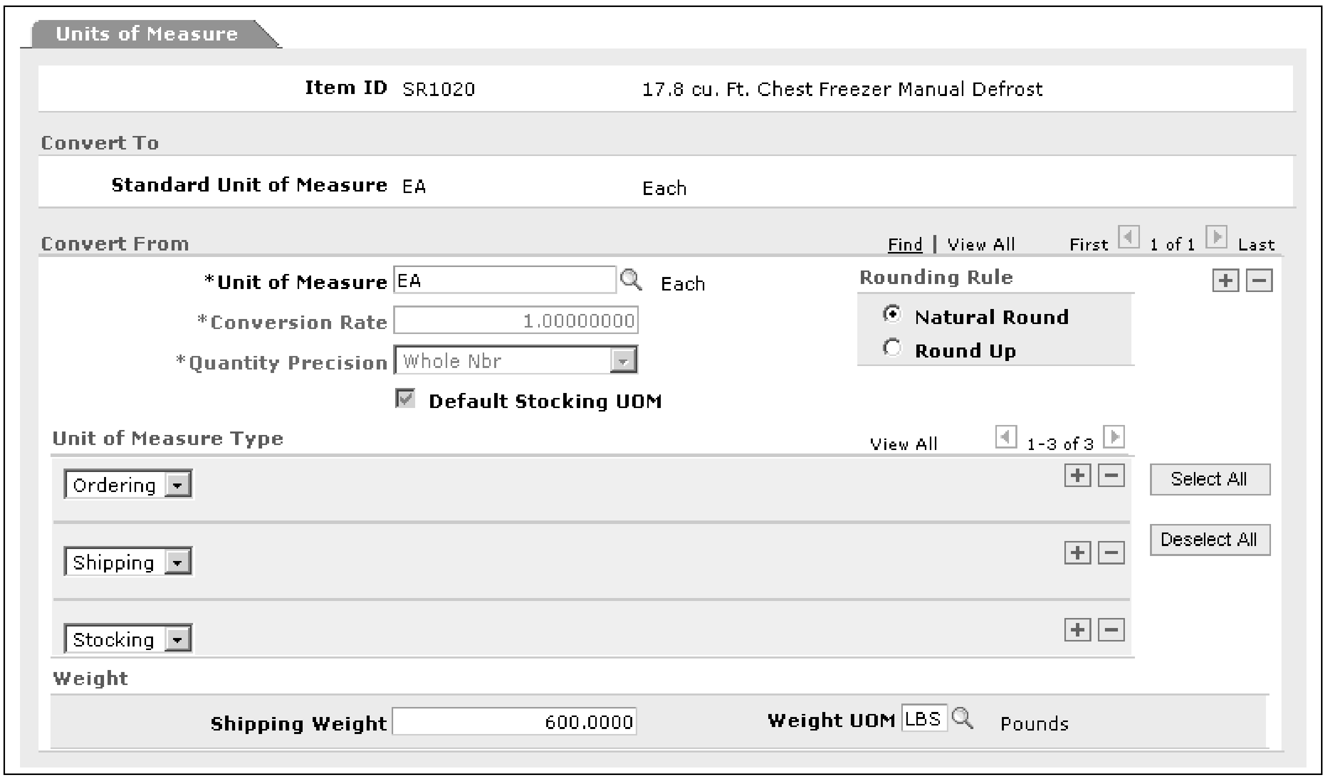
Note. When you define an item in the Item Definition component in PeopleSoft CRM, the system automatically inserts a row into the Units of Measure table with the standard UOM set up as a valid ordering, stocking, and shipping UOM.

Page Used to Associate Items with Additional UOMs

Page Name	Object Name	Navigation	Usage
Units of Measure	INV_ITEM_UOM	Items CRM, Units of Measure, Units of Measure	Add UOMs to an item.

Adding UOMs

Access the Units of Measure page.



Units of Measure page

In PeopleSoft Order Capture, the system prompts for product UOMs that are defined as valid ordering UOMs. In PeopleSoft Integrated FieldService and Support all item transactions are performed using the item's standard UOM.

Convert To

This group box displays the standard UOM that you define for this item on the Item Definition page.

Convert From

Unit of Measure Enter a UOM that is also used for transactions involving this item. You establish UOMs under Set Up CRM, Common Definitions, Units of Measure, Units of Measure.

Note. In PeopleSoft Integrated FieldService, the system uses the item's standard UOM for all item transactions initiated from the Order Materials and Service Order component. Similarly, in PeopleSoft Support, the system uses the item's standard UOM only for return material authorization (RMA) and replacement transactions initiated from the RMA Form component.

Conversion Rate

Enter the conversion rate between the standard UOM (in the Convert To group box) and the UOM (in the Convert From group box). If you have specified the conversion rate between these two UOMs under Set Up CRM, Common Definition, Units of Measures, the CRM system populates the value automatically when you specify the UOM (in the Convert From group box).

To determine the conversion rate to enter, consider the relationship between the standard UOM and this new UOM. For example, suppose that the standard UOM for the item is EA (each) and this newly added UOM is CS (case), and one CS of the item contains 5 EA items, enter *5* as the conversion rate. The value's format gets updated after you save the record.

Quantity Precision

Select how calculated or user-entered quantities should be presented in the system, as decimal (up to four decimal places) or whole number.

This field applies to PeopleSoft SCM.

Default Stocking UOM

Select if this unit of measure is the default stocking UOM. This field applies only to PeopleSoft SCM.

When you assign UOMs to an item on the Units of Measure page, you indicate whether each UOM is valid for ordering, shipping, or stocking transactions. If more than one UOM is valid for stocking, specify which of these should be the default stocking UOM.

Rounding Rule

These fields apply only to PeopleSoft SCM.

Unit of Measure Type

Select the kinds of transactions that use the selected UOM. You must select at least one UOM type for each item.

Ordering

Select if the UOM is used for stock requests or for express issue transactions in PeopleSoft Inventory. Order Management also uses the ordering UOM. In Order Capture, the system prompts for product UOMs that are defined as valid ordering UOMs.

Shipping

Select if the UOM is used for shipping and issues transactions in PeopleSoft Inventory.

Stocking

Select if the UOM is used for putaway or receiving transactions in PeopleSoft Inventory. You can also use this UOM for numerous other transactions in PeopleSoft Inventory, including transfers, container management, adjustments, picking, and physical accounting.

Select All and **Deselect All**

When you first define an item-UOM combination, only one field appears in the Unit of Measure Type group box. If the selected UOM is valid for all transactions involving this item, click the Select All button.

If the selected UOM is no longer valid for a given transaction, click the Deselect All button to clear the UOM type fields, then insert valid transactions.

To associate the item with additional units of measure, add rows using the Add a new row button to the right of the Unit of Measure Type group box.

Weight

PeopleSoft Order Capture uses the Shipping Weight and Weight UOM fields to calculate shipping costs when it is integrated with a third-party freight calculator software (for example, ConnectShip).

See Also

Chapter 7, “Setting Up Products,” page 51

Chapter 4, “Defining Items,” Associating Items with Additional UOMs, page 31

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, “Ordering and Receiving Materials”

PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook, “Managing Material Returns”

PeopleSoft Financials, Enterprise Service Automation, and Supply Chain Management 8.8 PeopleBook

PeopleSoft Managing Items 8.8 PeopleBook

CHAPTER 5

Working with Item Assemblies

This chapter provides an overview of item assemblies and discusses how to:

- Define item assemblies.
- View assembly information.

Understanding Item Assemblies

Item service assemblies identify the components of an item that an organization can service or support. Once defined, technicians or call center agents can use the Review Assemblies component to reference the service assembly definition and help drive troubleshooting and service activities.

For every item within a setID in the system, you can define serviceable component items. You can also define service assemblies for a component item, creating service assemblies with multiple levels. Before you can define a service assembly, however, you must define the item and all of its component items.

For each assembly within a setID, you can define multiple versions using assembly codes. For example, suppose that you have a radio that is sold and serviced in the U.S. and Great Britain. You can define two assembly codes to reflect the radio's different power supply components.

In addition to identifying serviceable components for an item, technicians and call center agents can use service assemblies to check for manufacturers' warranties on the component parts of an item that is installed at the customer's site. In PeopleSoft Customer Relationship Management (PeopleSoft CRM), you can activate warranties that you offer for installed products; however, this warranty information is for the end item itself on the installed product record, not for any component items. You can check for warranties that you offer for the component item on the Review Assemblies - Components page.

See Also

Chapter 4, "Defining Items," page 19

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

Defining Item Assemblies

To define assembly items, use the Assemblies Maintenance (BOM_MAINTENANCE) component.

This section lists common elements and discusses how to:

- Specify assembly components.

- Describe the service assembly and record notes.
- Define component details.
- Add notes to the assembly definition.

Common Elements Used in This Section

Op Seq (operation sequence)
Enter the sequence in which the component is assembled. This value is informational in PeopleSoft CRM. Operation sequence is used primarily in PeopleSoft Manufacturing environments.

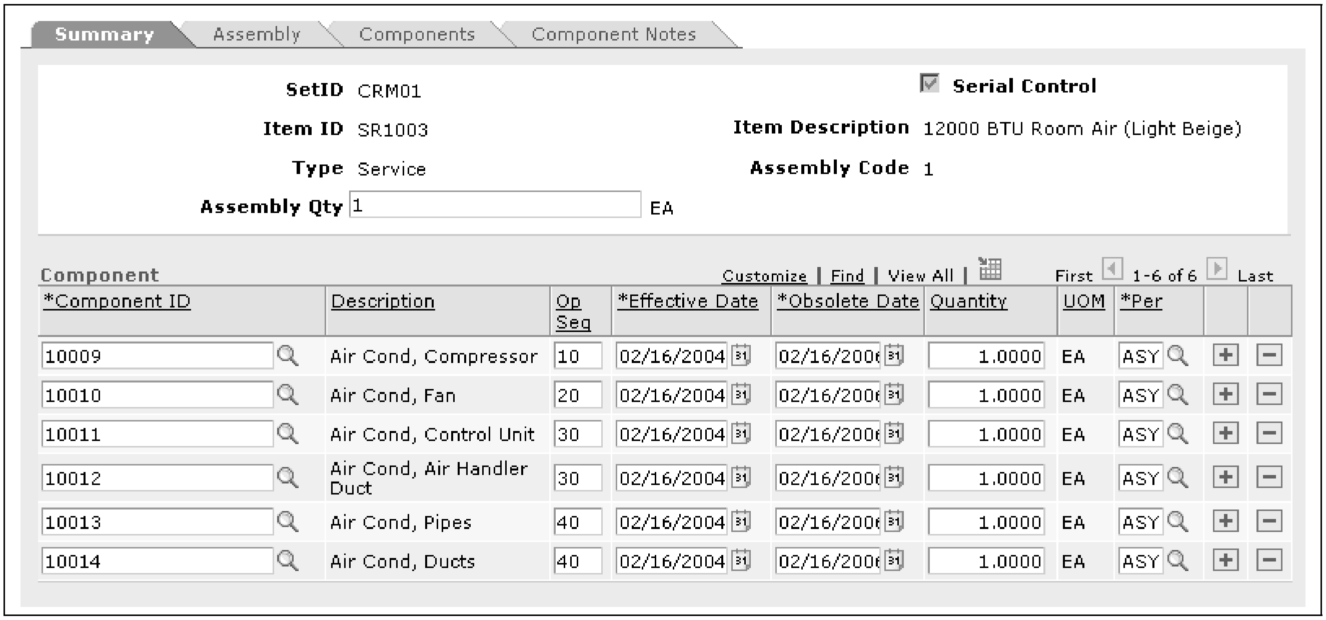
Quantity and **Per**
Enter the quantity of the component that is required per assembly or order of the end item, in the item's standard unit of measure (UOM) that you define for the component item. The quantity is used primarily in PeopleSoft Manufacturing environments.

Pages Used to Define Item Assemblies

Page Name	Object Name	Navigation	Usage
Assemblies - Summary	EN_BOM_MAINT	Items CRM, Assemblies, Summary	Define and maintain the serviceable components for a given combination of setID and item.
Assemblies - Assembly	EN_BOM_TEXT	Items CRM, Assemblies, Assembly	Describe the service assembly and record any applicable notes.
Assemblies - Components	EN_COMP_MAINT	Items CRM, Assemblies, Components	View or modify details about each assembly component.
Assemblies - Component Notes	EN_COMP_TEXT	Items CRM, Assemblies, Component Notes	View or record notes that relate to a specific component on a service assembly.

Specifying Assembly Components

Access the Assemblies - Summary page.



Assemblies - Summary page

Assembly Qty (assembly quantity)

Enter the end item quantity in the item's standard UOM as you define on the Item Definition page. In general, set the assembly quantity to *1* and enter the component quantity that is included in one unit of the end item. However, if you typically install and service the end item in quantities greater than one, you might define a service assembly in terms of the normal installation and service quantity.

For example, a manufacturer and distributor of speakers might produce and stock speakers in inventory as single units. Yet because a customer always buys at least two speakers at a time, the speaker company might choose to set up a service assembly with an assembly quantity of two.

Component ID

Select a service assembly component. You must establish the component as an active item using the Item Definition page or the Item Master enterprise integration point. In addition, the component item must conform to these restrictions:

- The component item cannot be the same as the end item.
- The effectivity period, which the effective and obsolete dates specify for the component, cannot overlap with other rows for the same component ID.

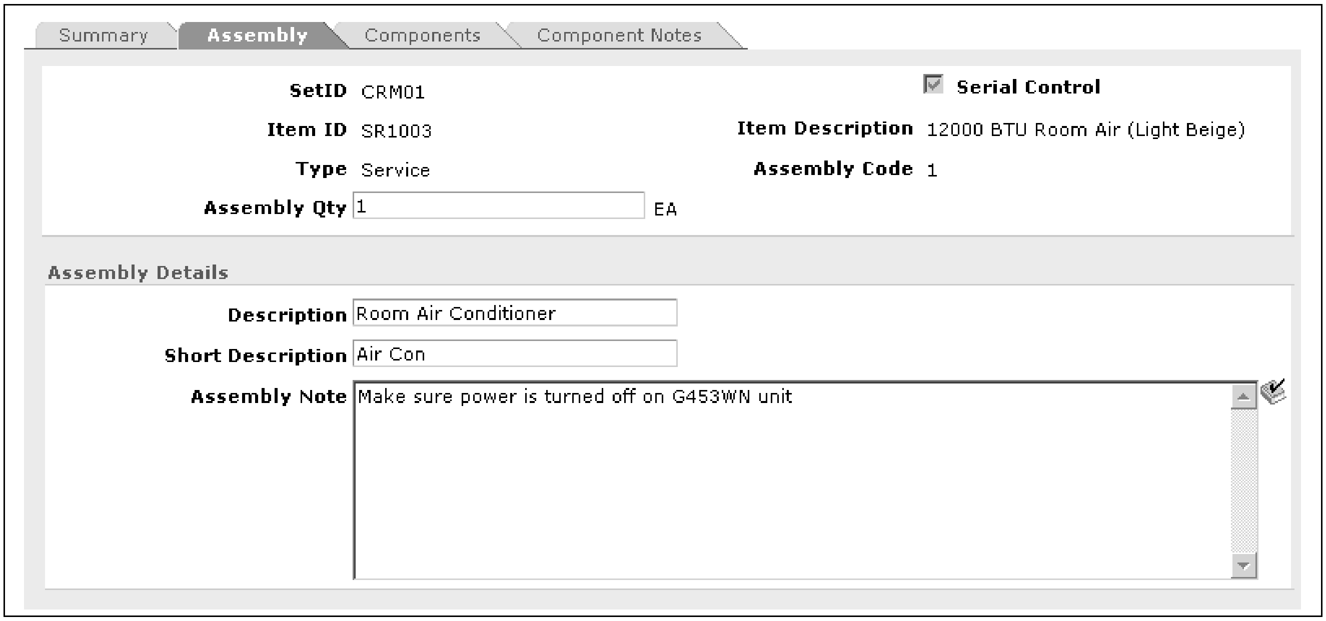
See Also

Chapter 4, "Defining Items," page 19

PeopleSoft Bills and Routings 8.8 PeopleBook

Describing the Service Assembly and Recording Notes

Access the Assemblies - Assembly page

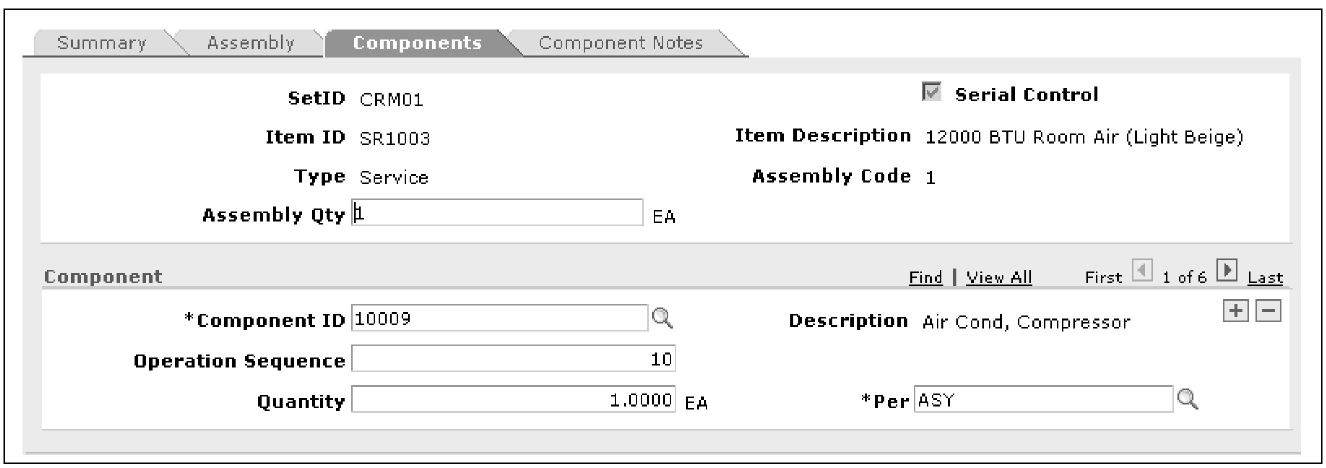


Assemblies - Assembly page

Use the Assembly Details section of this page to describe any appropriate details of the assembly and any notes that may apply.

Defining Component Details

Access the Assemblies - Components page.



Assemblies - Components page

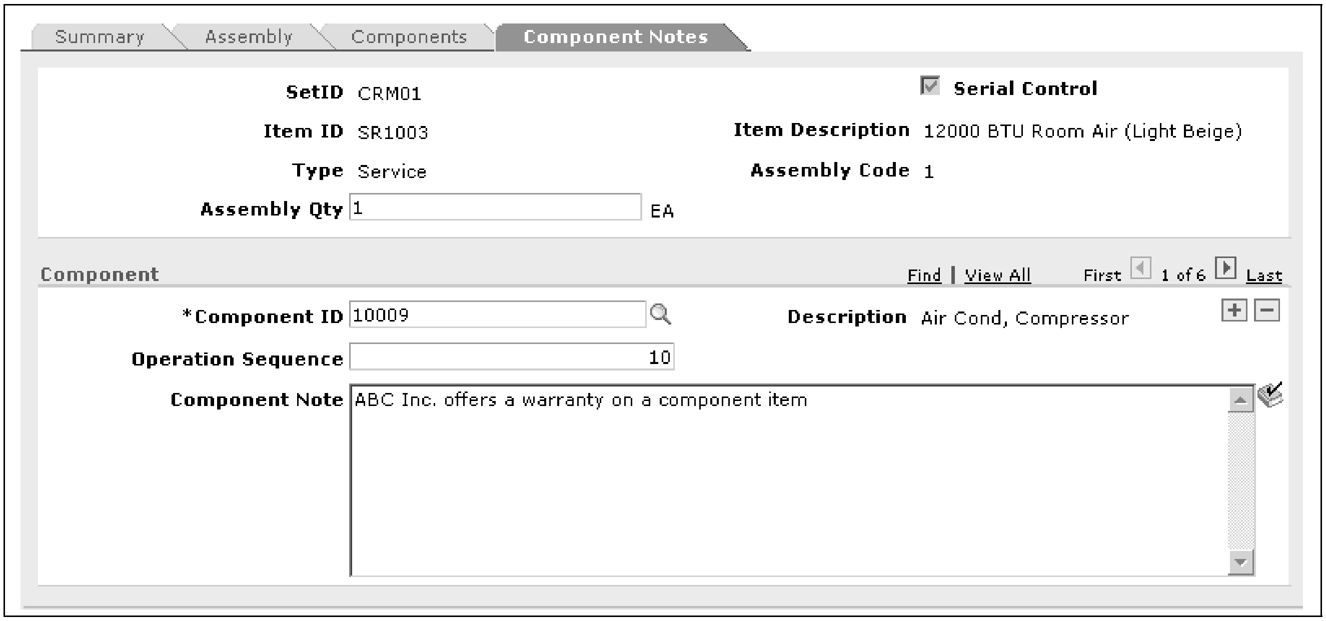
Component ID Select a service assembly component. The system automatically populates the description of the component item.

See Also

PeopleSoft Bills and Routings 8.8 PeopleBook

Adding Notes to Assembly Definition

Access the Assemblies - Component Notes page.



Assemblies - Component Notes page

If a manufacturer or another third party offers a warranty on a component item, you can note it on this page.

Viewing Assembly Information

To view assembly information, use the Assemblies Inquiry (BOMINQUIRY) component.

This section lists common elements and discusses how to:

- Search for item assemblies.
- View component detail and warranty information.

Common Elements Used in This Section

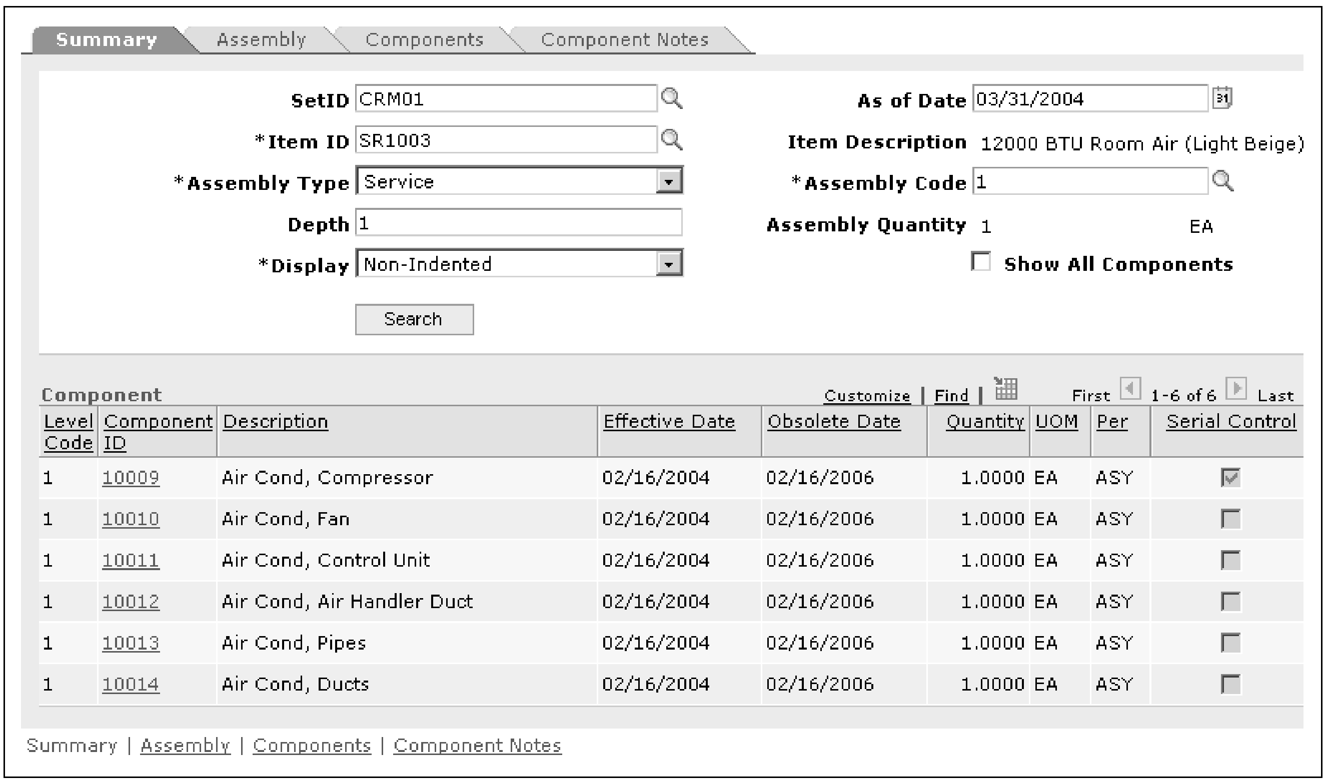
Quantity and **Per** — Displays the quantity of the component that is required per assembly or order of the end item, in the item's standard UOM that you define for the component item.

Pages Used to View Assembly Information

Page Name	Object Name	Navigation	Usage
Review Assemblies - Summary	EN_BOM_INQUIRY	Items CRM, Review Assemblies, Summary	View the serviceable components that are defined for a given combination of setID and item.
Review Assemblies - Assembly	EN_BOM_INQ_HEADER	Items CRM, Review Assemblies, Assembly	View a description of the service assembly and any recorded notes.
Review Assemblies - Components	EN_BOM_INQUIRY_D	Items CRM, Review Assemblies, Components	View details about each component in the assembly.
Review Assemblies - Component Notes	EN_BOM_INQ_D_TXT	Items CRM, Review Assemblies, Component Notes	View notes that are related to a specific component on a service assembly.

Searching for Item Assemblies

Access the Review Assemblies - Summary page.



Review Assemblies - Summary page

Enter search criteria for the service assembly that you want to view.

SetID Enter the setID of the service assembly. The system populates this value with the default setID that is associated with your user ID on the User Preferences - Overall Preferences page, if applicable.

As of Date Enter the effective date of the service assembly. If you choose not to show all components, the system displays only the components that are defined for the service assembly that is in effect for this date.

Item ID Enter the end item for which a service assembly has been defined.

Assembly Type Select *Service*. Although other assembly types are available, only service is applicable for PeopleSoft CRM applications.

Assembly Code Enter the version of the service assembly that is defined for the setID and item combination. Assembly codes can range from 1 to 99.

Depth Enter the component level of the service assembly. To view all levels, enter *99*.

Display Select the formatting method to display the service assemblies. Values are:

Indented: Select to display the service assembly components with each level indented relative to the previous level. If you select a depth greater than 1, the system automatically sets this value.

Non-Indented: Select to display the service assembly components as a simple list without indentation.

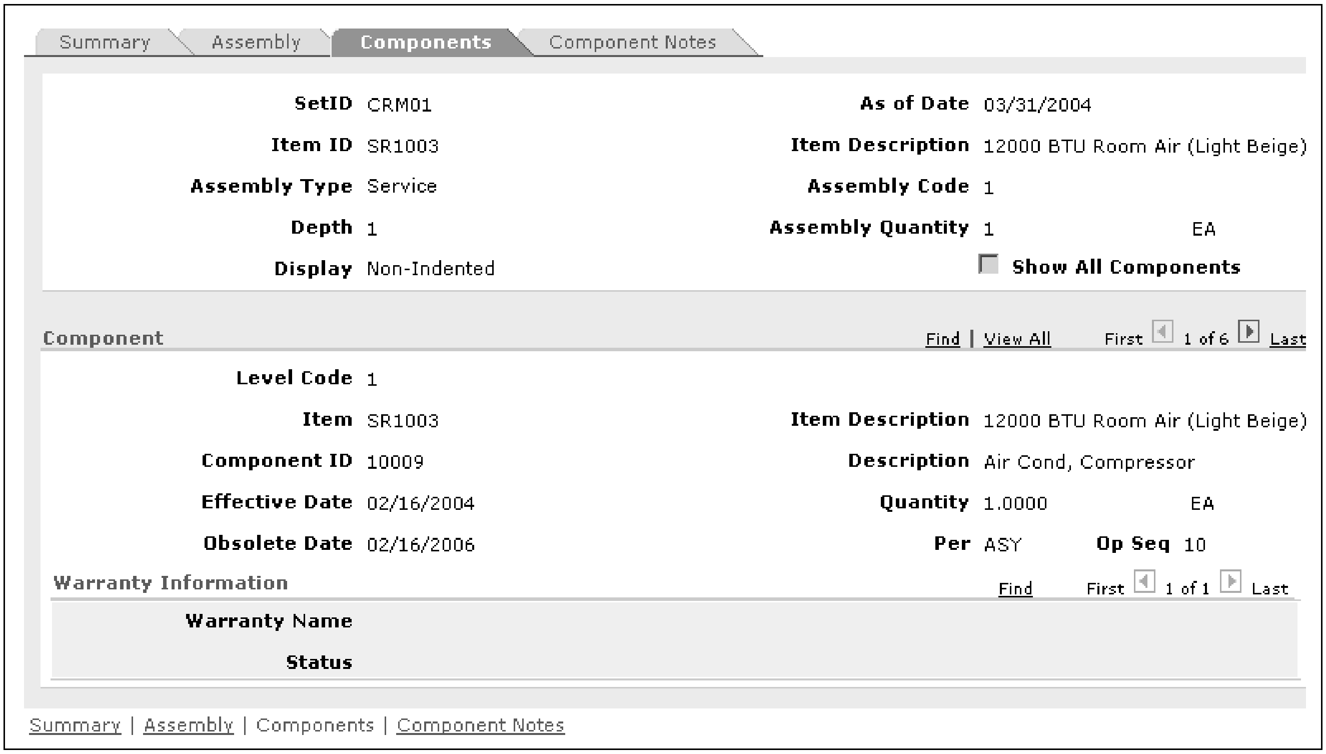
Show All Components Select to view all components that are defined for a service assembly regardless of the effective date.

Level Code Displays the level of the component on the service assembly.

Component ID Displays the item ID of each component. Click the item ID to access the Review Assemblies - Components page and view details, including warranty information, about the component item.

Viewing Component Detail and Warranty Information

Access the Review Assemblies - Components page.



Review Assemblies - Components page

Component

Level Code Displays the level in the service assembly at which the component item is defined.

Item Displays the item ID and description.

Op Seq (operation sequence) Displays the sequence in which the component appears in the assembly structure.

Warranty Information

This section displays the warranty that you establish for the component item on the Item Definition page, if applicable.

See Also

Chapter 4, “Defining Items,” page 19

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

CHAPTER 6

Checking Item Balances and Availability

This chapter provides an overview of balance inquiries and discusses how to view balance information.

Understanding Balance Inquiries

This section discusses:

- Item availability inquiries.
- Item balance inquiries by business units.
- Item balance inquiries by group members.

Item Availability Inquiries

If you integrate PeopleSoft Customer Relationship Management (PeopleSoft CRM) with PeopleSoft Inventory and you are accessing system pages through the portal using the single sign-on feature, links to the Item/Product Availability component in Inventory are available from the Order Materials and Service Order components in PeopleSoft Integrated FieldService and the Return Material Authorization component in PeopleSoft Support. With the Item/Product Availability component, you can confirm the current available quantity for an item, check cumulative available-to-promise quantity for future dates, and view future supply and demand information for the item.

To inquire item availability from the Return Material Authorization component for an advanced exchange return material authorization:

1. Click the View Related Links button in the Replacement Item(s) grid on the Return Material Authorization page.
2. Click the Item Availability link on the transfer page.

To inquire about item availability within Integrated FieldService, click the Check Availability link adjacent to the item ID on the Order Materials page and then click the Item Availability link on the transfer page.

You can also check availability from the Required Material page within a service order in PeopleSoft Integrated FieldService. Click the Check Availability link next to the item ID then click the Item Availability link on the transfer page.

See Also

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, “Ordering and Receiving Materials”

PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook, “Managing Material Returns”

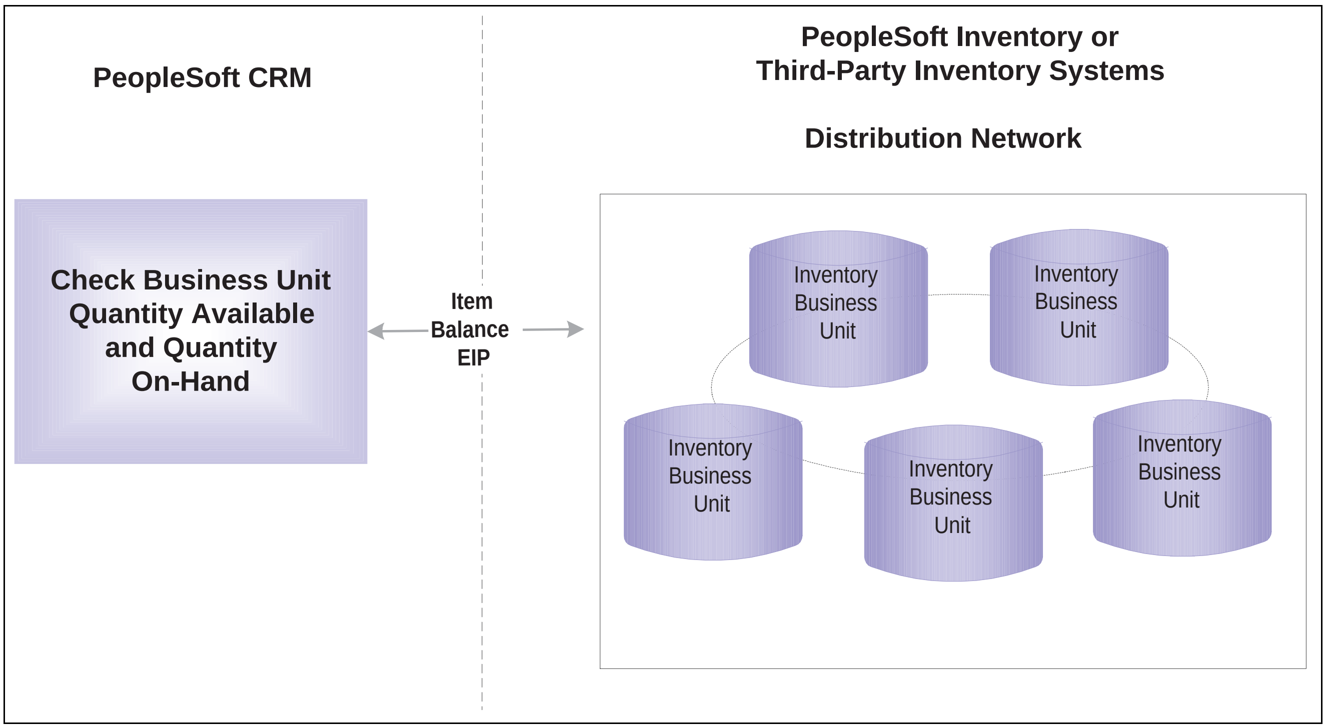
PeopleSoft Inventory 8.8 PeopleBook

Item Balance Inquiries by Business Units

PeopleSoft CRM uses the Item Balance enterprise integration point (EIP) to retrieve quantity available and on-hand balance information in real-time from the inventory business units that are included in the distribution network that is defined for customer support or field service operations. The sequence of business units reflects their order in the distribution network.

Note. When integrating with PeopleSoft Purchasing and Inventory, you define a distribution network of inventory business units for each business unit in PeopleSoft CRM that can request material for service orders or as replacements or exchanges for material returns.

This diagram illustrates the integration between PeopleSoft CRM and your inventory and procurement system that supports checking quantity that is available and on hand in the inventory distribution network:



Data flow from inventory systems to PeopleSoft CRM

See Also

PeopleSoft Financials, Enterprise Service Automation, and Supply Chain Management Applications Fundamentals 8.8 PeopleBook

PeopleSoft Enterprise Components PeopleBook

Item Balance Inquiries by Group Members

In PeopleSoft Integrated FieldService, you can check item balances for the good truck stock storage locations that are associated with each group member in a provider group. You can use this balance information to select a group member to assign to a service order activity and to decide how much, if any, material must be ordered to complete the work on the service order activity.

PeopleSoft CRM uses the Item Balance EIP to retrieve balance information in real-time for the good truck stock storage locations that are associated with each member of the assigned provider group from PeopleSoft Inventory or a third-party inventory system. The balance information appears on the Item Balance by Group Member page in PeopleSoft CRM.

The system retrieves balance information only for group members who are associated with storage locations on the Storage Location page of the Worker component. This sequence of rules govern which group members' storage location balances the system retrieves:

1. If one or more group members are assigned to the service order activity, the system retrieves balance information for the group members that are assigned to the line.
2. If no group member is assigned to the service order activity, but a provider group is specified, the system retrieves the balance information for all group members that are associated with the provider group on that activity.
3. If no group member or provider group is assigned at the activity level, the system displays an error message.

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 Enterprise Components PeopleBook

Viewing Balance Information

To view balance information, use the Part Activities (RF_MANAGE_MATERIAL) component.

This section lists common elements and discusses how to:

- Check item balances by inventory business units.
- Check item balances by group members.
- View error messages.

Common Elements Used in This Section

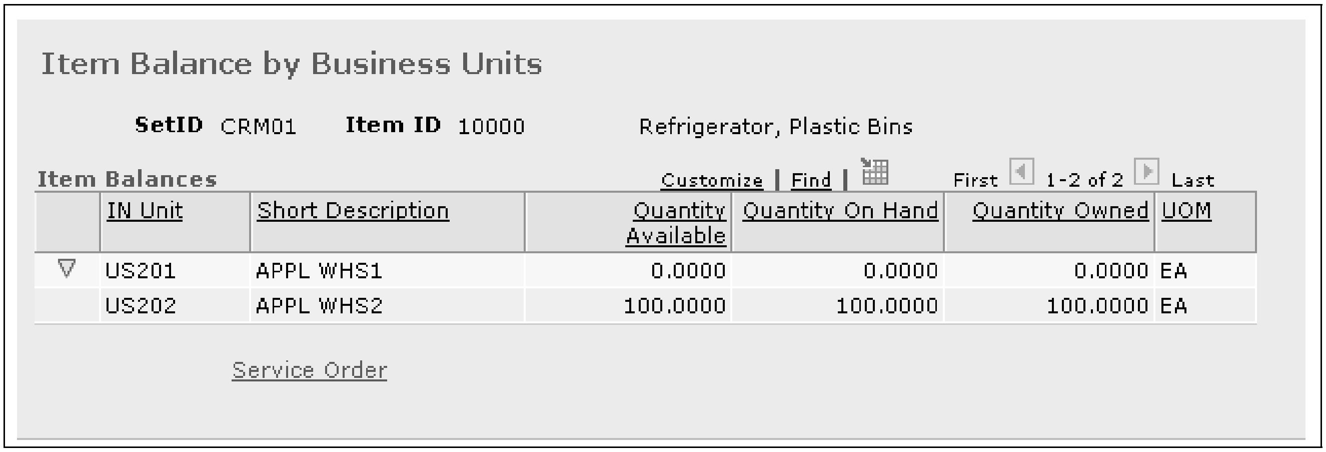
The Message Log button indicates that the system recorded in the Message Log an error that the Item Balance EIP encountered. Click the button to view the message on an Item Balance Message page.

Pages Used to View Balance Information

Page Name	Object Name	Navigation	Usage
Item Balance by Business Units	RF_STOR_LOC_RST	• From the Return Material Authorization page in PeopleSoft Support (select Support, Returns), click the View Related Links button under the Replacement Item ID field and then click the Item Balance link on the transfer page. • From the Required Material page within the service order in PeopleSoft Integrated FieldService, click the Check Availability link next to the Quantity in Truck field and then click the Item Balance by Business Units link on the transfer page. • From the Order Materials page click the Check Availability link next to the Quantity in Truck field and then click the Item Balance by Business Units link on the transfer page	Check item balances for the inventory business units that are included in the distribution network that you define for customer support or field service operations.
Item Balance by Group Members	RF_STOR_LOC_RST	• From the Required Material page within the service order in PeopleSoft Integrated FieldService, click the Check Availability link next to the Quantity in Truck field and then click the Item Balance by Group Members link on the transfer page. • From the Order Materials page click the Check Availability link next to the Quantity in Truck field and then click the Item Balance by Group Members link on the transfer page	Check item balances for group members of the assigned provider group.
Return Message from Inventory	RF_ITM_BAL_MSG1, RF_ITM_BAL_MSG2, RF_ITM_BAL_MSG3	Click the Message Log button on the Item Balance by Business Units page or the Item Balance by Group Members page.	View messages about problems that the PeopleSoft CRM system encountered when it attempted to retrieve item balance information from the inventory system with the Item Balance EIP.

Checking Item Balances by Inventory Business Units

Access the Item Balance by Business Units page.



Item Balance by Business Units page

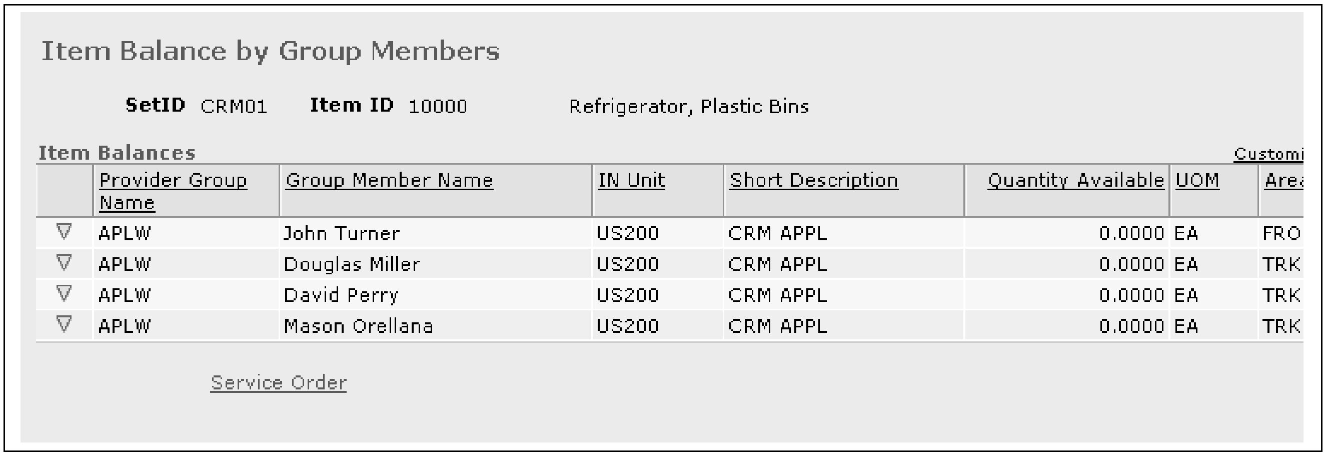
Note. This page is available only if you have implemented the Item Balance EIP to retrieve quantity balance information from PeopleSoft Inventory or a third-party inventory system.

	Click the Message Log button to access the Return Message from Inventory page.
IN Unit (inventory business unit)	Displays the inventory business unit in the distribution network that is associated with support or field service activities. The sequence of the business units reflects their order in the distribution network.
Quantity Available	Displays, in the item's standard unit of measure (UOM), the amount of the item that is available to fulfill orders in the inventory business unit.
Quantity On Hand	Displays, in the item's standard UOM, the amount of the item that is currently stored in the inventory business unit.
Quantity Owned	Displays, in the item's standard UOM, the amount of the item that the inventory business unit owns.

Depending on from where you navigated, these links can appear at the bottom of the page: Return to RMA, Service Order, and Order Materials. Click a link to return to the corresponding component.

Checking Item Balances by Group Members

Access the Item Balance by Group Members page.



Item Balance by Group Members

SetID CRM01 Item ID 10000 Refrigerator, Plastic Bins

Item Balances

	Provider Group Name	Group Member Name	IN Unit	Short Description	Quantity Available	UOM	Area
▽	APLW	John Turner	US200	CRM APPL	0.0000	EA	FRO
▽	APLW	Douglas Miller	US200	CRM APPL	0.0000	EA	TRK
▽	APLW	David Perry	US200	CRM APPL	0.0000	EA	TRK
▽	APLW	Mason Orellana	US200	CRM APPL	0.0000	EA	TRK

Service Order

Item Balance by Group Members page

Note. This page is available only if you have implemented the Item Balance EIP to retrieve quantity balance information from PeopleSoft Inventory or a third-party inventory system.

Click the Message Log button to access the Return Message from Inventory page.

Provider Group Name Displays the name of the provider group that is assigned to the service order activity.

Group Member Name Displays the name of the group member that is assigned to the service order activity.

IN Unit (inventory business unit) Identifies the inventory business unit where the group member's truck stock storage locations are defined.

Quantity Available Displays the amount of the item that is available to fulfill orders in the group member's good truck stock storage location.

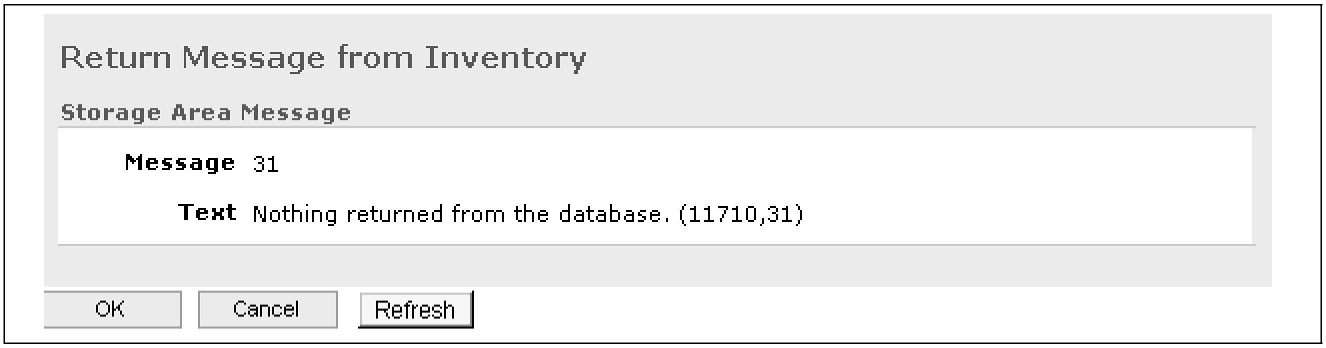
Area, Level 1, Level 2, Level 3, and **Level 4** Displays the material storage area in PeopleSoft Inventory or the third-party inventory system that corresponds to the worker's good storage location. You can define a storage location definition in an inventory system using a storage area and up to four levels representing a physical subdivision of the storage area, such as aisles, rows, shelves, and bins.

See Also

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, "Understanding Inventory Storage Locations for Technicians"

Viewing Error Messages

Access the Return Message from Inventory page.



Return Message from Inventory page

Note. This page is available only if there are problems retrieving balance information with the Item Balance EIP.

The Message Node (for Item Balance by Business Units) or Storage Area Message (for Item Balance by Group Members) group box displays information regarding errors with the Item Balance EIP process.

The return message is the message catalog number.

Typically, business unit errors indicate that the business unit has not been defined or the business unit-item combination is invalid in the inventory system. Storage area errors typically indicate that the storage location for the technician’s truck stock has not been defined or the storage location-item combination is invalid in the inventory system.

CHAPTER 7

Setting Up Products

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

- Define products.
- Assign product units of measurement (UOMs).
- Define product package components.
- Establish product prices.
- Manage product relationships.
- Enter product notes.

Understanding Products in PeopleSoft CRM

This section discusses:

- Product definitions in PeopleSoft CRM.
- Integrations with PeopleSoft Supply Chain Management (PeopleSoft SCM) and PeopleSoft Proposal Management.

Product Definitions in PeopleSoft CRM

PeopleSoft CRM uses a product definition to represent each product. The product definition—which is keyed by product ID—stores all of the product information that company representatives require to sell or support the product. PeopleSoft CRM also uses product definitions for:

- Pricing product orders.
- Generating product catalogs.
- Storing product advisor scripts for use by sales and support personnel.

Product Definition Types

There are five types of product definitions in PeopleSoft CRM:

- Standard product.
- Package product.
- Service agreement.
- Service product.

- Engagement service.

See Chapter 2, “Understanding Products and Items in PeopleSoft CRM,” page 7.

Product Definition Process

Follow these steps to define products in PeopleSoft CRM:

1. Analyze how the various parts of the CRM system use product definitions.

   For example, the catalog generation process and the ordering process can both use product definitions.

2. Create definitional elements to associate with products.

   Definitional elements are attributes such as product brands, product categories, and competency codes. You associate definitional elements with product IDs to create unique product and product package definitions.

   See Chapter 3, “Setting Up Product Definitional Elements,” page 11.

3. Select a product type and create a product definition.

   After you define a product, the product ID becomes available on product search lists so that you can access the product definition from other CRM pages.

   Important! In PeopleSoft CRM, you can define a product when you define an item, or you can create a product and associate it with existing items. Typically, you begin by defining an item and having the system copy the item’s product ID, description, and standard UOM to the product definition table.

   See Chapter 4, “Defining Items,” page 19.

4. Associate definitional elements and other product attributes with the product ID.
5. Select package components (if the product definition is for a product package).
6. Assign product UOMs.
7. Establish product prices.
8. Define relationships between products.
9. Associate notes with products.

Integrations with PeopleSoft SCM and PeopleSoft Proposal Management

Product information is integrated with PeopleSoft SCM (and third-party SCM systems) and PeopleSoft Proposal Management, which is part of the PeopleSoft Enterprise Services Automation product suite, by using enterprise integration points (EIPs). These are the considerations for using EIPs:

SCM Integrations

SCM systems use product definitions to manage products and product components throughout the manufacturing process. PeopleSoft CRM delivers several EIPs that maintain data integrity between PeopleSoft CRM and SCM systems—including PeopleSoft SCM and third-party systems—by synchronizing product data.

You integrate product data by using the PeopleTools Integration Broker. This technology enables both synchronous and asynchronous messages to be transmitted using one technology.

These EIPs are used for both publishing and subscribing:

- PRODUCT_SYNC

- PRODUCT_FULLSYNC
- PRODUCT_SYNC_EFF

Note. If the PRODUCT_SYNC message is active, an add, change, or delete action in the Product Definition components automatically executes the product sync publish logic.

PeopleSoft CRM publishes the PRODUCT_SYNC message whenever product data is added, changed, or deleted using the Product Definition - Definition page, the Package Components page, the Product Price page, the Package Component Pricing page, the Notes page, the Relationships component (PROD_RELATIONS_CMP), and the Product Unit of Measure page. PeopleTools 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 permit packages within packages, package components that are themselves packages are also stripped from the message.

PeopleSoft CRM subscribes asynchronously to the PRODUCT_SYNC message that comes from the SCM system. This data is processed directly into the PeopleSoft CRM product tables using component interfaces. A product package header record is added for any kit components that are received from SCM. When a PRODUCT_SYNC or PRODUCT FULL_SYNC message is received, the system runs the subscription logic, which calls one of these component interfaces depending on the content of the message:

- PRODKIT_CI
- PRODKIT_COMPS_PRC_CI
- PROD_DEFN_CI
- PROD_NOTE_CI
- PROD_PRICE_CI
- PROD_RELATIONS_CI
- PROD_UOM_CI

This table shows how an order represents packages to the PeopleSoft SCM system:

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.
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.

Type	Line Display	Line Data Model/EIP
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.

Proposal Management Integrations

PeopleSoft CRM can send information to PeopleSoft Proposal Management. This occurs when a quote that originates from a PeopleSoft Sales lead or opportunity or is entered using PeopleSoft Order Capture includes an engagement service product. PeopleSoft Proposal Management prices the engagement and sends pricing information back to PeopleSoft CRM.

This integration consists of these application messages:

- OC_ESA_PROPOSAL

  This message is sent to PeopleSoft Proposal Management when a quote is submitted for an engagement-type service in PeopleSoft Order Capture.

- OC_ESA_PROPOSAL_RESPONSE

  This message returns the capture ID, proposal ID, and version ID from PeopleSoft Proposal Management to PeopleSoft Order Capture.

- ESA_PROPOSAL_PRICE

  When PeopleSoft Proposal Management completes pricing the engagement, pricing information is sent back to PeopleSoft Order Capture.

- OC_ESA_PROPOSAL_STATUS

  This sends the status of a proposal (for example, draft or negotiated) to PeopleSoft Proposal Management.

Important! Before you can integrate with PeopleSoft Proposal Management, you must first define the *Engagement Services* product.

See *PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook*.

Defining Products

To define products, use the Product Definition (PROD_DEFN) component.

This section discusses how to:

- Define product information.
- Define external product descriptions.

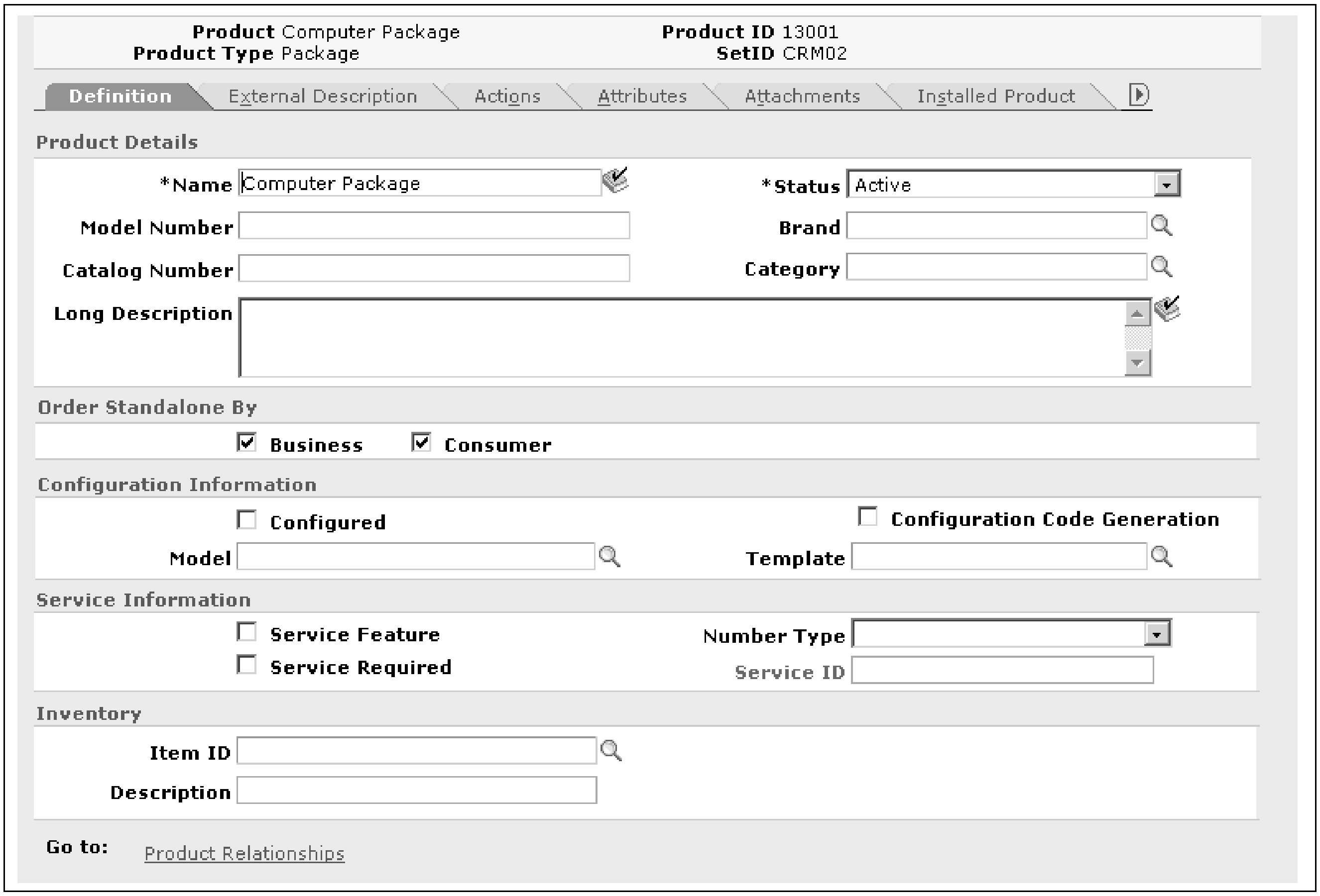
- Define actions for a product.
- Define product attributes.
- Attach files to product definitions.
- Define installed product rules.
- Attach images to product definitions.
- Associate branch scripts with products.
- Add products to product groups.
- Define product availability for regions.
- Track competing products.

Pages Used to Define Products

Page Name	Object Name	Navigation	Usage
Product Definition - Definition	PROD_DEFN	Products CRM, Product Definition, Definition	Define product information.
Product Definition - External Description	PROD_EXT_DESCR	Products CRM, Product Definition, External Description	Define a product's external description.
Product Definition - Actions	RBT_PROD_ACTION	Products CRM, Product Definition, Actions	Define actions that occur during the life cycle of a product.
Product Definition - Attributes	RB_ATTR_RUN_PROD	Products CRM, Product Definition, Attributes	Define product attributes such as dimensions, materials used in manufacturing, and color.
Product Definition - Attachments	PROD_ATT	Products CRM, Product Definition, Attachments	Attach files to a product.
Product Definition - Installed Product	PROD_INSTALL	Products CRM, Product Definition, Installed Product	Define rule sets for processing installed products.
Product Definition - Product Groups	PROD_GROUP_LNK	Products CRM, Product Definition, Product Groups	Add products to product groups.
Product Definition - Images	PROD_IMAGES	Products CRM, Product Definition, Images	Attach images of different sizes to a product.
Product Definition - Branch Scripts	PROD_BSCRIPT	Products CRM, Product Definition, Branch Scripts	Associate a branch script with a product.
Product Definition - Regions	PROD_REGION	Products CRM, Product Definition, Regions	Define sales regions for products.
Product Definition - Competitors	PROD_COMPTTRS	Products CRM, Product Definition, Competitors	Track competitors' products.

Defining Product Information

Access the Product Definition - Definition page.



Product Definition - Definition page

Note. Slightly different views of this page appear depending on the product type that you select when you add the product definition. The display template that you associate with the product type controls how the page appears.

See Chapter 7, "Setting Up Products," Product Definitions in PeopleSoft CRM, page 51 and *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, "Configuring Display Templates".

Product Details

This is information that identifies the product, and appears for all product types. The specific fields that appear vary depending on the requirements of the product type. For example, engagement services do not have a catalog number, model number, brand, or category.

Model Number and **Catalog Number**	Enter the product catalog number and model number if a product appears in another vendor catalog.

Order Standalone By

This group box appears for all product types.

Business	Select if the product is available as a standalone product (not part of a package) to businesses.

Consumer Select if the product is available as a standalone product to consumers.

Note. If you do not select either of these options, the system treats the product as one that is available only as a package component.

Pricing

For packages, indicate the pricing method. This information appears for standard products and for package products.

at Top Level Select to use the price that is defined on the Product Price page for the package price.

at Component Level Select to calculate the package price as the sum of the prices for each component in the package.

Note. When you select the at Component Level option, define the price for each component of the package using the Package Component Pricing page.

Regardless of the pricing option that you select, the total price for the product package is stored in the PROD_PRICE record.

Configuration Information

If the implementation includes PeopleSoft Advanced Configurator, the check boxes in the Configured Packages group box define the configuration attributes for the product. This group box appears for products of type *Standard* and *Package.*

Configured Package Select if the product is a fully configured package. A fully configured package uses the product configurator at runtime and creates a package based on the selections for the configurator model.

Model Enter the configuration model, user interface, output, and pricing that are used to configure the package.

Template Enter the name of the agreement template that is used to record the service agreements for a service product.

Examples of service product agreements include maintenance and repair agreements, product support agreements, cleaning service agreements, and replacement warranties.

See *PeopleSoft Enterprise CRM Advanced Configurator 8.9 PeopleBook*, “Product Modeling with a Component Model”.

Inventory

This group box appears only for products of type *Standard.*

Item ID Enter an item ID to associate with the product. If you created the product from an item, the item ID on the Item Definition page appears here.

Note. Clear the Item Required check box on the Product Options page to save products without an item ID.

Agreements

This group box appears only for products of type *Service Agreement*.

Template ID Enter the name of the agreement template that defines the service agreement.

Tax Parameters

This group box appears for products of type *Service* and *Service Agreement*. The information that you enter in this group box determines how the service is classified for tax purposes.

Duration

This group box appears for products of type *Service* and enables you to enter the duration and frequency of the service.

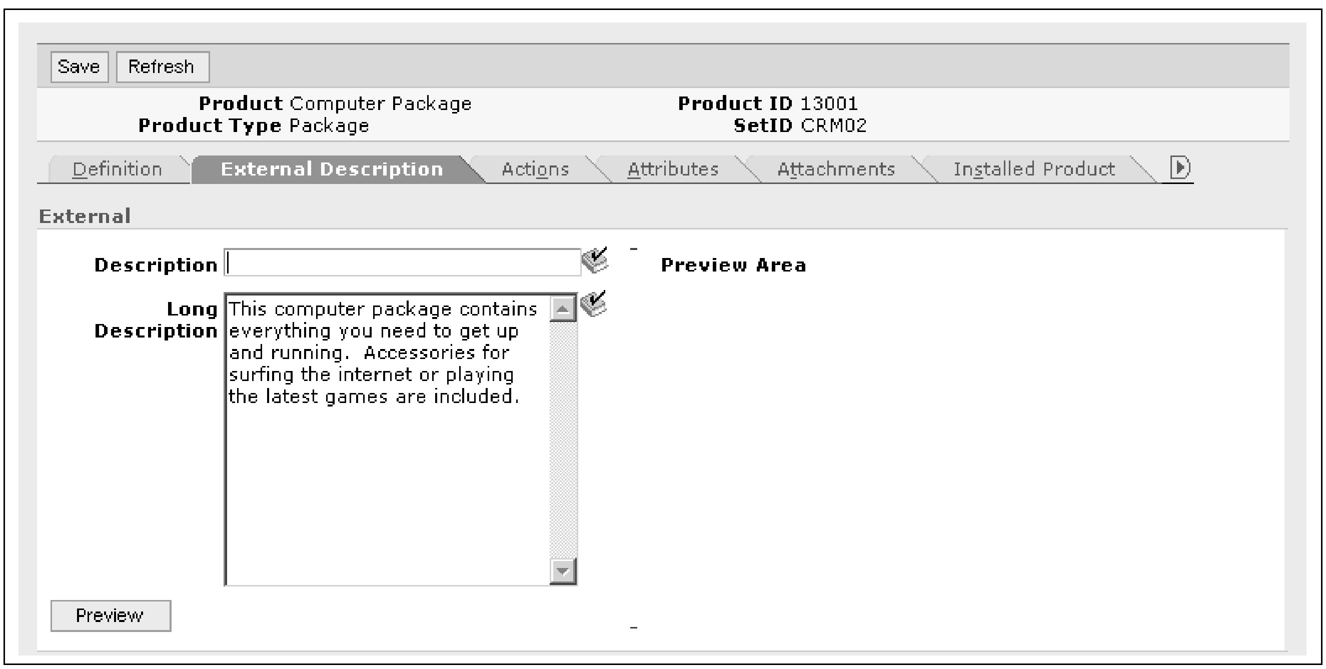
See Also

Chapter 7, "Setting Up Products," Establishing Product Prices, page 67

Chapter 3, "Setting Up Product Definitional Elements," Creating Product Definitional Elements, page 12

Defining External Product Descriptions

Access the Product Definition - External Description page.



Product Definition - External Description page

External Description and **Long External Description** Enter short and long external descriptions for the product. The text can include any HTML tags except:

- <html> and </html>
- <title> and </title>
- <header> and </header>

- <body> and </body>

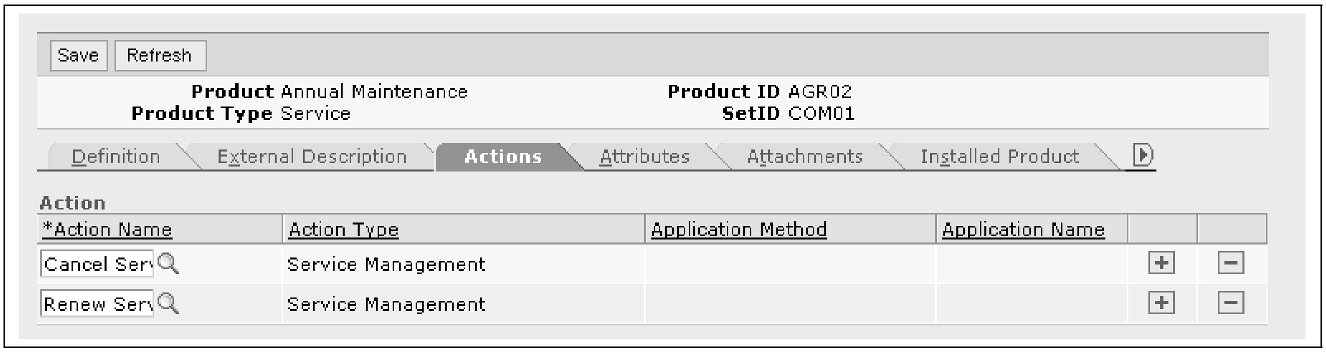
  These main structure tags are unnecessary because they are included in the standard PeopleSoft-generated page.

Note. Be sure that the HTML code follows proper HTML formatting rules.

Preview Click to preview the short and long descriptions.

Defining Product Actions

Access the Product Definition - Actions page.

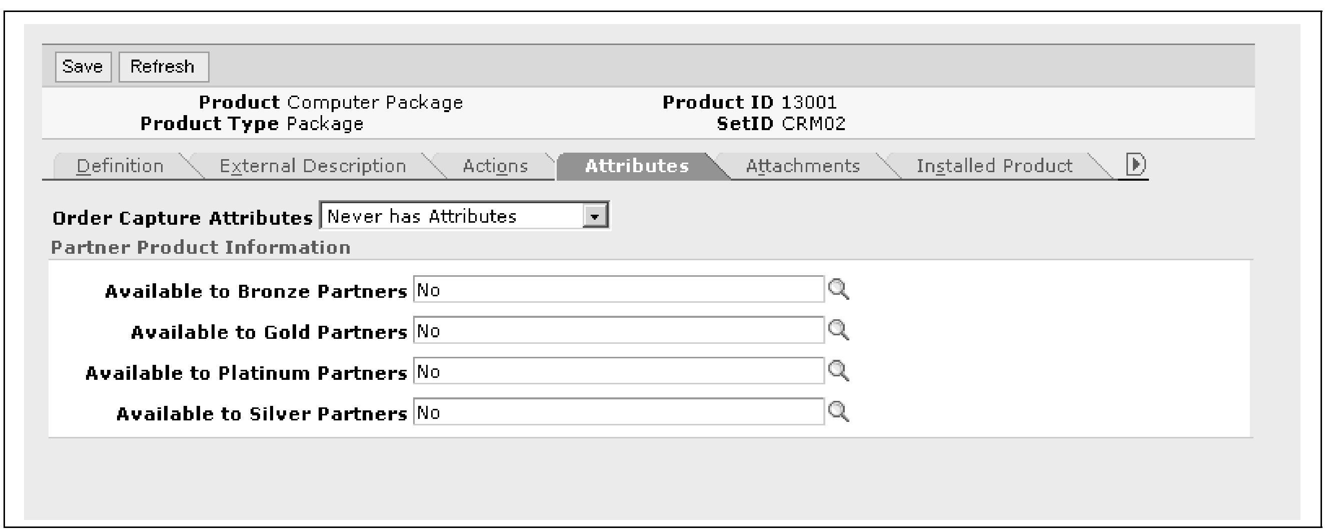


Product Definition - Actions page

This page enables you to add actions to a product and view the actions for the product. The actions that are available are determined by setID and if the action is performed by an application method, the Application Method and Application Name fields show the relevant information.

Defining Product Attributes

Access the Product Definition - Attributes page.



Product Definition - Attributes page

Order Capture Attributes Choose an option for processing of order capture line attributes. The PeopleSoft Order Capture application uses these options to determine how it processes line attributes. Setting either the *Never has Attributes* or the

Always has Attributes option increases performance because the attributes engine does not need to check for attributes when these options are set.

This field is not required. If left blank, *Conditionally has Attributes* is assumed to provide backward compatibility with existing functionality.

Possible values are:

- Never has Attributes

  Use this setting to indicate that product does not have order capture line attributes. Because attributes are never collected at order processing time for this product when this option is set, Order Capture performs better because it does not need to do the attributes calculation for the product. This increases response times when adding a product to an order and opening up existing orders.

- Always has Attribute

  Use this setting if the product has order capture line attributes. Attributes are always collected at order processing time for this product.

- Conditionally has Attributes

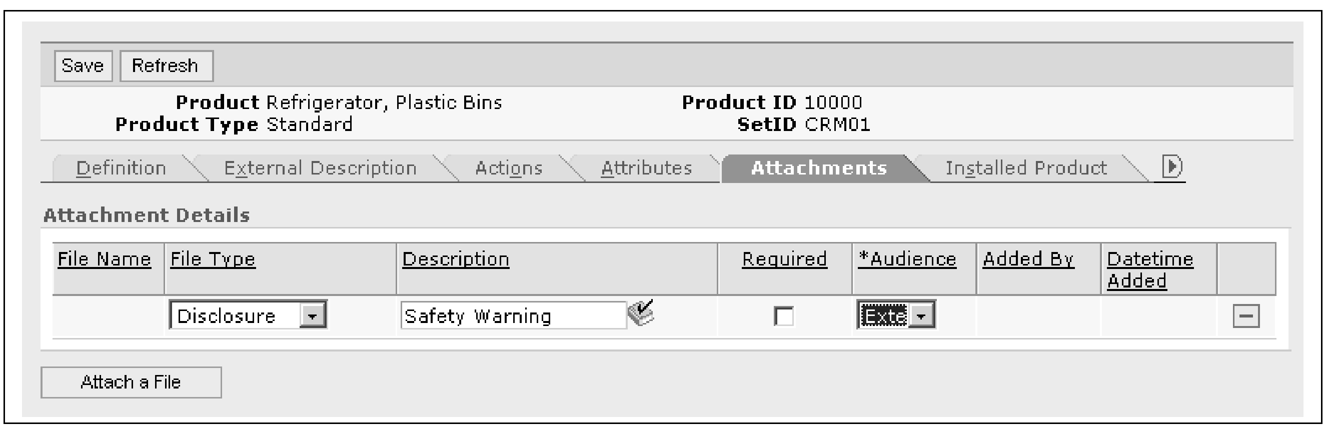
  Use this setting if the product sometimes has order capture order line attributes. Attributes are collected at order processing time under certain conditions that are based on the values of the order line. This conditional aspect of the attributes is determined at runtime by the attributes engine. Using this option can negatively affect response time.

Note. The specific attributes that you can enter on this page are defined at system installation.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, "Configuring Attributes".

Attaching Files to Product Definitions

Access the Product Definition - Attachments page.



Product Definition - Attachments page

File Name Click to view the contents of the attachment.

Type Select the attachment type. Options are*Prospectus, Disclosure, Literature,* and *White Paper.*

Required Select to indicate if the user must view the attachment before ordering the product or if the information is supplemental.

Warning! For product images uploaded to a DB2 platform, the maximum image size is 32K.

See Also

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

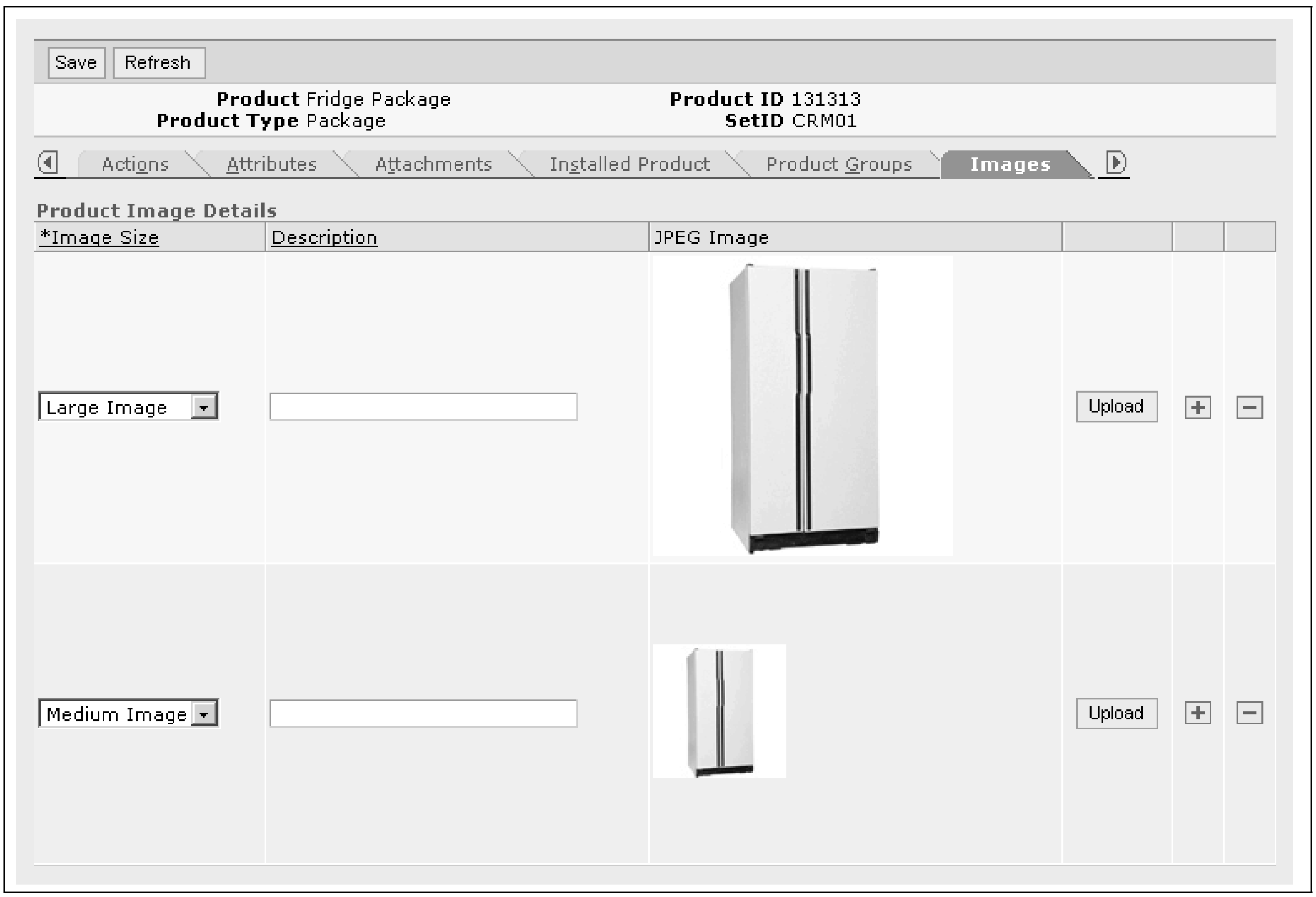
Defining Installed Product Rules

Access the Product Definition - Installed Product page.

See Chapter 9, “Tracking Installed Products,” Defining Creation and Update Rules for Installed Products, page 107 and *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Setting Up Customer Self-Service,” Setting Up Product Registration.

Attaching Images to Product Definitions

Access the Product Definition - Images page.



Product Definition - Images page

Image Size

Select the size of the image that you want to associate with the product. Options are *Large Image*, *Medium Image*, *Small Image*, and *Zoom Image*. You can attach one image of each size.

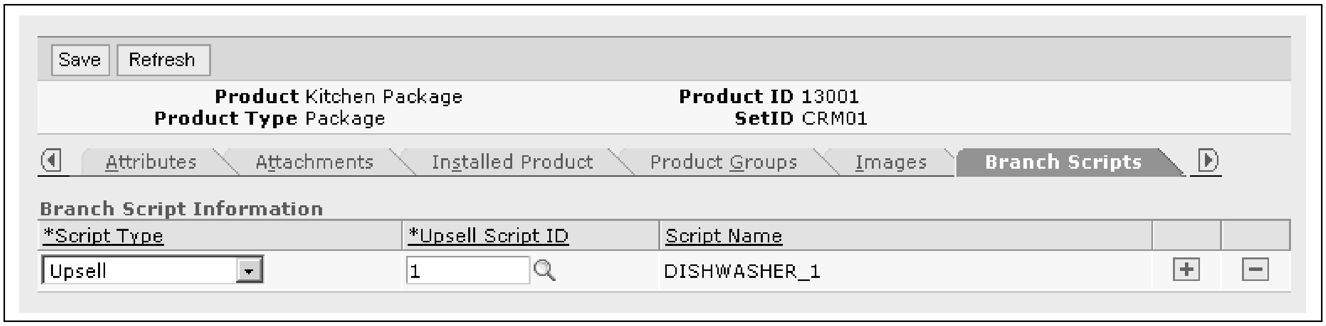
Browse

Click to locate, upload, and attach an image.

Note. You can upload and view only JPEG type images. The maximum size of the JPEG file depends on the database platform that you are using. Most systems can handle images up to 32 kilobytes.

Associating Branch Scripts with Products

Access the Product Definition - Branch Scripts page.



Product Definition - Branch Scripts page

Script Type

Select a branch script type. Options are *External Application, Internal Application*, and *Upsell.* You can save only one script per type on this page.

Note. Up-sell scripts are used to launch a series of questions that enable a customer service representative to sell products on the phone. PeopleSoft CRM uses the internal and external scripts for financial services for the Sales Entry transaction.

Script Name

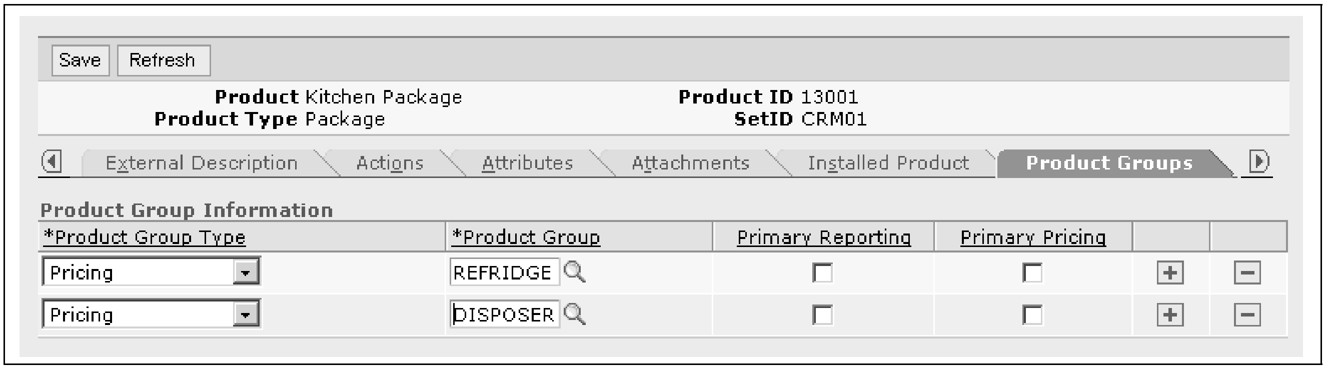
Enter the script ID number or the script name.

See Also

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

Adding Products to Product Groups

Access the Product Definition - Product Groups page.



Product Definition - Product Groups page

Product Group Type Select a product group type. The system comes with predefined product group types that fall into the following categories: pricing, reports, sales buying agreements, transportation lead times, and taxes.

Product Group Enter the number or name of a product group. A single product can belong to multiple product groups within each group type.

Primary Reporting Select to indicate a single primary reporting product group when associating multiple groups with the *Reporting* group type. Statistics are distorted if a product appears on the report under every reporting group to which the product is linked.

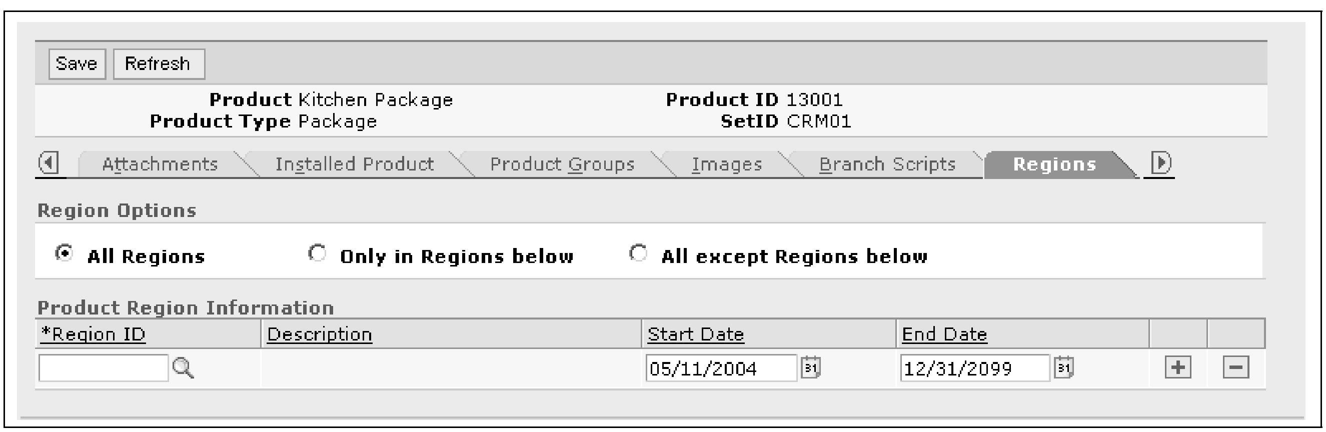
Primary Pricing Select to indicate a primary pricing product group if you've entered multiple groups of the *Pricing* group type.

See Also

Chapter 3, "Setting Up Product Definitional Elements," Defining Product Group Codes, page 14

Defining Product Availability for Regions

Access the Product Definition - Regions page.



Product Definition - Regions page

Region Options

All Regions Select if the product is available to customers in all regions.

Note. If you select this option, the system disregards the regions that are associated with particular products.

Only in Regions below Select to make the product unavailable in all regions except those that you specify.

All except Regions below Select to make the product available in all regions except those that you specify.

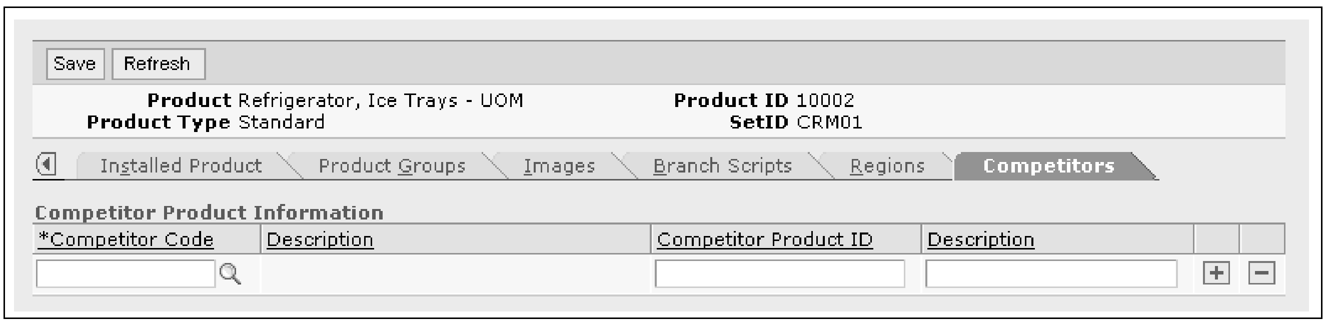
Region ID Enter one or more region codes if you select either the Only in Regions below option or the All except Regions below options.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "Setting Up General Options," Setting Up Regions

Tracking Competing Products

Access the Product Definition - Competitors page.



Product Definition - Competitors page

Competitor Code Enter a competitor code. You can create reports to perform analysis using competitor product information.

See Also

Chapter 9, "Tracking Installed Products," Defining Creation and Update Rules for Installed Products, page 107

Assigning Product UOMs

To assign product UOMs, use the Product Unit of Measure (PROD_UOM) component.

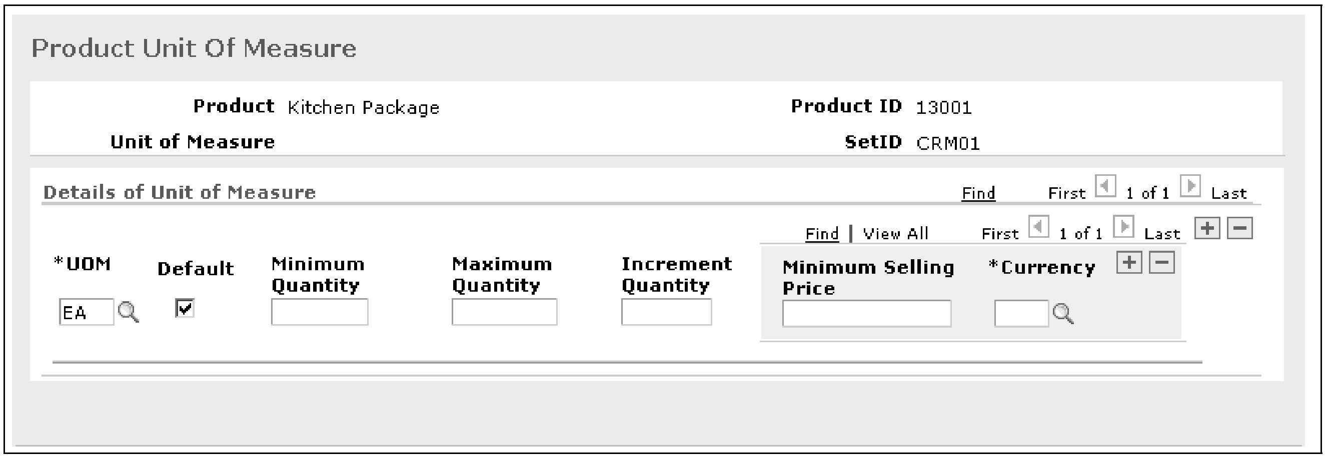
This section discusses how to assign UOMs.

Page Used to Assign Product UOMs

Page Name	Object Name	Navigation	Usage
Product Unit of Measure	PROD_UOM	Products CRM, Product Unit of Measure, Product Unit of Measure	Select the UOMs that apply to the product. Define minimum and maximum order quantities, valid order increments, and minimum selling prices for the product when sold by that UOM.

Assigning Product UOMs

Access the Product Unit of Measure page.



Product Unit of Measure page

UOM

UOM Enter a UOM that applies to sales order units for the product.

Minimum Quantity and **Maximum Quantity** Enter minimum and maximum order quantity fields. The order entry and quotation entry systems place the order line on hold if these limits are violated.

Increment Enter a value if a product can be sold only in specific increments.

See Also

Chapter 9, “Tracking Installed Products,” Defining Creation and Update Rules for Installed Products, page 107

Defining Product Package Components

To define product package components, use the Package Components (PRODKIT) component.

This section lists prerequisites and discusses how to define product package components.

Prerequisite

Before you can define product package components, you must specify a package level in the product definition.

See Also

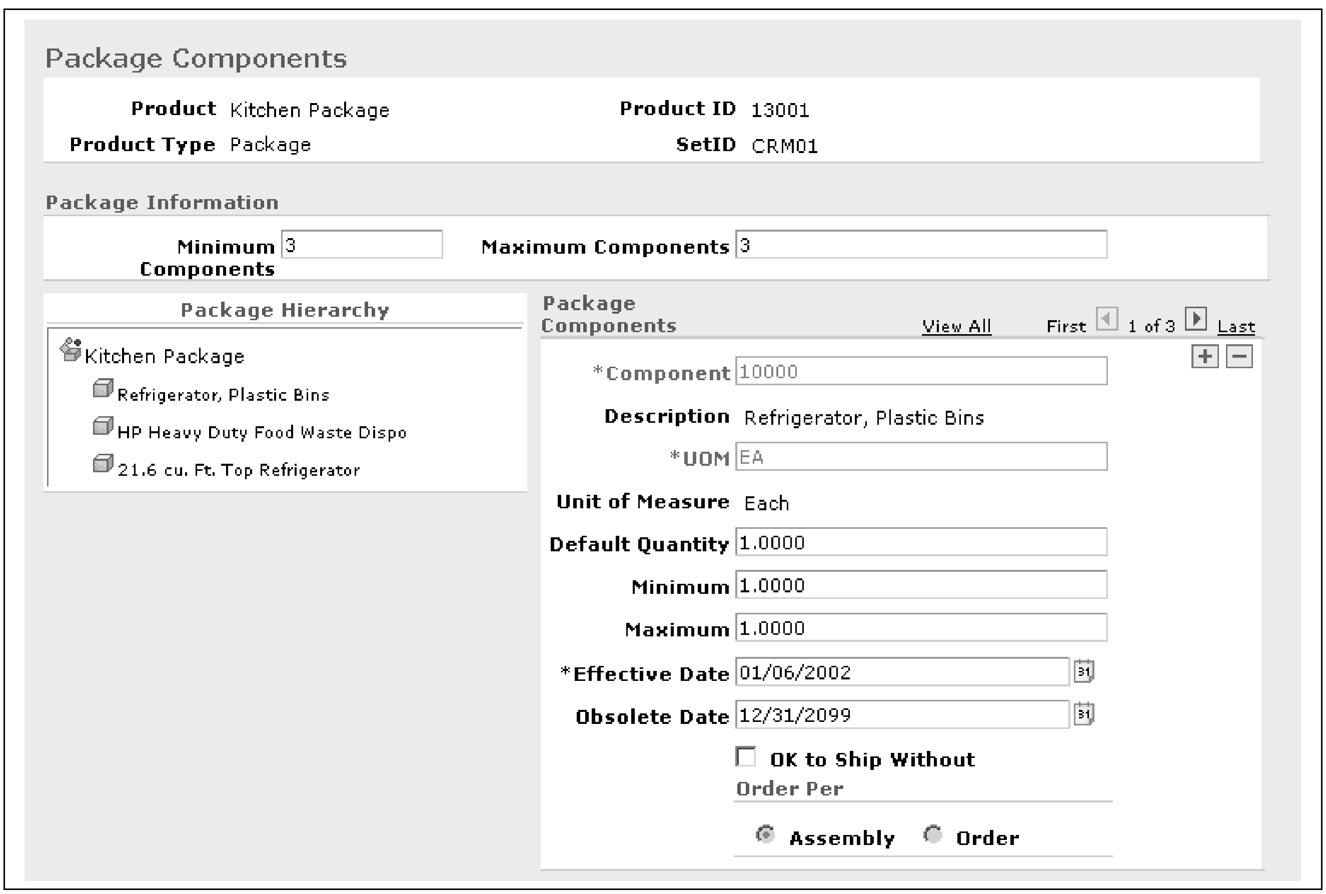
Chapter 7, "Setting Up Products," Defining Products, page 54

Page Used to Define Package Components

Page Name	Object Name	Navigation	Usage
Package Components	PRODKIT_SUMMARY	Products CRM, Package Components, Package Components	Define the components of a product package, specify the maximum and minimum number of optional or required components that a customer can select, and specify (for each component) the maximum and minimum quantity that a customer can order.

Defining Product Package Components

Access the Package Components page.



Package Components page

Minimum Total Components and **Maximum Total Components**	Enter the minimum and maximum number of components that a customer must purchase to complete an order.
Package Hierarchy	Displays the components of primary and nested packages using a tree diagram.

Package Components

Component	Enter the ID for each product or package that you want to add to the primary package. A package can consist of a number of individual products and secondary packages. **Note.** You cannot add a configured product to a package. Configured products within packages are not supported.
Default Quantity	Enter the default quantity for the component. This number must be between the minimum and maximum quantity for the component.
Assembly and **Order**	Select whether the component quantity is per package (assembly) or per order. For example, suppose that you need to deliver a manual with a computer package and the customer orders several packages. To send one manual with each ordered package, select Assembly. To send one manual with the entire order (regardless of the number of packages in the order), select Order.
Minimum and **Maximum**	Enter the minimum and maximum quantity that a customer can order per component. For example, if a particular component of a package is required but you can only order one, enter *1* in the Minimum field and *1* in the Maximum field. If a component is an optional part of a package, but you can order a maximum of two, enter *0* in the Minimum field and *2* in the Maximum field. **Note.** A minimum quantity of *0* means that the component is optional.
OK to Ship Without	Select to ship the available product package components without waiting for this component.

Establishing Product Prices

To establish product prices, use the Product Price (PROD_PRICE) and the Package Component Pricing (PRODKIT_COMPS_PRC) components

This section provides an overview of product pricing and discusses how to:

- Set prices for individual products or product packages by using top-level pricing.
- View prices for package components.

Understanding Product Pricing

The sources and definitions of product prices vary depending on how you define products. Note these differences:

- Prices for products that are created in PeopleSoft SCM or a third-party SCM system are defined by inventory business units unless the product is nonstockable (for example, a service such as installation).

  When you synchronize with a SCM system, you must enter the inventory business units into the Business Unit table in the PeopleSoft CRM system.

- Product definitions created in PeopleSoft CRM do not require the inventory business unit field.

  In PeopleSoft CRM, the inventory business unit is unknown when a product is ordered, and the system uses the lowest price from any inventory business unit associated with the product.

See Also

Chapter 4, "Defining Items," Understanding Item Definition in PeopleSoft CRM, page 19

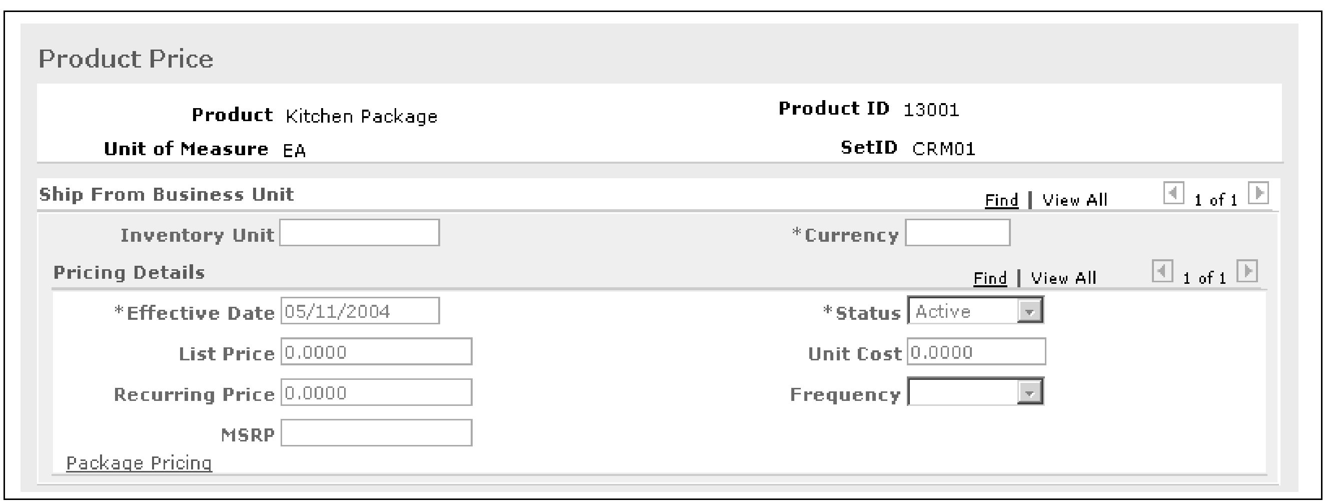
PeopleSoft Inventory 8.8 PeopleBook

Pages Used to Establish Product Prices

Page Name	Object Name	Navigation	Usage
Product Price	PROD_PRICE	Products CRM, Price, Product Price	Set prices for standalone products and for product packages by using top-level pricing.
Package Component Pricing	PRODKIT_COMPS_PRC	Products CRM, Package Component Pricing, Package Component Pricing	View prices for each package component for product packages that uses component-level pricing.

Setting Prices for Individual Products or Product Packages by Using Top-Level Pricing

Access the Product Price page.



Product Price page

Ship From Business Unit

Inventory Unit

Enter the warehouse's inventory business unit. This field is validated against the BUS_UNIT_TBL_FS table in PeopleSoft CRM. This field is optional for a noninventoried product.

Note. Inventory business units are established in PeopleSoft SCM or the order fulfillment system. They are synchronized with PeopleSoft CRM using a business unit enterprise integration point (EIP).

Currency

Enter the currency that is used for the inventory business unit.

Pricing Details

List Price

Enter the product list price. The system applies price adjustments against the list price.

Frequency

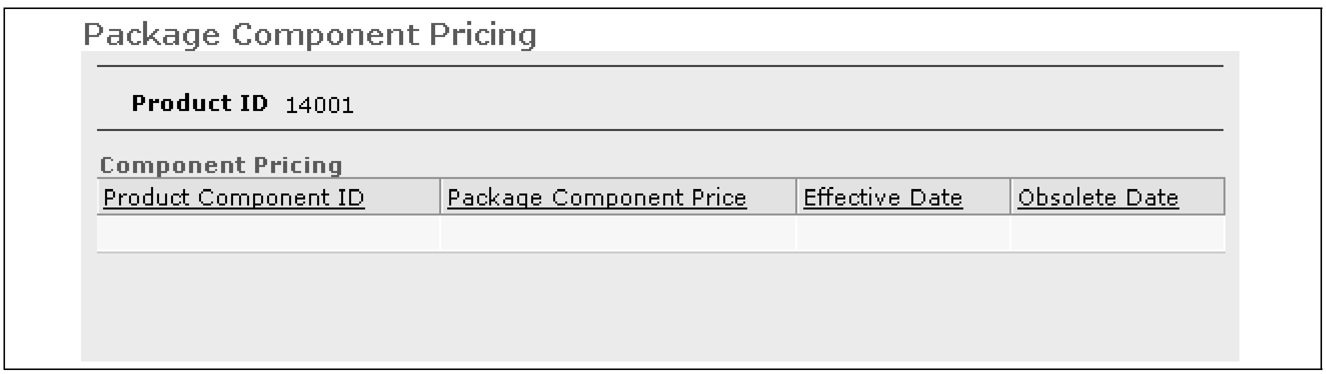
Select the frequency of the recurring price.

Package Pricing

Click to view package component pricing details (available only for packages that are priced at the component level).

Viewing Prices for Package Components

Access the Package Component Pricing page.



Package Component Pricing page

This page lists the components of the package, the dates on which the component became part of the package, and the date it became obsolete in the package.

See Also

Chapter 7, "Setting Up Products," Assigning Product UOMs, page 64

Chapter 7, "Setting Up Products," Defining Product Package Components, page 65

Chapter 7, "Setting Up Products," Defining Products, page 54

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, "Setting Up Currencies," Setting Up Currencies

Managing Product Relationships

This section provides an overview of product relationships, lists prerequisites, and discusses how to define product relationships.

Understanding Product Relationships

PeopleSoft CRM comes with a number of predefined relationship types that enable you to define relationships between products:

- Complement

  A complement is an accessory to another product. For example, a headset or carrying case might be a complement to a cell phone.

- Cross-sell

  A cross-sell is a product that enhances or extends the capabilities of another product. For example, a DVD player might be a cross-sell for a television.

- Up-sell

  An up-sell is a product that is superior to the product that the customer inquires about or orders.

- Product alternate

  A product alternate is offered in place of another. For example, suppose that the delivery time for a product does not meet the customer's needs. In that case, you might offer a product alternate.

- Prerequisite

  A prerequisite is a product that is required for another product to function properly.

- Replacement product

  A replacement product is offered in place of another product that a customer orders if the original product is no longer available.

- Service feature

  A service feature for a product enhances the main product or service. For example, related service features for wireless service might include caller ID and call waiting.

- Agreement

  Relates products to all the service agreements that cover that product.

Prerequisites

Before you define relationships between products, you must:

1. Review the available relationships that are delivered with the system.
2. Define additional relationships that are required by the business.
3. Specify optional relationship attributes.

See Also

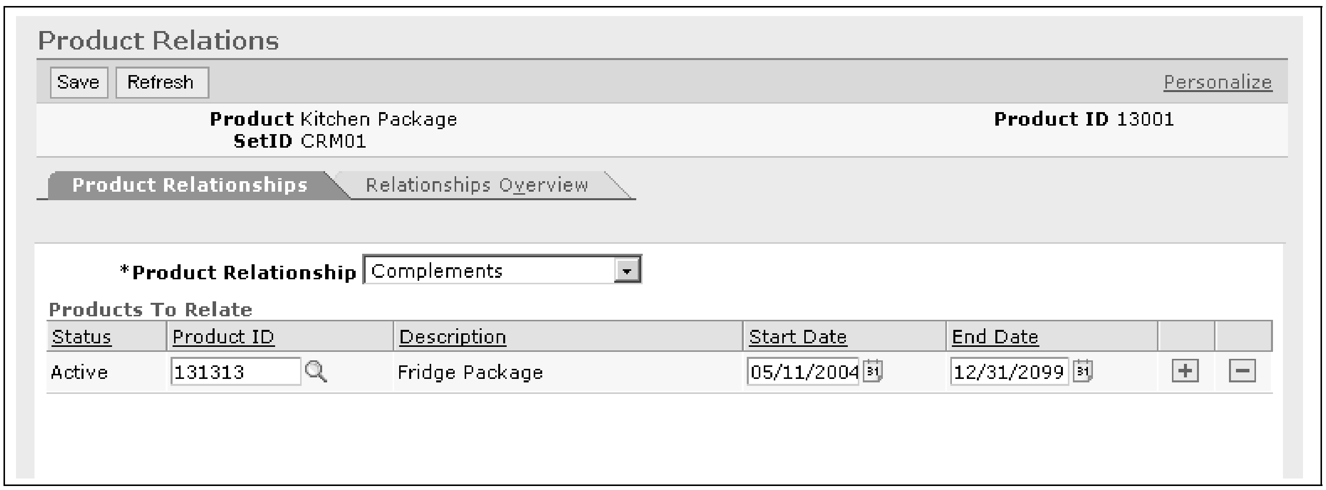
Chapter 3, "Setting Up Product Definitional Elements," Setting Up Product Relationship Codes, page 15

Pages Used to Manage Product Relationships

Page Name	Object Name	Navigation	Usage
Product Relations	PROD_RELATIONS	Products CRM, Relationships, Product Relationships	Define relationships between products.
Relationships Overview	PROD_REL_OVERVIEW	• Products CRM, Relationships, Relationships Overview • Click the View All link on the Product Relationships page.	View effective relationships between products.

Defining Product Relationships

Access the Product Relationships page.



Product Relations page

Product Relationship Select the relationship between the product in the Product field and the product in the Product ID field.

Product ID Enter the ID of the product that you are relating to the product in the Product field.

Start Date and **End Date** Enter the start and end dates of the relationship.

Entering Product Notes

This section lists prerequisites and discusses how to enter product notes.

Prerequisite

Before you can associate a standard note with a product, you must define the note on the Standard Notes page.

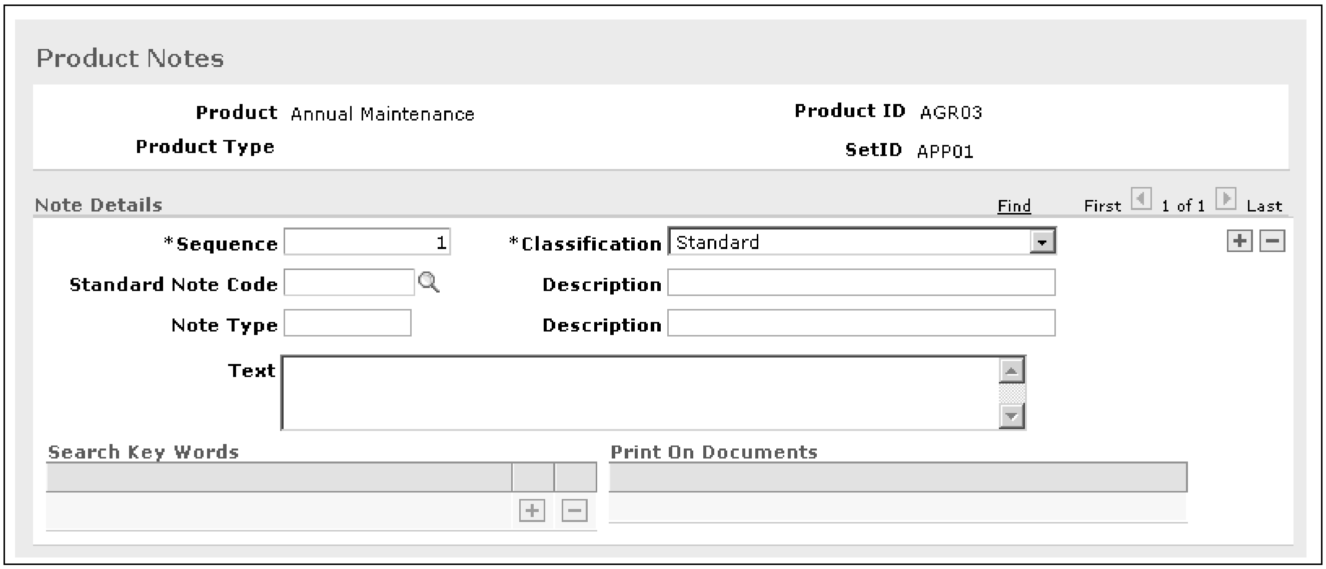
See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Working with Notes and Attachments”.

Page Used to Define Product Notes

Page Name	Object Name	Navigation	Usage
Product Notes	PROD_NOTE	Products CRM, Product Notes, Notes	Enter standard or custom product notes.

Entering Product Notes

Access the Notes page.



Notes page

Sequence Enter a sequence number to specify the order in which notes appear on documents.

Classification Select *Standard* or *Custom*.

Standard Note Code Enter the code of a standard note to associate with the product.

Note Type Enter the note type for a custom note associated with the product.

Text Enter the note text for a custom note. If you use a standard note, this field displays the predefined note text.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Working with Notes and Attachments,” Setting Up Note Types

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

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

CHAPTER 8

Creating Catalogs

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

- Create display templates.
- Define catalog content and permissions.
- Search catalogs.

Understanding Catalogs

Catalogs are a single group of products or services that are marketed and displayed together because they share common criteria. PeopleSoft Customer Relationship Management (PeopleSoft CRM) enables you to define the layout and content of online catalogs for internal and external use. You define the look and feel of catalogs by creating display templates, and then define the contents that you want to organize and present according to the template definitions. You can designate products for inclusion in a catalog either by direct association (using product IDs) or by creating business rules to dynamically build product content based on the selection criteria that you define. Similarly, you can control user access to catalogs by associating a Security Membership List with specific catalogs.

Catalogs in PeopleSoft CRM

You can access and search catalogs from different locations within PeopleSoft CRM, and different functional areas within the CRM applications are highly dependent on catalog definitions. Catalogs can be used and searched by external customers who are purchasing products or services, internally by customer service representatives (CSRs) who need product information, and by others within an enterprise. Catalogs can use PeopleSoft Real-Time Advisor dialogs to help direct an end user toward recommended products in the catalog. Catalogs and catalog data are accessible from within and outside of PeopleSoft CRM.

Internally

Catalog information is available from:

- PeopleSoft Order Capture

  In PeopleSoft Order Capture, CSRs access catalog data and run catalog searches from the Entry form to obtain up-to-date information about products prior to entering an order or providing quotes. In addition, access to products can be limited and validated against catalogs when a product is added to the order. CSRs can then use the product comparison tool, drill into product details, and copy products from the search results back to the order entry form. Additionally, the CSR can use PeopleSoft Real-Time Advisor to retrieve catalog data.

Note. Users can navigate to Product Search in PeopleSoft Order Capture and enter search criteria. They can also personalize the PeopleSoft CRM portal to display a product search pagelet (if the portal pack is installed). Once in a catalog, users can access PeopleSoft Real-Time Advisor, which retrieves catalog data based on answers to questions.

- PeopleSoft Sales

  From Lead and Opportunity, users can drill into the Product Search component and perform keyword searches for products. Users can then use the product comparison tool, drill into product details, and copy products from the search results back to PeopleSoft Sales.

Externally

Catalog information is available from:

- PeopleSoft Order Capture Self Service.

  You can link to product detail pages from order lines, access and browse catalogs, and access PeopleSoft Real-Time Advisor, which retrieves catalog data and offers recommendations based on a user's response to Advisor dialogs.

- Customer registry or home page.

  Users can browse and search the catalog. Or, once in a catalog, they can access PeopleSoft Real-Time Advisor, which retrieves catalog data and offers recommendations based on question and answer dialogs. Customers can also customize the PeopleSoft CRM portal to display a catalog search pagelet (if the portal pack installed).

Prerequisites

Before you create catalog display templates or define a catalog's content, you must define products using the Define Products component. In addition, because creating display templates and defining catalog content are interdependent setup steps, a catalog is not fully defined until you define both templates and content.

See Also

Chapter 7, "Setting Up Products," Managing Product Relationships, page 70

Creating Display Templates

This section provides an overview of display templates and discusses how to:

- Define catalog display pages.
- Define products and nested catalog display pages.
- Define product comparison pages.
- Define product detail display pages.
- Define featured product displays.

Understanding Display Templates

You can create display templates to define a catalog's layout and organization. Note that this is separate task from defining what products the catalog contains. You can then apply the same reusable templates to different product collections defined in Catalog Setup. Defining layout and presentation separately from content enables you to easily modify, update, and recombine both products and presentational formats to meet different user and display requirements.

Template Setup Procedures

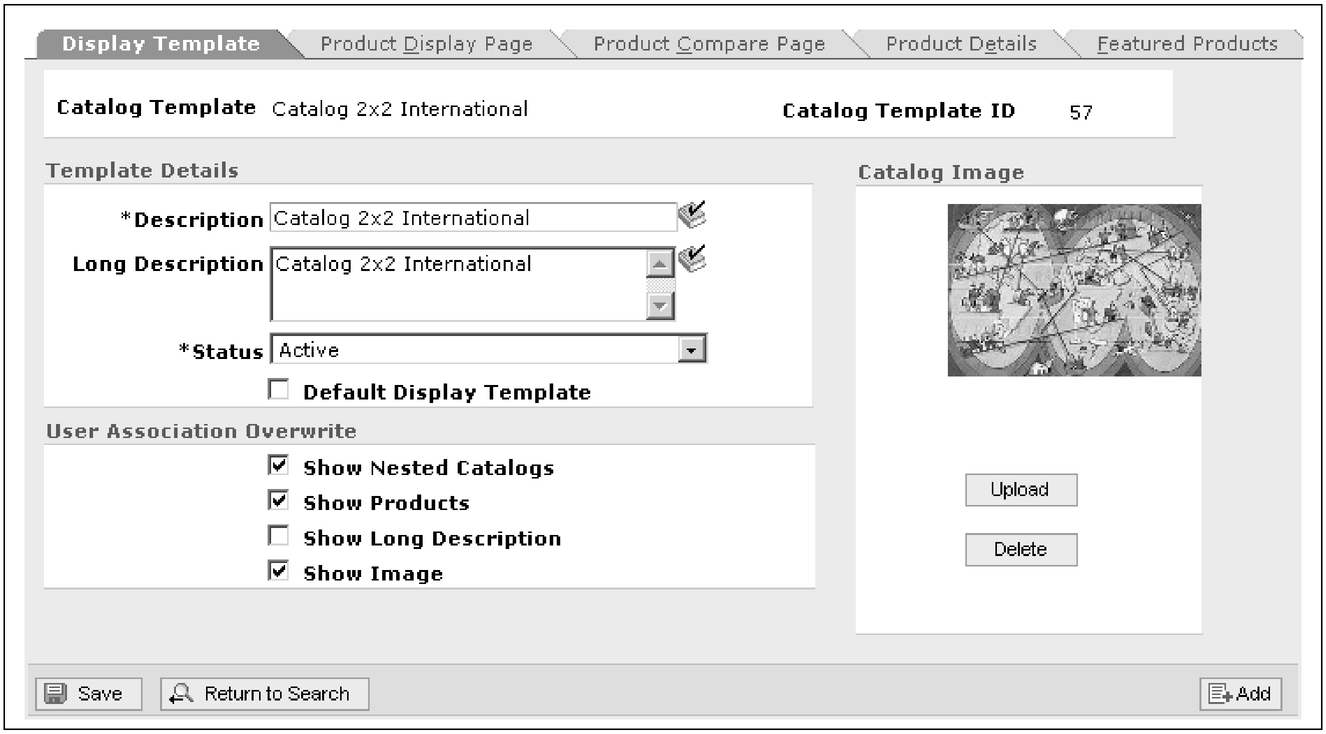
Define display templates using the Catalog Template Setup component. Each page in this component controls the look and feel of one or more corresponding pages or displays in the online product catalog. The catalog display page is the initial page that users access. It contains a list of catalogs and associated images. The product display page is normally the second page that users access; it can display both products and nested catalogs (as well as associated images). Access this page from a link on the catalog display page.

Pages Used to Create Display Templates

Page Name	Object Name	Navigation	Usage
Display Template	RO_DISPLAY_TEMPL	Catalog Management CRM, Catalog Template Definition	Define the look and feel of catalogs and product display pages in online catalogs.
Product Display Page	RO_PRODUCT_DISPLAY	Catalog Management CRM, Catalog Template Definition	Define the look and feel of product display pages in online catalogs.
Product Compare Page	RO_PRODUCT_COMPARE	Catalog Management CRM, Catalog Template Definition	Define the look and feel of product comparison pages in online catalogs.
Product Details	RO_PRODUCT_DETAIL	Catalog Management CRM, Catalog Template Definition	Define the look and feel of product details pages in online catalogs.
Featured Products	RO_PRODUCT_FEATURE	Catalog Management CRM, Catalog Template Definition	Define featured products displays.
Product Search	RO_PRODUCT_SEARCH	Catalog Management CRM, Catalog Template Definition	Controls the visibility options from the product search.

Defining Catalog Display Pages

Access the Display Template page.



Display Template page

Template Details

Description and **Long Description**
Enter a short and long description for the display template.

Status
Select if the display template is *Active*or *Inactive*.

Default Display Template
Select to make this the default display template. PeopleSoft Order Capture uses the default template to determine the catalog page display when a display template is unavailable. For example, because users do not initiate product searches from within a particular catalog, how do you know which catalog product details definition to display when the user clicks a particular product after searching for it? In this case, the default catalog definition displays the product details. The same is true when a user drills into a particular product on an order. Similarly, the first page that users see when browsing catalogs is a list of catalogs. The catalog engine uses the default display template to determine whether or not to display the catalog images and long descriptions of these catalogs (catalog images appear if you select the Images check box on the Product Display Page page).

Note. Only one default display template is valid in the system.

User Association Overwrite

Show Nested Catalogs
Select to have a catalog’s secondary, nested catalogs (if any) appear on the product display page and to give users access to them.

Show Products
Select to have products or services that are associated with a catalog appear on the product display page and to enable users to drill into product details.

Show Long Description

Select to have the long description of a catalog appear. Otherwise, the system displays the short description from the Product Catalog page.

Note. Enter the long description of catalogs on the Product Catalog page.

Show Image

Select to show an image if a catalog has no image. You must upload the filler image on this page.

Note. If the catalog has an image and you want it to appear on the initial catalog display page, select Images on the default template's Product Display Page page.

Note. Select the image representing a catalog on the Product Catalog page.

Catalog Image

Upload

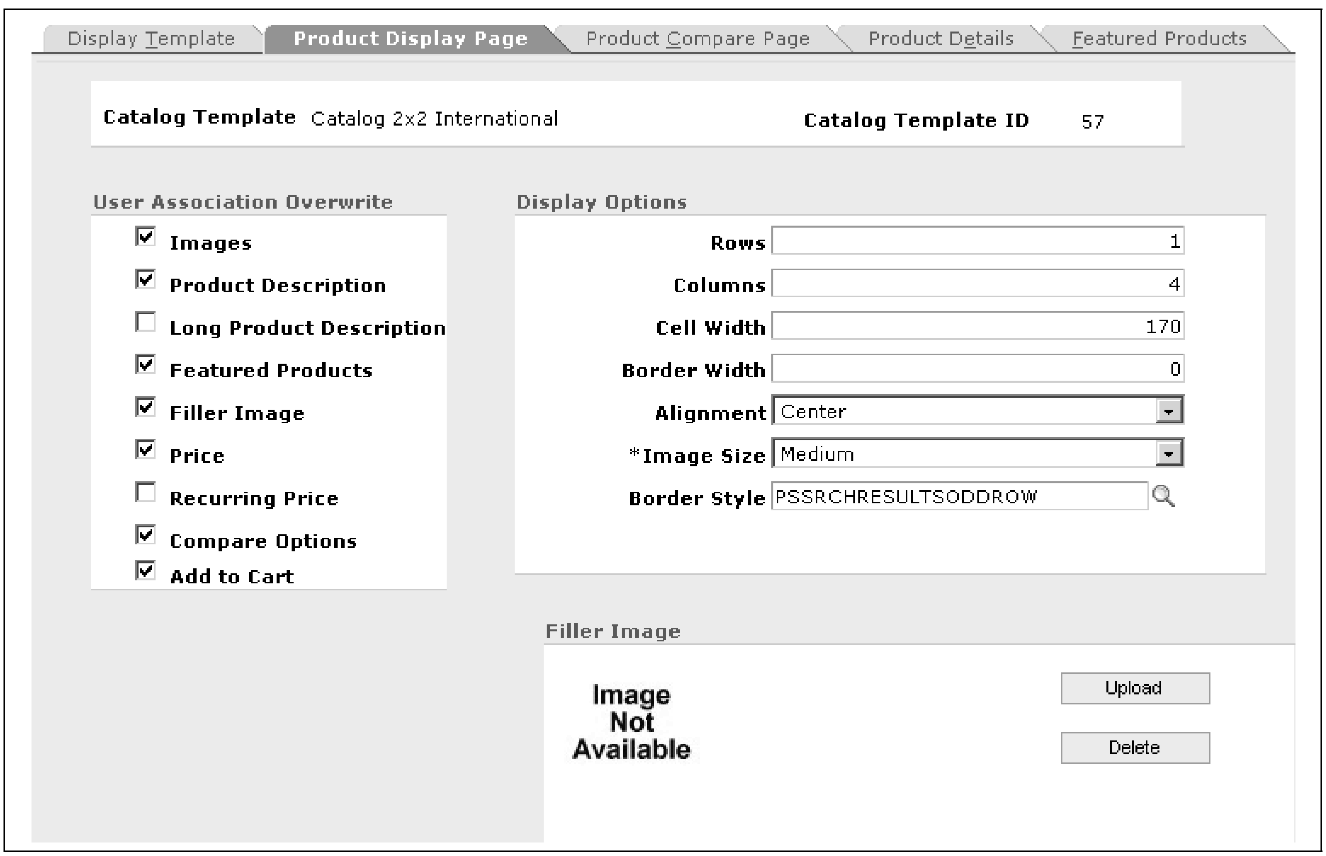
Click to upload a filler image to use when a catalog image is not available or to display no catalog image.

Delete

Click to delete the filler image.

Defining Product Displays

Access the Product Display Page page.



Product Display page

User Association Overwrite

Images

Select to display product and nested catalog images on the catalog's product display page. These images will function as links to product detail and product display pages.

Note. Associate images with catalogs on the Product Catalog page. Associate images with products on the Images page in the Product Definition component.

Product Description

Select to show products' short descriptions on the product display page. These descriptions will function as links to product detail pages.

Note. Short descriptions come from the External Description page in the Product Definition component.

Long Product Description

Select to show products' long descriptions on the catalog's product display page.

Featured Products

Select to identify products that are marked as *Featured* on the catalog's product display page.

Note. Define the look and feel of featured products on the Featured Products page of the Catalog Template Setup component. Select actual products to be featured in a catalog on the Featured Products page of the Catalog Setup component.

Filler Image

Select to show a filler image on the catalog's product display page if a product has no image associated with it. You must upload the filler image on this page.

Price

Select to show product prices on the catalog's product display page.

Note. The product price is for single, one-time charges. Prices can come from price sets that are defined in the pricing engine, the List Price field on the Product Price page, or the List Price field on the Package Component Pricing page (if the product is a package that is priced at the component level).

Recurring Price

Select to show recurring prices on the second catalog display page.

Note. A recurring price is a price that is charged at periodic intervals, such as a magazine subscription fee. Define recurring prices on the Price List page.

Compare Options

Select to enable users to compare products (compare check boxes and a Compare button appear on the catalog's product display page).

Note. You cannot include nested catalogs in comparisons.

Add to Cart

Select to enable users to add products to their cart.

Display Options

Rows

Enter the number of rows of products or nested catalogs you want to appear on the catalog's product display page.

Columns	Enter the number of columns of products or nested catalogs you want to appear on the catalog's product display page.
Cell Width	Enter the cell width for a single nested catalog or product on the product display page. If you leave this field left blank, the cells expand and shrink based on their contents, and each column expands to the largest width of any child cell.
Border Width	Enter the width of the cell borders.
Alignment	Select *Center, Right,* or *Left.*
Image Size	Select *Large, Medium, Small,* or *Zoom.*

Note. Size refers to the Product Image page and the corresponding image sizes that are loaded there per product. For nested catalogs, it uses the image (and size) that is loaded to the catalog.

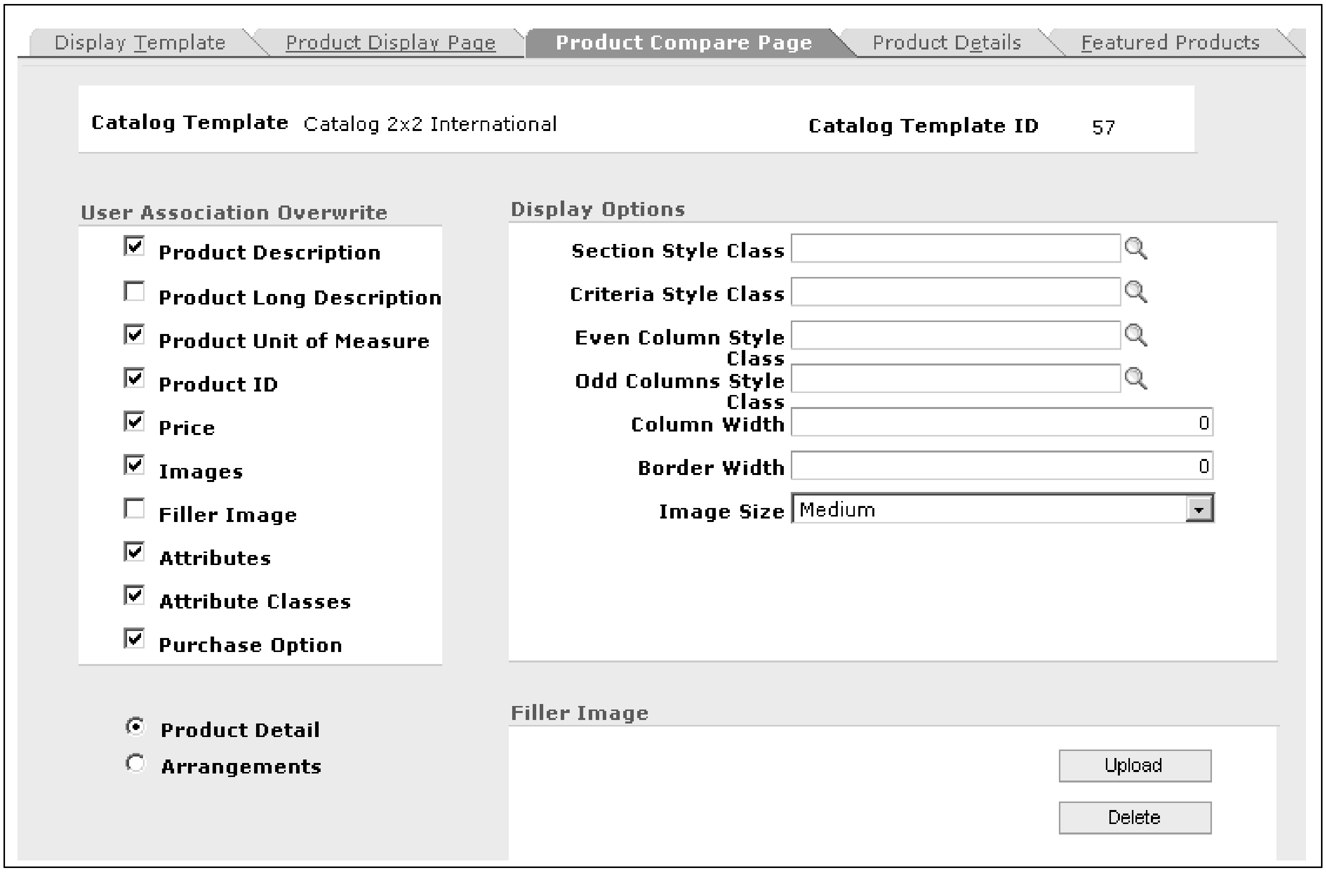
Border Style	Select the style class of the cell borders. The background color of a cell's style class determines the cell's border color.

Filler Image

Browse	Click to attach a filler image to use on the product display page when a product image is not available or to display no product image.
Delete	Click to delete the filler image.

Defining Product Comparison Displays

Access the Product Compare Page page.



Product Compare page

Product Detail Select to have users access the Catalog's Product Detail page when they drill into a product on the Compare page.

Arrangements Select to have users access the Financial Services Arrangements/Terms and Conditions page when they drill into a product on the Compare page.

User Association Overwrite

Product Description Select to show products' short descriptions on the catalog's product comparison page.

Note. Short descriptions come from the External Description page in the Product Definition component.

Product Long Description Select to show products' long descriptions on the comparison page.

Note. Long descriptions come from the External Description page in the Product Definition component.

Product Unit of Measure Select to show a product's default unit of measure (UOM) in a comparison.

Note. Set the default UOM on the Product Attributes by UOM page.

Product ID Select to show the Product ID on the comparison page.

Price Select to display product prices in a comparison.

Note. The product price is for single, one-time charges. Prices can come from price sets that are defined in the pricing engine, the List Price field on the Product Price page, or the List Price field on the Package Component Pricing page (if the product is a package that is priced at the component level).

Images Select to show product images on the catalog's comparison page.

Note. Associate images with products on the Images page in the Product Definition component.

Filler Image Select to use a filler image if a product has no image associated with it. You must upload the filler image on this page.

Attributes Select to display product attributes in a comparison. Only attributes whose group usage type is *Information* appear in a product comparison.

Note. Define product attributes on the Attributes page in the Define Products component. Define attribute group usage types on the Attribute Groups page.

Attribute Classes Select to organize the attributes that appear in a comparison into attribute classes or types. For example, materials, dimensions, and patterns are different attribute classes.

Purchase Option Select to add a Purchase This Product link to the catalog's comparison page. Users click this line to access the product's details page, where they find the Add to Cart button (if enabled on the Product Details page).

Display Options

Section Style Class Enter the style class to use for the comparison page section headers.

Criteria Style Class Enter the style class to use for the comparison page column that contains the elements to be compared (the leftmost column on the page).

Even Column Style Class Enter the style class to use for the second (even-numbered) product column on the comparison page.

Odd Columns Style Class Enter the style class to use for the odd-numbered product columns on the comparison page.

Column Width Enter the width of the columns on the comparison page. If you leave this field blank, the columns expand and shrink based on their contents, and each column expands to the largest width of any child column.

Border Width Enter the width of the border between all of the columns and rows in the comparison table.

Image Size Select *Large, Medium, Small,* or *Zoom.*

Note. Size refers to the Product Image page and the corresponding image sizes that are loaded there per product. For nested catalogs, it uses the image (and size) that is loaded to the catalog.

Filler Image

Upload

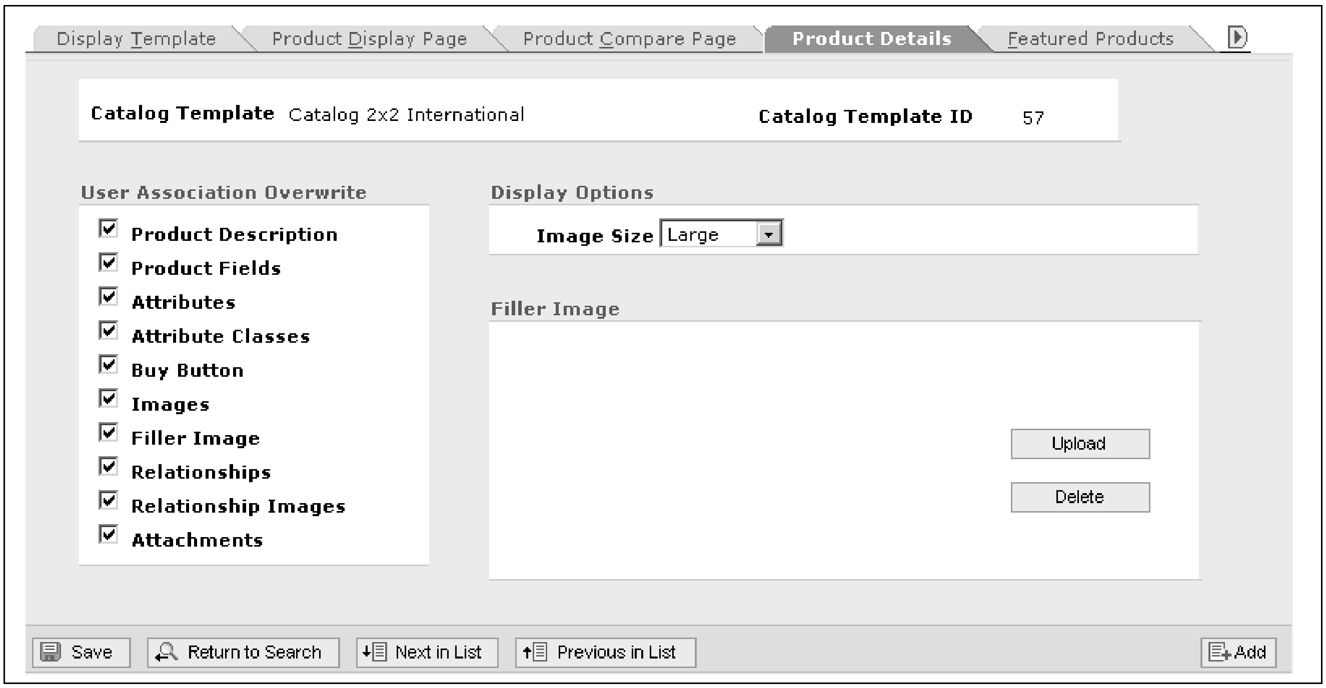
Click to upload a filler image to use on the product display page when a product image is not available or to display no product image.

Delete

Click to delete the filler image.

Specifying Product Detail Displays

Access the Product Details page.



Product Details page

User Association Overwrite

Product Description

Select to display product short descriptions on the catalog’s product details page.

Note. Short descriptions come from the External Description page in the Product Definition component.

Product Fields

Select to display product fields on the catalog’s product details page. These fields include Unit of Measure, Quantity, Price, and Recurring Price.

Attributes

Select to display product attributes on the details page. Only attributes whose group usage type is *Information* appear on the product details page.

Note. Define product attributes on the Attributes page in the Define Products component. Define attribute group usage types on the Attribute Groups page.

Attribute Classes

Select to organize the attributes that appear in a comparison into attribute classes or types. For example, materials, dimensions, and patterns are different attribute classes.

Buy button Select to enable the Add to Cart button and functionality to the product details page.

Images Select to display product images on the catalog's product details page.

Note. Associate images with products on the Images page in the Product Definition component.

Filler Image Select to use a filler image if a product has no image associated with it. Upload the filler image on this page.

Relationships Select to show product relationships on the product details page. In PeopleSoft CRM, products can be related to other products as cross-sell or up-sell opportunities, function as alternates or replacements for other products, complement other products, or be defined as prerequisites for the purchase of other products. These relationships can appear on the product details page to promote additional sales opportunities.

Note. Define relationships between products on the Product Relationships page.

Relationship Images Select to display images of related products on the catalog's product details page.

Attachments Select to enable the Attachment functionality.

Display Options

Image Size Select *Large, Medium, Small,* or *Zoom.*

Note. Size refers to the Product Image page and the corresponding image sizes that are loaded there per product. For nested catalogs, it uses the image (and size) that is loaded to the catalog.

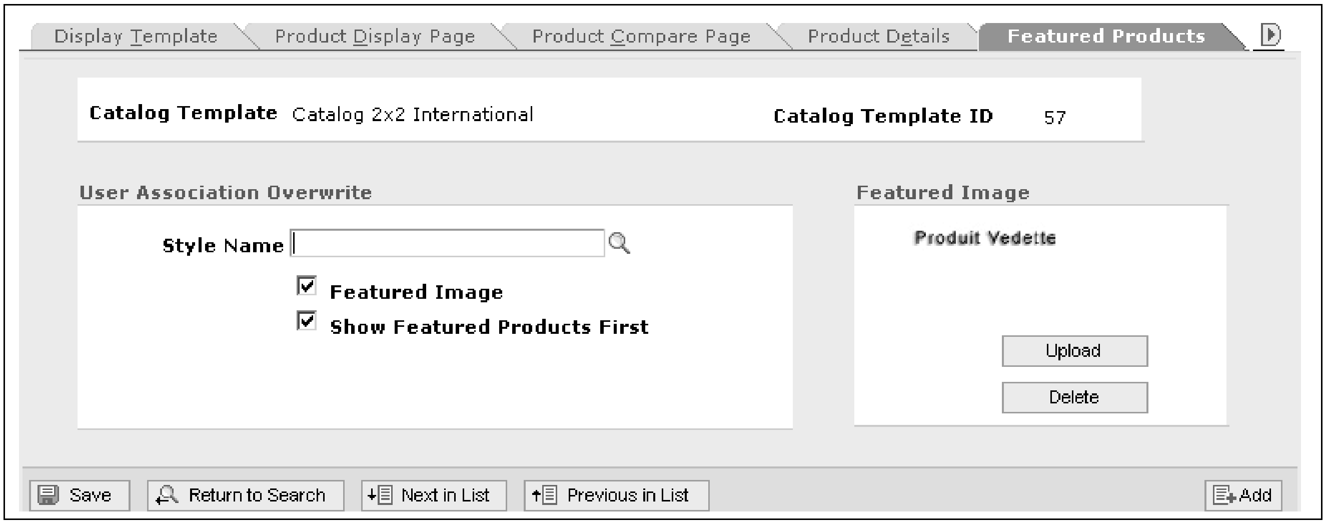
Filler Image

Upload Click to upload a filler image to use when a product image is not available or to display no product image.

Delete Click to delete the filler image.

Defining Featured Products Displays

Access the Featured Products page.



Featured Products page

User Association Overwrite

Style Name Enter a cell style to use for featured products.

Featured Image Select to have the image that is uploaded on this page to appear on catalog display pages when a product is marked as *Featured.*

Show Featured Products First Select to have all of the products that are marked as *Featured* appear before other products. This option is preferable if you want to promote certain products so that users see them first.

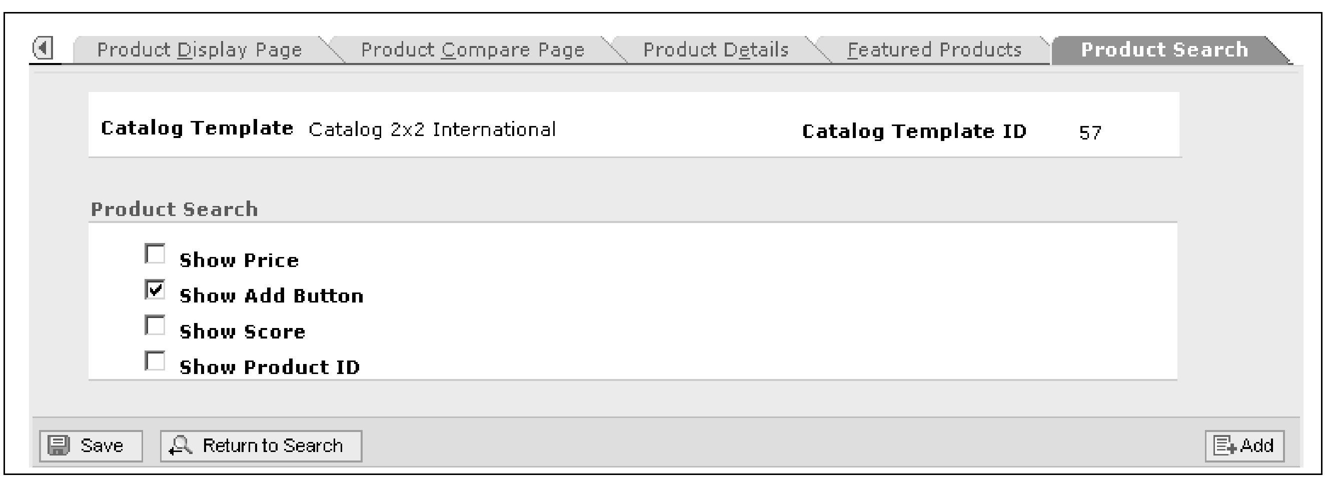
Featured Image

Upload Click to upload a filler image to use when a product image is not available or to display no product image.

Delete Click to delete the filler image.

Specifying Product Search Options

Access the Product Search page.



Product Search page

Product Search

Show Price	Select to show the price of the products in Search Results on the Product Search page.
Show Add Button	Select to show the Add button in Search Results on the Product Search page.
Show Score	Select to show the Score in the Search Results area on the Product Search page.
Show Product ID	Select to show the Product ID in the Search Results area on the Product Search page.

Defining Catalog Content and Permissions

This section provides an overview of catalog content and permissions and discusses how to define catalog content and permissions:

Understanding Catalog Content and Permissions

PeopleSoft CRM enables you to generate catalogs dynamically based on rules that you define online. These rules determine which products appear in catalogs, who can access catalogs, and which products are featured in catalogs. You can also link products to catalogs and define user access by direct association using product IDs and user IDs.

Catalog Content and Features

You can associate both standard and featured products with catalogs by:

- Direct association

  Direct association enables you to link specific product IDs to one or more catalog IDs. Only products associated with a catalog ID can appear in the catalog.

- Business rule association

  Business rule association enables you to define a rule that is based on field values such as product brand, product category, and product group as well as other product attributes. For example, you could define a rule that specifies that only a specific product brand can appear or be featured in a catalog. If you want, you can include more than one attribute and value pair in a single product association rule. For example, you could use these two associations to create a catalog for Company X laptops and Company Z workstations:

  Condition 1: Product category = laptop and brand = Company X.

  or

  Condition 2: Product category = workstation and brand = Company Z.

  Each condition in the rule involves an association between two values, a product category and a brand, which are joined together using the where clause operator *and.* However, the relationship between conditions is based on the where clause operator *or,* meaning that any product that satisfies either condition 1 or condition 2 appears in the catalog.

Note. The system interprets rule conditions that are defined on the same row or scroll to be joined by the *and* operator and conditions that are defined on different rows or scrolls to be joined by the *or* operator.

User Permissions

In PeopleSoft CRM, you can control access to catalogs by:

- Direct association

  Direct association enables you to link specific user IDs to one or more catalog IDs. Only users who are associated with a catalog can access the catalog.

- Business rule association

  Business rule association enables you to define access rules based on field values such as company, user role, gender, region, and other attributes. For example, you could define a rule that specifies that only users within a certain company can access the contents of a catalog. Just as in the case of product association rules, you can include more than one attribute and value pair in a single access rule. For example, you could define these two associations to limit access to users in Company A whose geographic region is the Southwest, or who work in Company B in the Northeast region:

  Condition 1: User = employee in Company A and Southwest.

  or

  Condition 2: User = employee in Company B and Northeast.

  Each condition in the rule involves an association between two values, a company and a region, which are joined together using the where clause operator *and*. However, the relationship between conditions is based on the where clause operator *or*, meaning that catalog access is granted to anyone who satisfies either condition 1 or condition 2.

  Note. The system interprets rule conditions that are defined on the same row or scroll to be joined by the *and* operator and conditions that are defined on different rows or scrolls to be joined by the *or* operator.

- Security Memberships

  Security Memberships enable you to specify which users or groups of users can have access to certain catalogs. For example, a company can have a Membership List called *All Persons*that includes all of the people that have a person record in the system. This Membership List is then associated with a catalog, this means that all of the people on this list can view this catalog. If a catalog called the Premier Catalog was for Premier Customers, a company can create a Membership List that contains all of their Premier Customers and the Premier Catalog would provide special pricing and recommendations for this group of users.

See Also

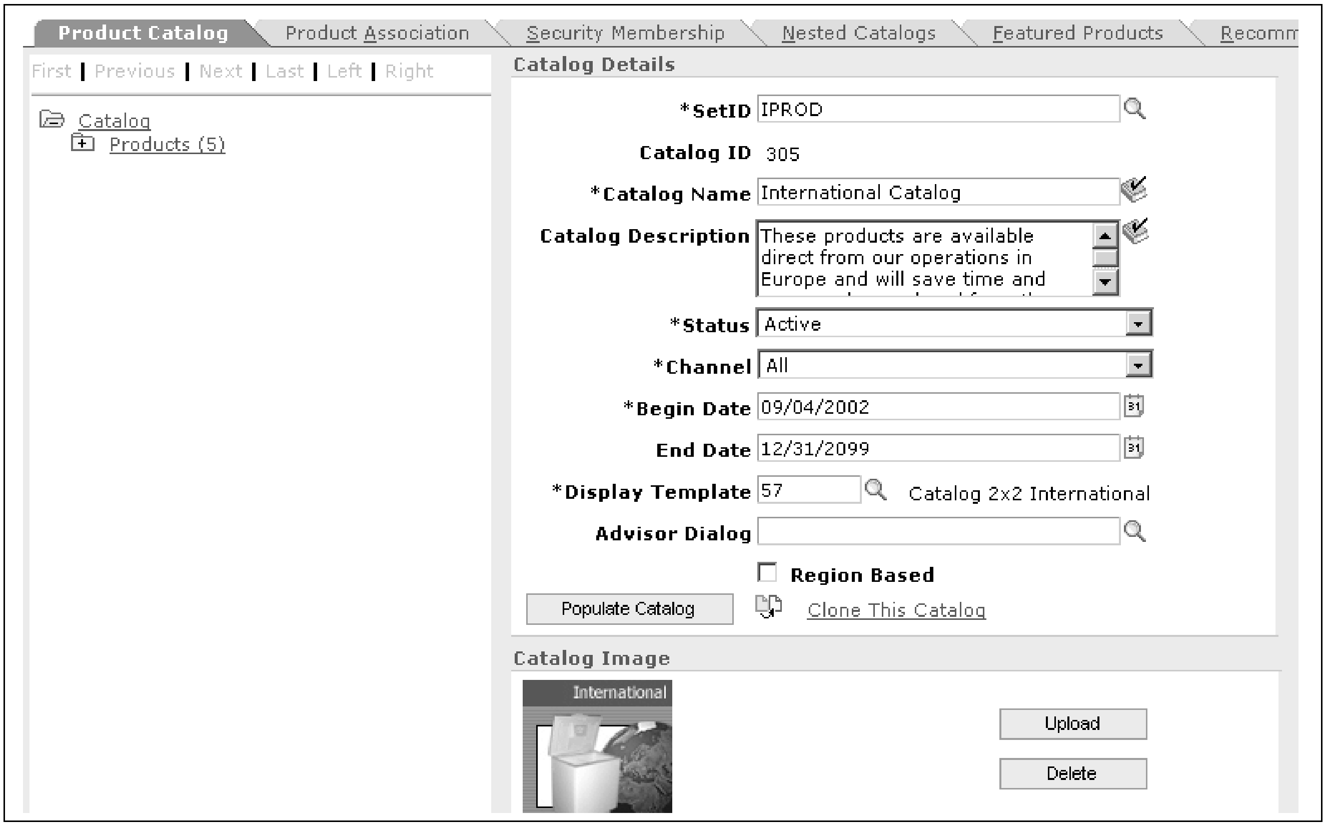
PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Setting Up PeopleSoft Customer Relationship Management Security and User Preferences”

Pages Used to Define Catalog Contents and Permissions

Page Name	Object Name	Navigation	Usage
Product Catalog	RO_PRD_CATALOG	Catalog Management CRM, Catalog Definition, Product Catalog	Define catalog IDs and select default display templates to control the look and feel of catalogs; populate catalog cache tables.
Clone a Catalog	RO_CAT_CLONE	Click the Clone This Catalog link on the Product Catalog page.	Create copies of catalogs.
Product Association	RO_PRD_ASSOCIATION	Catalog Management CRM, Catalog Definition, Product Association	Define catalog content by direct or business rule association.
Security Membership	RO_CAT_SEC	Catalog Management CRM, Catalog Definition, Security Membership	Define user access and experience by defining Membership Lists.
Membership List	RSEC_MEMBER_SMRY	Click the View Details link on the Security Membership page.	Define memberships to enable visibility to catalogs.
Nested Catalogs	RO_NEST_CAT	Catalog Management CRM, Catalog Definition, Nested Catalogs	Link nested catalogs to a main catalog.
Featured Products	RO_FEATURED_PRD	Catalog Management CRM, Catalog Definition, Featured Products	Select products to be featured in catalogs.
Recommendations	RO_RECOMMENDATION	Catalog Management CRM, Catalog Definition, Recommendation	Select to show or not show recommendations.

Defining Catalog IDs and Populating Catalog Caches

Access the Product Catalog page.



Product Catalog page

Catalog Tree Details

You can expand folders in the Catalog tree as follows:

- Expand the main Catalog folder in the catalog tree to display subfolders for products and users.
- Expand the Products folders to see individual products in the catalog.
- Expand the Users folder to see individual users who have access to the catalog.

Each folder in the tree has a link associated with it, and within the Products and Users folders are these links for individual products and users:

- Catalog

  Click to refresh the tree display.

- Products

  Click to access the Product Definition component and define products (logged on users must have access to the product definition to do this).

- Users

  Click to access the Consumer or Contact components where and define users (logged on users must have access to the user definition to do this).

- Individual product

  Click to access the product definition.

- Individual user

Click to access the user definition.

Catalog Details

Description and **Long Description**
Enter a description, which appears in the catalog list. You can make the long description appear on the catalog display page by selecting Show Long Description on the Display Template page.

Channel
Select which channels to use to define access to catalogs. Values are:

All: Select if the catalog will be accessed externally using the web as well as internally (for example, by CSRs).

Internal: Select if the catalog is for internal use only.

Web SS (web self-service): Select if the catalog is for external access using the web (for example, by customers who are purchasing products or services through a self-service transaction).

Note. The channel that is being accessed depends on the portal that is being browsed. As delivered, the customer portal is considered external, and the employee portal is considered internal.

Begin Date and **End Date**
Enter dates that specify the period during which the catalog is active.

Display Template
Enter a display template to control the layout of products as well as the information and options that appear in the catalog. You can override (on the User Associations page) the display template at the catalog level with a display template at the user level.

Note. You must first define the display templates using the Catalog Template Setup component.

Advisor Dialog
Associate a PeopleSoft Real-Time Advisor dialog with the catalog. When you associate a dialog with a catalog, users see a Goto Product Advisor link that launches the Advisor. Dialogs can be based on different catalog-user combinations, so that different dialogs can be targeted to different users. This means that you can define (on the User Associations page) a default dialog at the catalog level as well as an optional dialog at the user level.

Note. PeopleSoft Real-Time Advisor dialogs are a series of questions and answers that constitute a recommendation experience. Advisor recommends products based on a user's responses. These responses can be weighted by the Advisor engine to emphasize certain recommendations over others based on user segments. In PeopleSoft Order Capture Self Service, users can add products or services that Advisor recommends to their shopping carts. If users exit an Advisor dialog, they are returned either to the catalog page in the self-service application or to the Order Capture entry form (in the case of the CSR).

Region Based
Select if the catalog is regional (sensitive to the geographical area of the user). When users accesses regional catalogs, they are prompted for a region, which could be the zip code of the ship-to area of service or installation, a state, a city name, or some other location, depending on how you define regions

during implementation. This information can be used to dynamically hide products in the catalog that are not available in a particular area.

Note. To define the regions in which specific products are available or unavailable, use the Regions Page in the Product Definition component. Product Sales regions are used for product filtering.

Note. You can also attach regional restrictions at the user level as opposed to the product level. You do this on the User Association page. Geographic regions are used for user associations.

Universal Select if products in the catalog are available to all users who have access to the product setID.

Populate Catalog Click to populate cached information on which the tree in the left pane of the page is based.

Note. This button calls the RO_CAT_GETPR Application Engine program, which populates the cache tables storing catalog data.

Note. The tree refreshed automatically with the new information based on the catalog refresh.

Clone This Catalog Click to access the Clone a Catalog page and clone the current catalog.

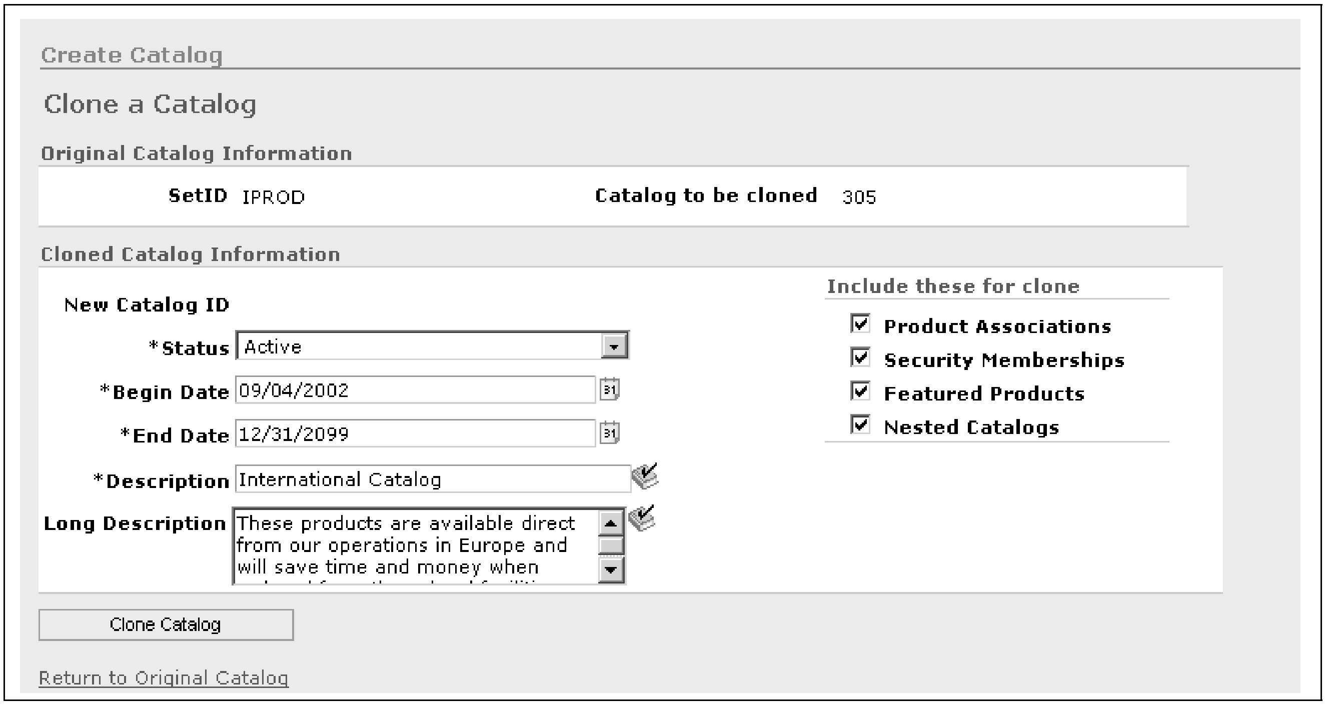
Catalog Image

Upload Click to upload an image to represent the catalog. You determine whether this image appears in online catalogs on the Display Template page.

Delete Click to delete the image.

Cloning Catalogs

Access the Clone a Catalog page.



Clone a Catalog Page

Original Catalog Information

Catalog to be Cloned — Displays the name of the catalog that is being cloned.

Cloned Catalog Information

New Catalog ID — Displays the new ID that the system assigns to the cloned catalog once you click Clone Catalog.

Begin Date and **End Date** — Enter dates that specify the period during which the new catalog is active.

Description and **Long Description** — Enter a description, which appears in the catalog list. You can make the long description appear on the catalog display page by selecting Show Long Description on the Display Template page.

Include these for clone

Product Associations — Select to save all of the product associations from the original catalog to the new catalog.

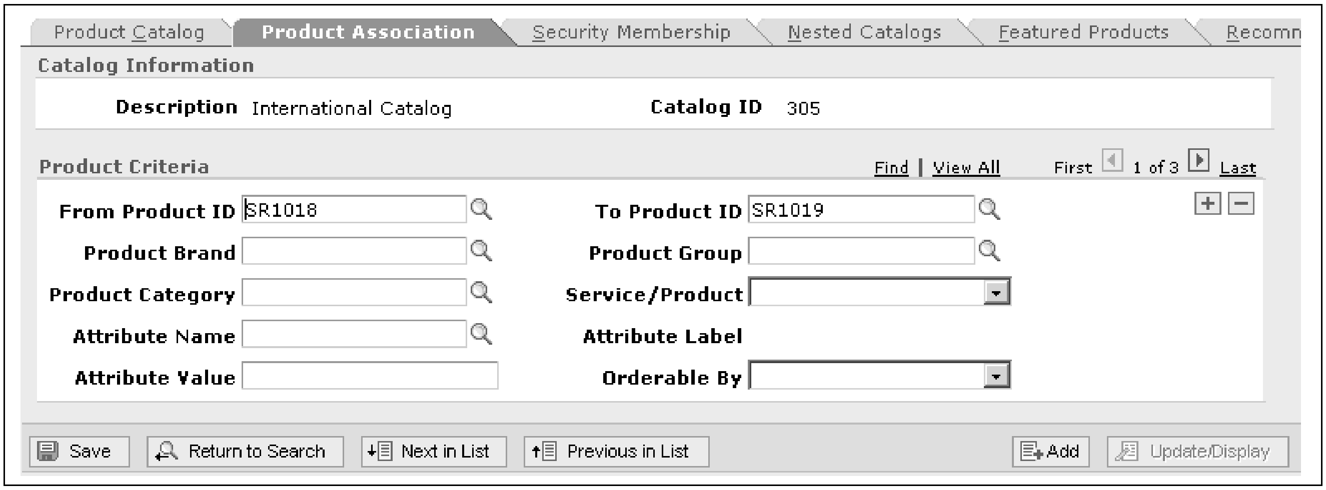
User Associations — Select to save all of the user associations from the original catalog to the new catalog.

Featured Products — Select to save all of the featured product rules from the original catalog to the new catalog.

Nested Catalogs — Select to save all of the nested catalogs from the original catalog to the new catalog.

Defining Product Associations

Access the Product Association page.



Product Association page

From Product ID and **To Product ID**

Enter product IDs to link products to catalogs by direct association. To link an individual product rather than a range of products to a catalog, enter the specific product ID in the From field and leave the To field blank. Create new rows for each product or product range that you want to associate with the catalog.

Product Brand

Enter a brand to create a business rule association based on that brand. For example, you could select only Brand A product for inclusion in a catalog.

Note. Define brands on the Product Brand page.

Product Group

Enter a product group to create a business rule association based on that group. For example, you could include in the catalog all products in the product group *Dishwashers.*

Note. Add products to product groups on the Product Groups page in the Product Definition component.

Product Category

Enter a product category to create a business rule association based on that category. For example, you could include in the catalog only products that fall within the category *Trains.*

Note. Define product categories on the Product Category page.

Attribute Name and **Attribute Value**

Enter an attribute name on which to base a business rule association, and enter the attribute value. For example, you could use the *Material* attribute to select items for inclusion in a catalog and specify that you want to include all products in the product group *Shoes* that are made of 100 percent leather (in this case, the attribute value would be *Leather*).

Note. Define attributes using the Attributes component. Only attributes that are associated with products whose group usage type is *Information* are available here.

Note. Associate products with attributes on the Attributes page in the Define Products component.

Attribute Label Displays the description of the chosen attribute.

Service/Product Enables you to create a business rule association based on the definition of products as *Service* or tangible type *Products.*

Note. Define products as service or tangible type products on the Definition page in the Product Definition component.

Orderable By Select a value to create a business rule association based on whether a product is universally available or available only to businesses or consumers. For example, you may want the catalog to include only products selected for businesses. Values are:

All: Select to include products in the catalog that are available to both customers and businesses.

Consumer: Select to include products in the catalog that are available to consumers.

Business: Select to include products in the catalog that are available to businesses.

Note. Set the Orderable By status of products on the Definition page in the Product Definition component.

Understanding Conditional Clauses in Business Rule Associations

When you create business rule associations on the Product Association page, the conditions in the rule can be related to one another in one of two ways:

- Using *and* operators.

  When different conditions are joined by *and* operators, all individual conditions in the rule must be met before a product can be included in a catalog. For example, if you specify that the product brand *Company X* should be included in the catalog and that within this brand, only products in the product category *Laptop Computers* should be included, you are defining a rule based on an *and* operator. In other words, the product must be both a Company X product and a laptop to be included in the catalog.

- Using *or* operators.

  When different conditions are joined by *or* operators, then only one condition in the rule must be met before a product is included in a catalog. For example, if you specify that any product carrying the product brand *Company X* should be included in the catalog, as well as any computer in the product category *Workstation* (regardless of brand) should be included, you are defining a rule based on an *or* operator. In other words, if the product is either a Company X product or a workstation, it will be included in the catalog (only one condition needs to be satisfied).

To create rules based on *and* and *or* operators:

1. To associate conditions within a rule using the *and* operator, define all the conditions as part of the same scroll or row.

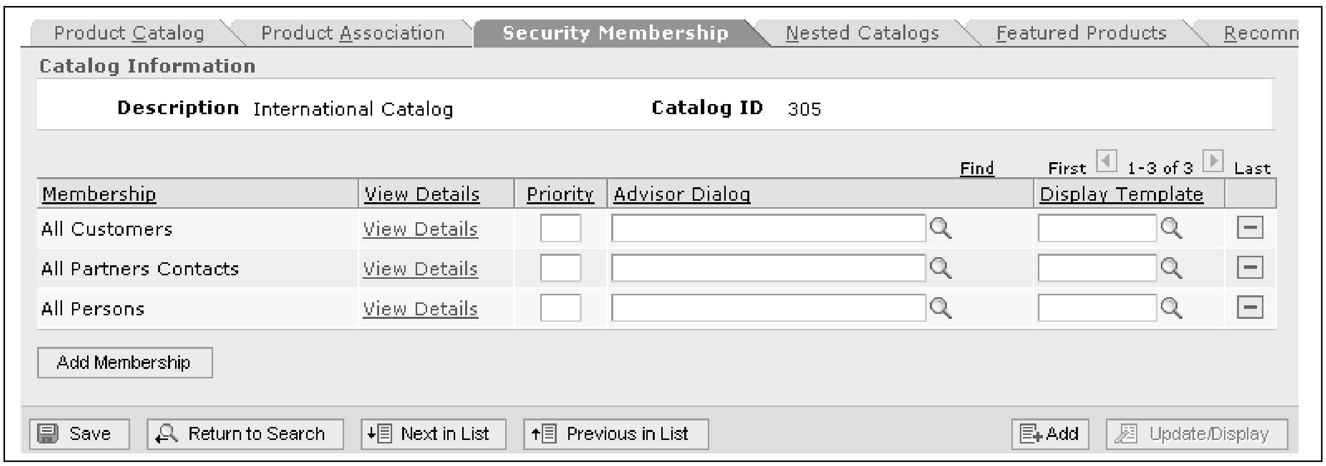
For example, assume that you want to include only Company X workstations in a catalog. To do this, enter a product brand of *Company X* (condition 1) and a product category of *Workstation* (condition 2), but do not create a new row for each condition.

2. To associate conditions using the *or* operator, define each condition on a different scroll or row.

   For example, assume that you want to include all Company X products in the catalog (condition 1), as well as any workstation, regardless of brand name (condition 2). To do this, enter a product brand of *Company X*, create a new row on the Product Association page (click the Add Row button), and define the second condition by enter a product category of *Workstation.*

Setting Up Security Memberships

Access the Security Membership page.



Security Membership page

Membership Membership Lists that are associated with a particular catalog.

View Details Select to view the membership details.

Priority Enter a Priority to define which catalog appears.

Advisor Dialog Enter a PeopleSoft Real-Time Advisor dialog to override the default dialog that is selected at the catalog level (on the Product Catalog page). This dialog applies to users who meet the access requirements that you define.

Note. Advisor dialogs belong to PeopleSoft Real-Time Advisor.

Display Template Enter a display template to override the default template that is selected at the catalog level (on the Product Catalog page). This template applies to users who meet the access requirements that you define.

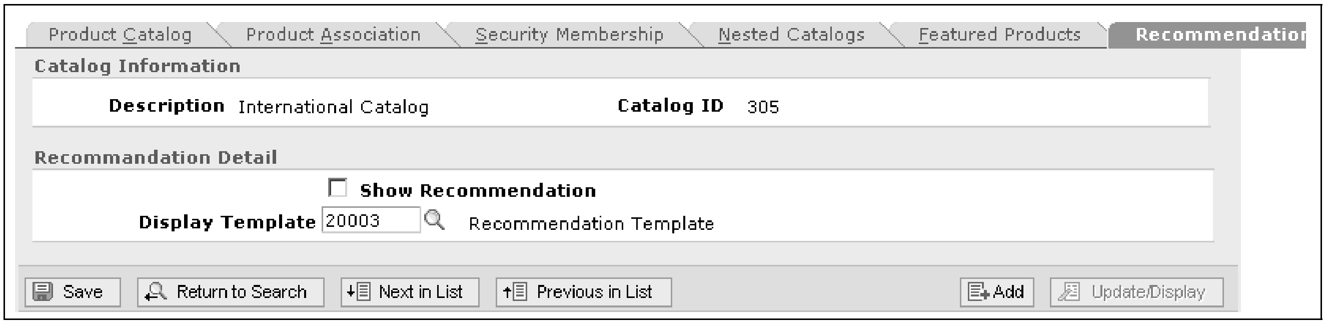
Add Membership Select to add a new membership to the catalog security.

See Also

PeopleSoft Enterprise CRM Real-Time Advisor 8.9 PeopleBook

Defining Recommendations

Access the Recommendation page.



Recommendation page

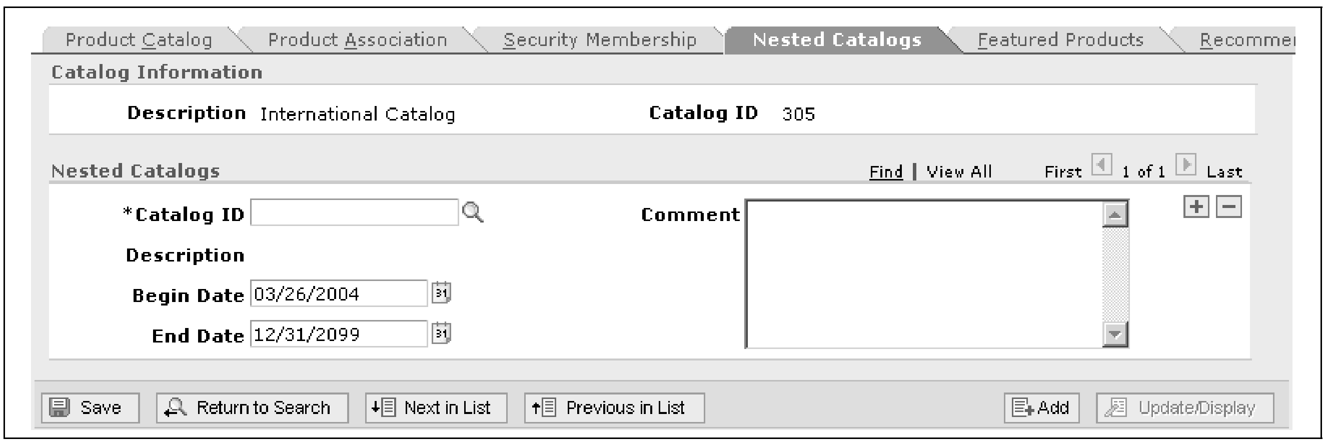
Recommendation Detail

Show Recommendation Select to show recommendations.

Display Template Define a display template to be used for recommendations.

Creating Nested Catalogs

Access the Nested Catalogs page.



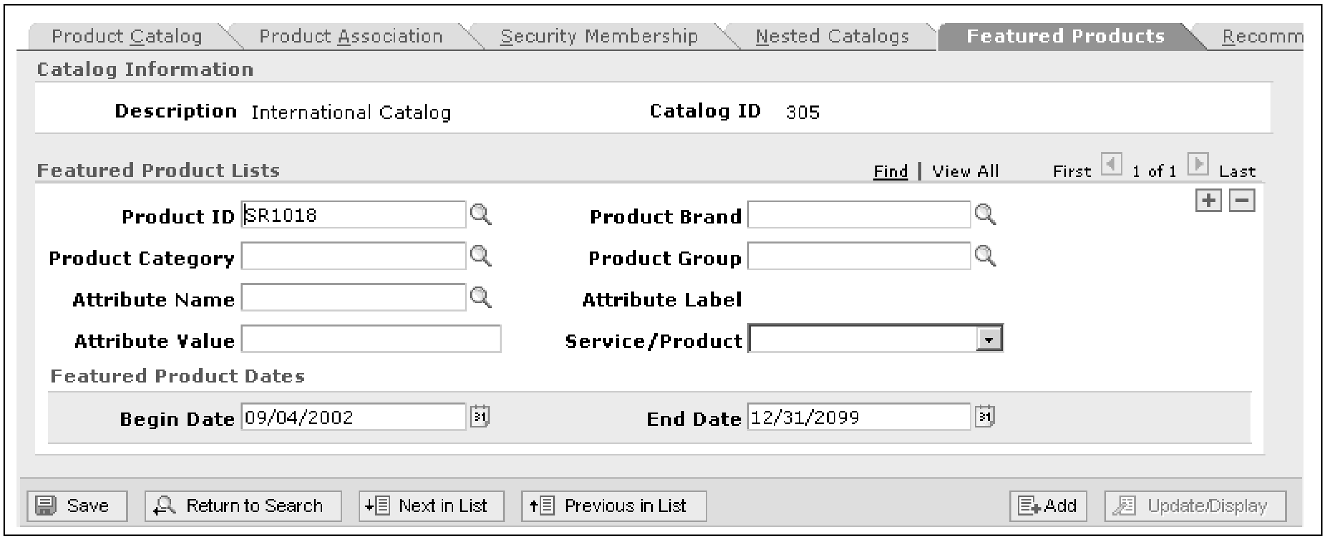
Nested Catalogs page

Catalog ID Enter the ID of the catalog that you want to nest within the main catalog that appears at the top of the page.

Begin Date and **End Date** Enter the dates in which the relationship between the nested catalog and the main catalog is valid.

Identifying Featured Products

Access the Featured Products page.



Featured Products page

Note. A product cannot be featured in a catalog until you associate it with the catalog on the Product Association page. Only after you establish the association can you mark the product as *Featured.*

Featured Product Lists

Product ID

Enter a product ID to define that individual product as a featured product. Create a new row for each product that you want to feature.

Product Brand

Enter a brand to create a business rule for featuring products based on that brand. For example, you could select all Nike products as featured products.

Note. Define brands on the Product Brand page.

Product Category

Enter a product category to create a business for featuring products based on that category.

Note. Define product categories on the Product Category page.

Product Group

Enter a product group to create a business rule for featuring products based on that group.

Note. Add products to product groups on the Product Groups page in the Product Definition component.

Attribute Name and **Attribute Value**

Enter an attribute name on which to base the business rule, and enter the attribute value. For example, *Material* is an attribute that you could use to define featured items; you could specify that you want to feature all products in the product group *Shoes* that are made of 100 percent leather (in this case, the attribute value would be *Leather*).

Note. Define attributes using the Attributes component. Only attributes that are associated with products whose group usage type is *Information* are available here.

Note. Associate products with attributes on the Attributes page in the Define Products component.

Attribute Label Displays the description of the chosen attribute.

Service/Product Enables you to define a business rule for featuring products based on the definition of products as *Service* or tangible type *Products.*

Note. Define products as service or tangible type products on the Definition page in the Product Definition component.

Searching Products

This section provides an overview of product searches and discusses how to search products.

Understanding Product Searches

You can initiate product searches and access product data from different locations in PeopleSoft CRM:

- Customer registry users can run searches by clicking the Find Product link.
- Employee registry users can launch a catalog search by navigating to PeopleSoft Order Capture, Find Products.

  Once in a catalog, users can access PeopleSoft Real-Time Advisor.
- Employee or customer users can personalize the PeopleSoft CRM portal by adding a product search pagelet to their home page (if the PeopleSoft Portal Pack is installed).
- In PeopleSoft Order Capture, CSRs can access product data and run catalog searches from the Entry form to obtain up-to-date information about products or services prior to entering an order or a quote.

  CSRs can copy products from the search results back to PeopleSoft Order Capture and use Real-Time Advisor to retrieve catalog data.
- In PeopleSoft Order Capture Self Service, you can link to product detail pages from order lines and access both catalogs and PeopleSoft Real-Time Advisor.
- From Lead and Opportunity components in PeopleSoft Sales, users can drill into Find Products and perform keyword searches for products.

  Users can then use the product comparison tool, drill into product details, and copy products from the search results back to PeopleSoft Sales.

Product Search Setup

PeopleSoft CRM uses the Verity search engine to run searches against flat files called *search collections.* These files store data that is derived from the same database cache tables that are loaded when you build and populate the catalog. Before you can search a catalog, you must:

1. Populate the catalog cache tables.
2. Create the search collection.

Search Results

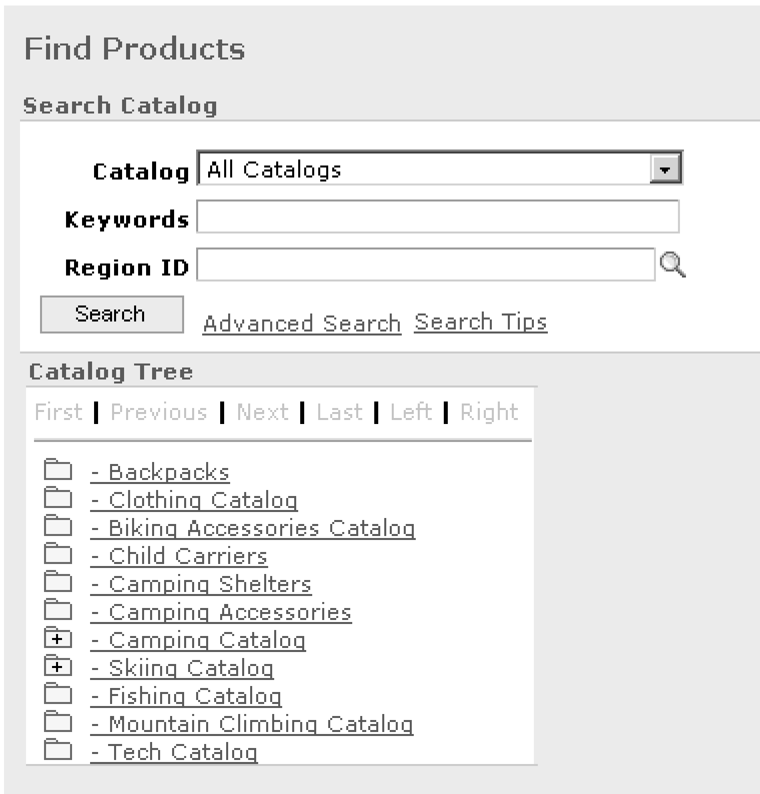
When search results are returned, the user can navigate into product details and compare up to three products. When used with the internal order capture, Lead and Opportunity components, users can select products and copy them back into the Calling component.

Page Used to Search Catalogs

Page Name	Object Name	Navigation	Usage
Find Products	RX_PROD_SRCH	Orders and Quotes, Find Products	Search products in one or more catalogs.

Searching Products

Access the Find Products page.



Find Products page

Basic Search

A basic search enables you to search catalogs based on selection criteria that you enter in the Catalog, Keywords, and Region ID fields.

Catalog Select the name of the specific catalog that you want to search, or select *All Catalogs* to run a global search.

Keywords

Enter the keyword or keywords to use in the search. The search looks only in the catalog that you select (or in all catalogs) and looks for keywords across all fields in the search collection.

Note. If you enter multiple keywords, the search treats these as an exact phrase. For example, if you enter *red bike*, the search would not find *blue bike with red trim*. If you want the search to treat multiple keywords independently, you must separate them with a boolean operator like *and* or *or*. For example, to find all occurrences of *red* and *bike*, enter *red and bike* in the Keywords field. Conversely, to find all occurrences of *red* or *bike*, enter *red or bike*.

Region ID

Select a Region ID to narrow the search criteria.

Search

Click the Search button to initiate a search.

Note. Pressing the Enter key after entering a keyword will not initiate the search.

Search Tips

Click to get tips on how to narrow or broaden the searches using the Keywords field, or to get tips on advanced searches.

Advanced Search

Advanced searches enable you to enter the same search criteria as in a basic search and more.

Description

Enter a keyword to search only the description field for this value.

Product ID

Enter a complete ID to search only the product ID field for this value.

Brand

Select a brand to search only the product brand field for this value.

Match On

Select the relationship between the elements of the advanced search. Values are:

All Criteria (AND): Select to relate advanced search criteria to one another using the *and* operator. In other words, all of the search criteria that you define (description, product ID, and brand) must be satisfied for the search to return a product.

Any Criterion (OR): Select to relate advanced search criteria to one another using the *or* operator. In other words, only one of the search criteria that you define (description, product ID, or brand) must be satisfied for the search to return a product.

Note. Match On options apply only to advanced search criteria. The elements of a basic search (catalog and keyword) are always linked together by an *and* operator. Similarly, the relationship between basic and advanced search elements is always based on the *and* operator.

Search

Click to initiate a search.

Note. Pressing Enter after entering a keyword does not initiate the search.

CHAPTER 9

Tracking Installed Products

The chapter provides an overview of installed products and discusses how to:

- Define creation and update rules for installed products.
- Configure installed product display options.
- Set up trees for installed products.
- Copy trees.
- Configure roles.
- Set up product registration.
- Manage installed products.
- View installed products.

Understanding Installed Products

This section discusses:

- How installed products are used.
- How installed products are created and updated.
- System-created service orders for installed products.
- Warranty activation on installed products.
- Hierarchical views of installed products.

How Installed Products Are Used

Installed products track the products (physical items or services) that are installed at a customer's site or issued to an internal worker. In PeopleSoft Support and PeopleSoft Integrated FieldService, you specify installed products in agreement lines to control the availability of these lines to the specific set of products. Installed products determine whether warranties are involved in the entitlement search when installed products are referenced on cases or service orders. Agents can reference installed products that are defined in PeopleSoft HelpDesk to determine what equipment is issued to an employee and the location of the equipment.

An agreement can also be an installed product. Agreements define the price of services or support offerings that are covered by the agreement, and the price of the agreement itself. You can define three types of agreements:

- Field service agreements specify what products in which customer sites are entitled to the service that is selected in each agreement line.

- Support agreements reference products on agreement lines. Similar to field service agreements, support agreements define customer sites that are entitled to support offerings.
- Help desk agreements represent an agreed upon level of service that an organization provides to its employees.

How Installed Products Are Created and Updated

You can manually create and maintain installed products for all products that are listed in the system using the Installed Products component. Use the Product Definition - Installed Product page to define rules that govern when installed products are automatically created and updated. You can configure the system to create installed products or update the status of installed products when:

- Orders are placed using PeopleSoft Order Capture or PeopleSoft Order Capture Self Service.
- The CRM system receives automatic shipping notification (ASN) messages from another system, such as PeopleSoft Order Management.
- Material usage and removal transactions are recorded using the Service Order component in PeopleSoft Integrated FieldService.

Note. The system automatically creates installed products with the status of *Installed* for products that are newly registered using the Product Registration component. For registered products that already have installed products, the system does not update the installed product status. Based on how the administrator configures the Product Registration page (for example, what fields are available and whether they are editable), users can update installed products as they complete the registration.

At the installation level of the system, you can define two sets of installed product creation and update rules that the system uses as default values for the Product Definition - Installed Product page: one set for those products that require a service order for installation and another set for those that do not. At the product definition level, however, you can have only one set of rules

When you set up these rules for installed products using the Product Definition component, you can click the Apply Defaults button on the Installed Product page to populate the appropriate default rules. While you can modify the default rules for specific products, you can also update the configurable default values (used across all products) on the Installed Product Defaults page under Set Up CRM, Install, Product Options.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Setting Up Customer Self-Service,” Setting Up Product Registration.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Working with Customer Self-Service Transactions,” Registering Products.

Rules for Installed Product Status

You can configure the system to set the status of installed products that it creates or updates to one of three values: *Pending*, *Installed*, or *Shipped* Typically, implementations suggest these rules, but you can configure them for your own business processes.

For a product that requires a service order for installation:

- When the installed product is created after submitting an order, set the status to *Pending*.

  If a subsequent ASN message is received, update the status to *Shipped*.
- When the installed product is created as a result of the receipt of an ASN message, set the status to *Shipped*.
- When a material usage transaction (recorded on the Order Materials component) results in a creation or update of the installed product, set the status to *Installed*.

For a product that does not require a service order for installation:

- When the installed product is created on order capture, set the status to *Pending.*

  If a subsequent ASN message is received, update the status to *Installed.*

- When the installed product is created as a result of the receipt of an ASN message, set the status to *Installed.*

Note. If a product does not require a service order for installation and a rule has been established for ASN receipt that sets the status to a value other than *Installed,* you must manually set the status of the installed product to *Installed* when appropriate.

You may want to set up rules that require manual intervention for business processes that require an action or response from a customer. For example, suppose that you ship a product that requires some type of installation, such as setting up a personal computer, that the customer performs. When the customer completes the installation process, he or she can contact you to update the record.

See Also

Chapter 7, "Setting Up Products," Managing Product Relationships, page 70

PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook, "Managing Orders and Quotes"

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, "Ordering and Receiving Materials"

PeopleSoft Enterprise Components PeopleBook

PeopleSoft Order Management 8.8 PeopleBook

System-Created Service Orders for Installed Products

When defining products using the Product Definition component, you can indicate whether an installed product requires a service order to complete installation. When a user places an order for the installed product in PeopleSoft Order Capture or Order Capture Self Service, component interfaces enable the system to stage a service order for the specified installation service in PeopleSoft Integrated FieldService.

When the status of the installed product or group of records that is associated with the ordered product is updated to *Shipped* (that is, when the ASN shows that the corresponding order line has been completely fulfilled), the system automatically generates a service order using the information that is defined for the specified installation service.

The initial status of the system-created service order is *Open,* with all associated service order activities set to *Open - Hold Assignment.*

If you enable automatic technician assignment and the system has successfully assigned a provider group and group member to the service order, the status of service order activities that are assigned with technicians is set to *Open - Assigned.*

When an order for multiple installed products that require installation is saved in PeopleSoft Order Capture or Order Capture Self Service, the system creates one service order for each product-site combination on the order.

See Also

PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook, "Working with PeopleSoft Order Capture Business Projects"

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

Warranty Activation on Installed Products

You can define or update warranties using the Warranties component under Customer Contracts CRM, Agreements. Associate an item with a warranty on the Item Definition page under the Items CRM, Inventory Item Definition.

When a user creates a case or service order for a customer's installed product, the system first checks for entitlements that are associated with a valid warranty on the customer's installed product before searching for entitlements on an agreement.

When you create an installed product using an item that is associated with a warranty, the system activates the associated warranty and calculates the warranty duration using information from both the warranty and installed product.

Note. The system can calculate the warranty duration for an installed product only if the appropriate process updated the base date that is used to calculate the warranty's start date.

For example, suppose that the warranty is defined to start upon shipment, but no ASN (shipment) status update rules are defined for the product. In this case, the installed product is created at order time, with an order date but no shipment date. The warranty is associated with the installed product at order time, but no warranty dates are populated.

In this scenario, a user must manually update the installed product's warranty start and end dates for the warranty information to appear in entitlement matches. However, if the product has ASN status update rules defined, the system automatically records the ship date and the warranty start and end dates on the installed product as soon as the ASN is processed for the product.

If necessary, you can manually update the warranty status and coverage period on the installed product using the Installed Products component.

See Also

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

Hierarchical Views of Installed Products

In PeopleSoft CRM, you can establish parent-child relationships between installed products and display them graphically from several points in the system. This functionality can be implemented to support a wide range of business needs, including the ability to view the associated parent assembly or subcomponents for a given installed product, view the geographic locations of specific network components, or view the components of a customer's service package.

Hierarchical Relationship Creation

You can manually define relationships between installed products using the Installed Products component. For a given installed product, you specify the installed product of the parent product to establish a parent-child relationship. When two installed products reference the same parent record the system creates sibling relationships.

The system automatically defines the relationships for installed products that are created when product packages are ordered in PeopleSoft Order Capture or Order Capture Self Service. The system automatically defines relationships for orders of static kits that originate in PeopleSoft Order Management.

For both package and static kit orders, the system creates installed products for each of the products in the package or static kit that are defined as installed products. If a product in a package or static kit is not defined as an installed product, the installed product hierarchy does not display that product.

For example, suppose that a parent product is defined as an installed product, the child product is not, and the grandchild product is. When the package is ordered, the system creates records for only the parent and grandchild rows and establishes a parent-child relationship between them.

How Hierarchical Relationships Are Viewed

Once you define the appropriate relationships, users can view them graphically in a tree format by accessing the Installed Product Viewable Hierarchy page. In PeopleSoft CRM, you can access this page from pages and page toolbars in these components:

- Installed Product
- Service Order
- My Service Order
- Support Case
- HelpDesk Case
- RMA (return material authorization) Form
- Site (under Customers CRM)
- Product Registration Installed Assets
- Search Installed Products and Services
- Search Installed Assets
- Customer 360 Degree View
- Worker 360 Degree View
- Order Capture Entry
- Self-Service Accounts
- Self-Service View Services
- Self-Service Support Case
- Self-Service HelpDesk Case

Note. For cases that you access from the corresponding Case components, the View Hierarchy button (which you click to access the Installed Product Viewable Hierarchy page) is not available if the business units to which they belong are associated with call center configuration templates that are set to hide installed product information.

The system filters the installed products that appear in the viewable hierarchy using the name of the customer or internal worker, site, account, product, serial number, asset tag, and department values that are available on the page from which you accessed the viewable hierarchy.

For example, if you access the viewable hierarchy from a page where customer and site fields have values, the system returns all of the installed products for the specified customer and site. If you access the viewable hierarchy from a page where the customer and product fields have values, the system displays all of the installed products for the specified customer and product.

This table summarizes what installed products are returned for specific field values:

Field Value on Source Page	Installed Products Returned
Site	All installed products for the specified customer or internal worker and site plus any related parent, sibling, or child installed products. **Note.** Not valid for PeopleSoft HelpDesk.
Serial number	Installed product for the serial number plus any related parent, sibling, or child installed products.
Product	All installed products for the specified customer or internal worker and product ID plus any related parent, sibling, or child installed products.
Department	All installed products that match the specified customer or internal worker and department plus any related parent, sibling, or child installed products.
Asset Tag	Installed product for the asset tag plus any related parent, sibling, or child installed products.
Account	All installed products that match the specified customer and account plus any related parent, sibling, or child installed products`

On the Installed Product Viewable Hierarchy page, the system lists the filter criteria values that are used to select which installed products to display. Initially, the system displays all records for all statuses. By default, the system also displays the immediate family relationships—parent, sibling, or child—for each installed product that is returned. You can modify the initial display to view records that match a specific status. You can also elect to filter the family relationships and view only those records that meet the filter criteria on the source page.

There are additional runtime filters, besides Status as mentioned above. Installed Product ID and Product are always shown, whereas the other filters are configurable using the Tree Set Up component.

These filters include:

- Installed Product ID
- Product
- Site
- Account
- Department
- Status

See Also

Chapter 7, "Setting Up Products," Managing Product Relationships, page 70

Defining Creation and Update Rules for Installed Products

To define creation and updates rules for installed products, use the Product Installation (PROD_INSTALLATION) component.

This section discusses how to:

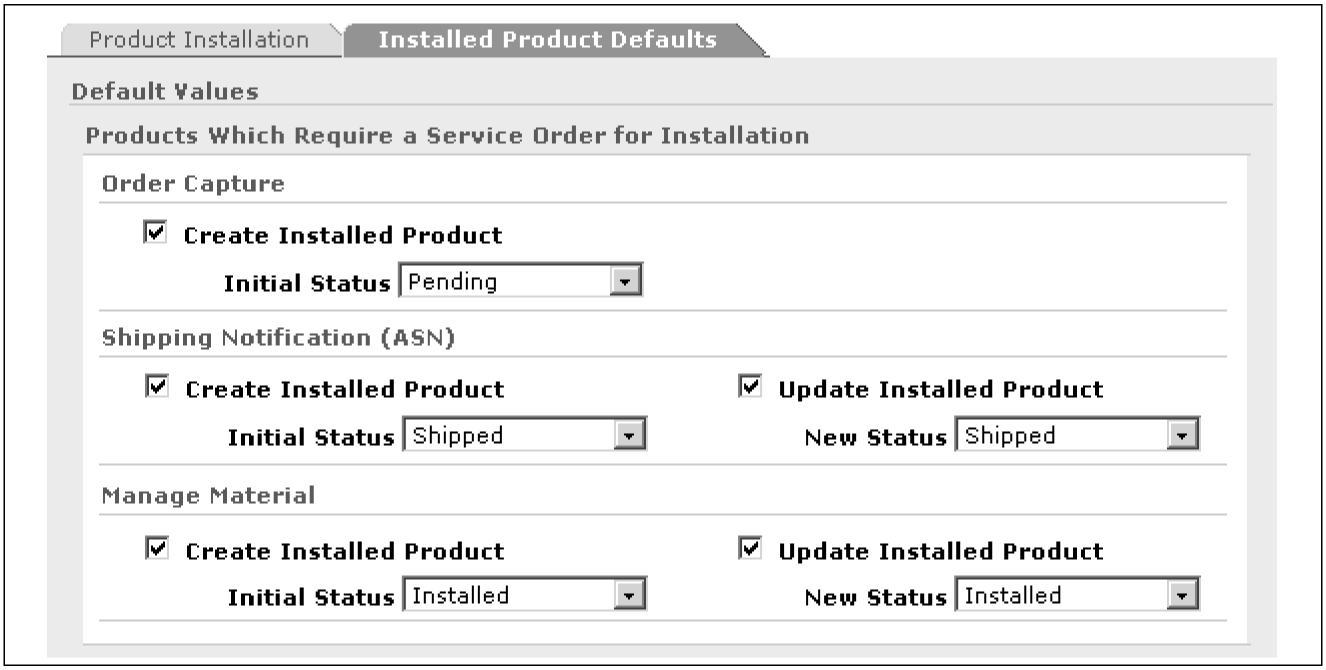
- Set up default installed product rules.
- Define installed product rules for a product.

Pages Used to Define Creation and Update Rules for Installed Products

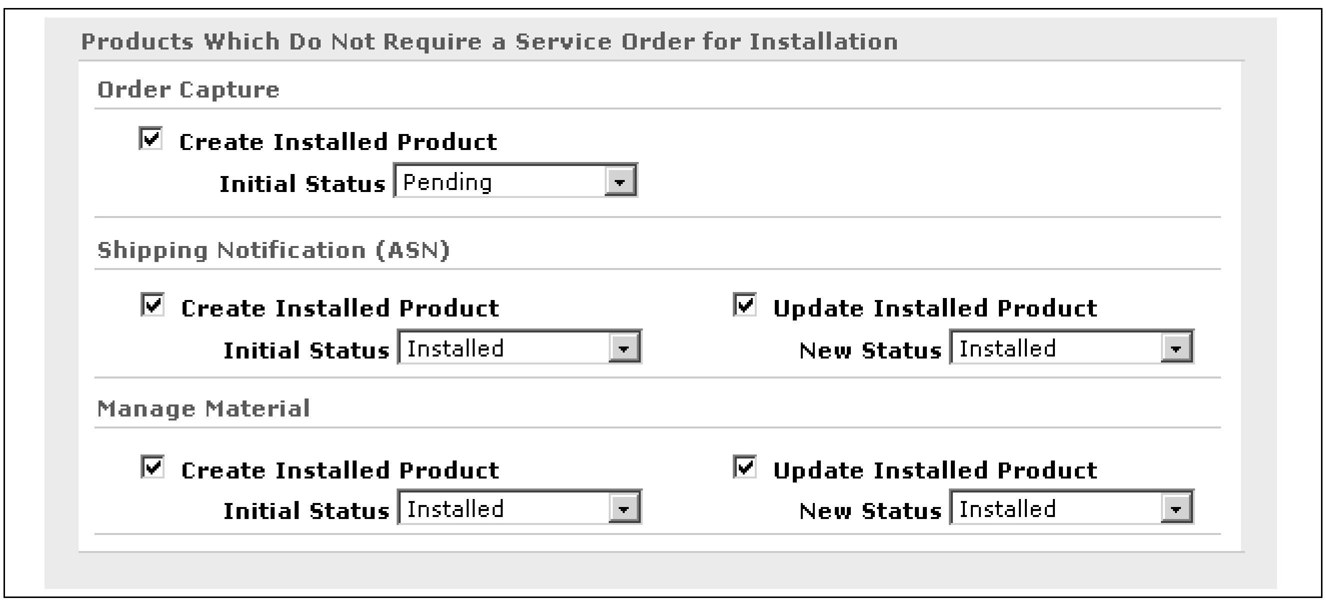
Page Name	Object Name	Navigation	Usage
Installed Product Defaults	RF_INSTPRD_DFLT	Set Up CRM, Install, Product Options, Installed Product Defaults	Specify default rule sets that determine how system transactions create and update installed products. On the Product Definition - Installed Product page, you can click a button to populate the appropriate default rule set and modify the rules for specific products, as necessary.
Product Definition - Installed Product	PROD_INSTALL	Products CRM, Product Definition, Installed Product	Specify rule sets that determine how system transactions create and update installed products for specified products.

Setting Up Default Installed Product Rules

Access the Installed Product Defaults page.



Installed Product Defaults page (1 of 2)



Installed Product Defaults page (2 of 2)

Products Which Require a Service Order for Installation

Order Capture

If you want the system to create installed products when an order for the product is saved in PeopleSoft Order Capture or Order Capture Self Service, select the *Create Installed Product* check box and then select an initial status of *Pending, Installed,* or *Shipped* for the installed product.

Shipping Notification (ASN)

If you want the system to create installed products when an ASN message for the order is received, select the *Create Installed Product* check box and then select the initial status of the installed product.

If the system should update existing installed products when an ASN message for the order is received, select the *Update Installed Product* check box and select the new status of the installed product.

You can select both check boxes with appropriate statuses to enable the rule sets for creating and updating installed products.

Note. For products that require a service order for installation, you cannot define rules that enable the installed product status to be set to *Installed* when an order is captured or an ASN is received.

Manage Material

If you want the system to create installed products when material usage and removal is recorded using the Order Materials component in PeopleSoft Integrated FieldService, select the *Create Installed Product* check box and then select the initial status of the installed product.

If the system should update existing installed products when material usage and removal is recorded using the Order Materials component, select the *Update Installed Product* check box and then select the new status of the installed product.

You can select both check boxes with appropriate statuses to enable the rule sets for creating and updating installed products.

Products Which Do Not Require a Service Order for Installation

Order Capture

If the product does not require a service order for installation, and the installed product is created when an order for the product is saved in PeopleSoft Order Capture or Order Capture Self Service, select the *Create Installed Product* check box and then select an initial status. PeopleSoft suggests that you set the initial status to *Pending.*

Shipping Notification (ASN)

If the system receives a subsequent ASN message for a product does not require a service order for installation, select the *Create Installed Product* check box and then select the initial status of *Installed.*

If the system should update existing installed products when an ASN message for the order is received for a product that does not require a service order for installation, select the *Update Installed Product* check box and then select a new status. PeopleSoft suggests that you set the new status to *Installed.*

You can select both check boxes with appropriate statuses to enable the rule sets for creating and updating installed products.

Note. If a product does not require a service order for installation and a rule has been established for ASN receipt that sets the status to a value other than Installed, you must manually set the status of the installed product to Installed when appropriate.

You may want to set up rules that require manual intervention for business processes that require an action or response from a customer.

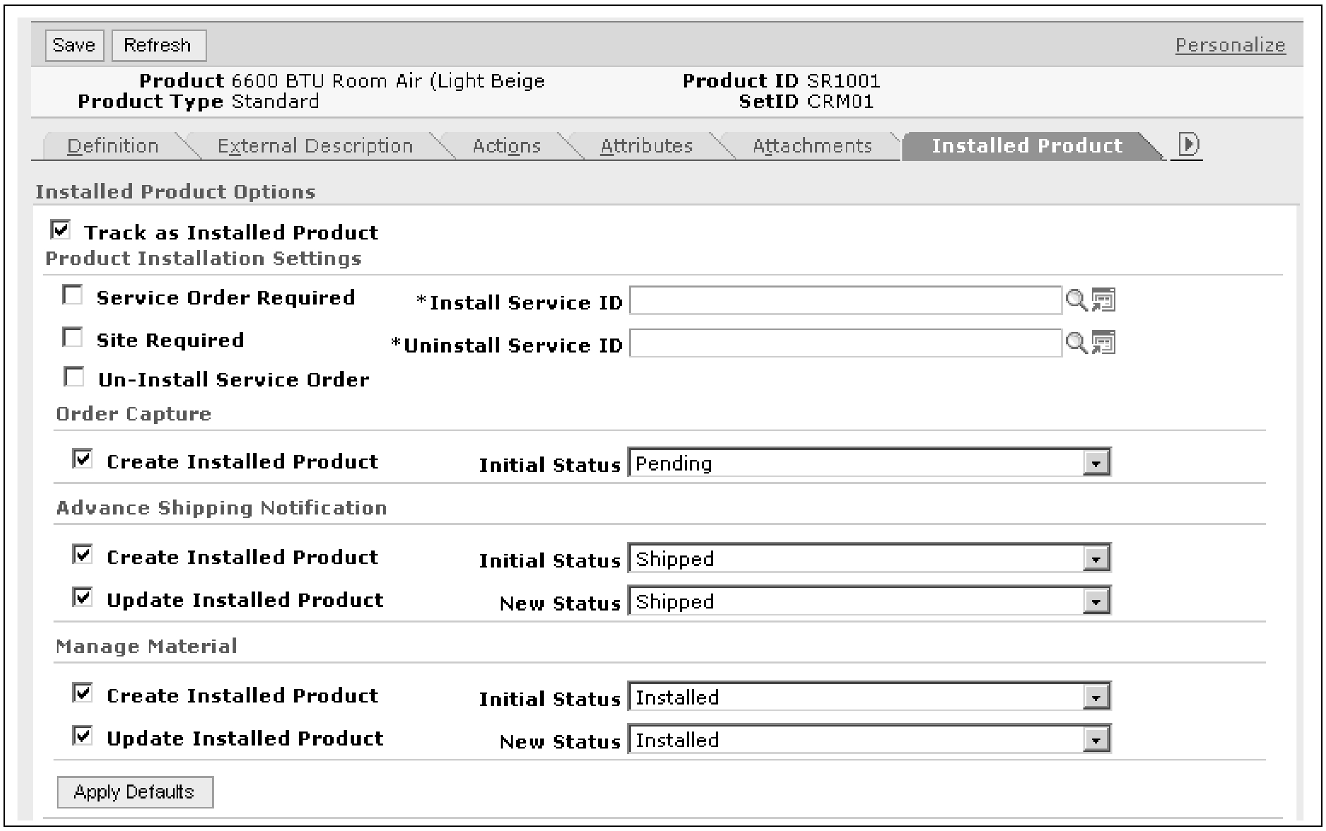
For example, suppose that you ship a product that requires some type of installation, such as setting up a personal computer, that the customer performs. When the customer completes the installation process, he or she can contact you to update the record.

Manage Material If the product does not require a service order when material usage and removal is recorded using the Order Materials component in PeopleSoft Integrated FieldService, select the *Create Installed Product* check box and then select the initial status of *Installed.*

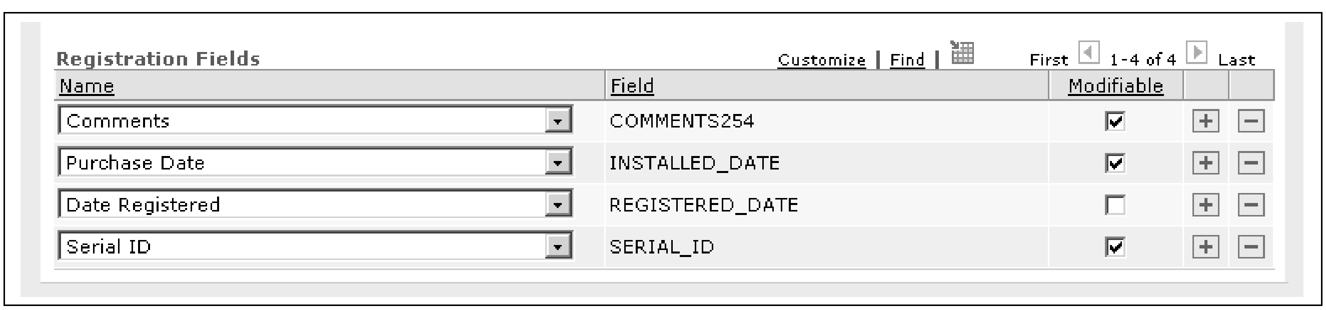
If the system should update existing installed products when material usage and removal is recorded using the Order Materials component in PeopleSoft Integrated FieldService for a product that does not require a service order for installation, select the *Update Installed Product* check box and then select a new status. PeopleSoft suggests that you set the new status to *Installed.*

Defining Installed Product Rules for a Product

Access the Product Definition - Installed Product page.



Product Definition - Installed Product page (1 of 2)



Product Definition - Installed Product page (2 of 2)

Track as Installed Product Select to enable installed products to be created automatically for the product.

Product Installation Settings

Service Order Required Select if a service order must be created for product installation.

Install Service ID Select the ID of the service that would be used to install the product. Define services using the Services component under Set Up CRM, Product Related, FieldService.

Note. If a site is required for the service you selected, the system automatically selects the Site Required check box. Also, if the same service is used to remove the product, the system automatically fills in the Uninstall Service ID field with the name of the service.

Site Required Select to require a customer site on orders that are created for the product in PeopleSoft Order Capture or Order Capture Self Service. If selected, users must select a site address for the install address on the Entry Form - Shipping page before they can save the order.

Uninstall Service ID Select the ID of the service that would be used to remove the product. Define services using the Services component under Set Up CRM, Product Related, FieldService.

Un-Install Service Order Select if a service order is required to remove the product.

Apply Defaults Click to populate the appropriate default rules that determine how system transactions create and update installed products. The system returns one of two default rule sets depending on whether the Service Order Required check box is selected or not. You can modify these rules as necessary for the specific product.

Default creation and update rules for installed products are defined on the Installed Product Defaults page under Set Up CRM, Install, Product Options.

Note. The fields in the Order Capture, Shipping Notification (ASN), and Manage Material group boxes are the same as those on the Installed Product Defaults page.

See Chapter 9, “Tracking Installed Products,” Defining Creation and Update Rules for Installed Products, page 107.

Registration Fields

Use the Registration Fields group box to define which of the installed product fields appear for users on the Product Registration - Product Registration Details page, where they register products.

The system populates this area with the default values that you define on the Product Registration Setup page. You can modify this registration field list as needed. The selection that you make on the Product Definition - Installed Product page is specific to the associated product only.

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, “Setting Up Customer Self-Service,” Configuring Installed Product Registration.

See Also

PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook, “Managing Orders and Quotes,” Entering Shipping, Payment, and Billing Information

Configuring Installed Product Display Options

To configure installed products, use the Installed Product Configuration (RF_IPRD_CONFIG) component.

This section discusses how to:

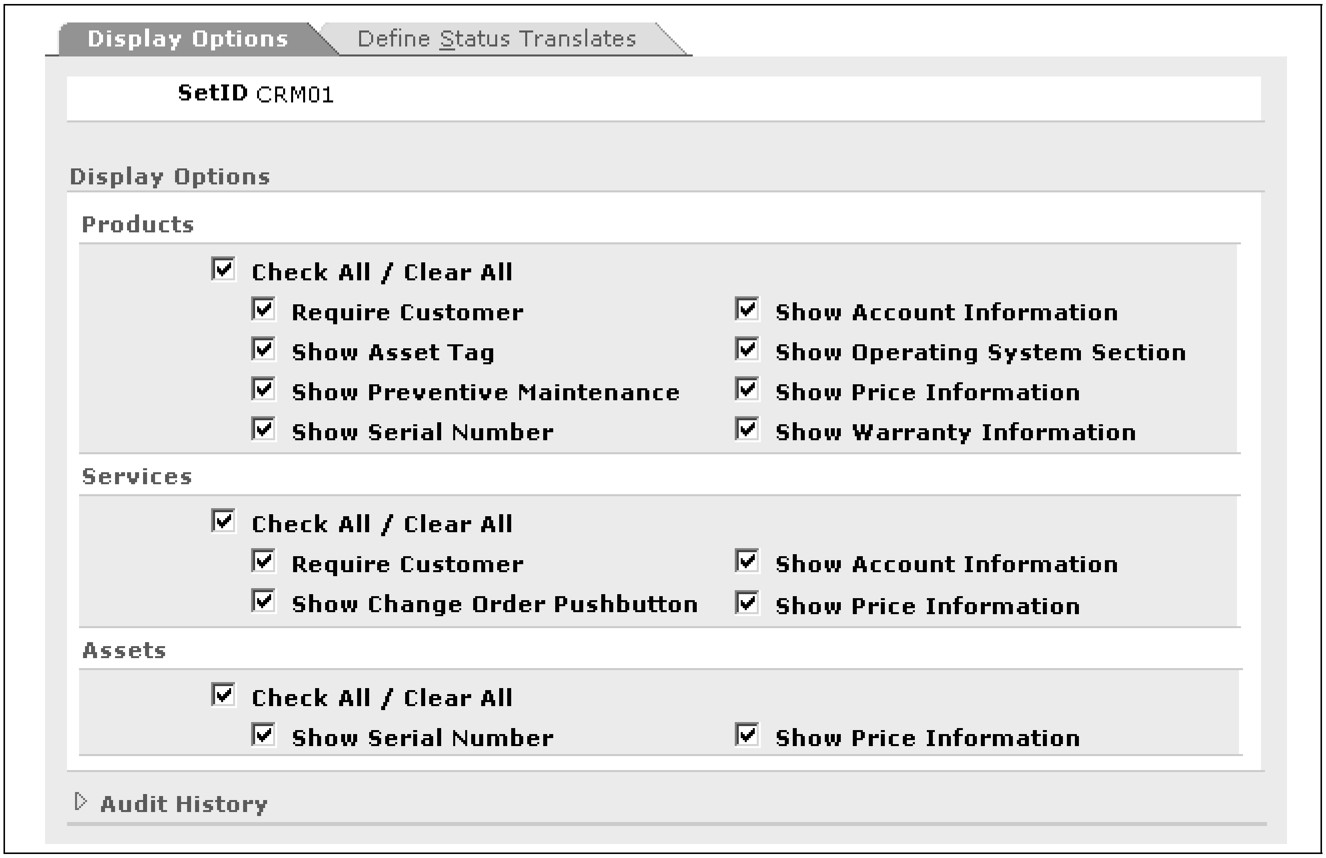
- Set up display options for installed products
- Define status translate values for installed products

Pages Used to Configure Installed Product Display Options

Page Name	Object Name	Navigation	Usage
Display Options	RF_IPRD_CONFIG	Set Up CRM, Product Related, Installed Product, Configuration, Display Options	Set up display options for installed products.
Define Status Translates	RF_IPRD_CONFIG_ST	Set Up CRM, Product Related, Installed Product, Configuration, Define Status Translates	Define status translate values for installed products.

Setting Up Display Options for Installed Products

Access the Display Options page.



Display Options page

Use this page to select the fields that you want the system to displayed on the Installed Product page when you are adding a new product, service or asset. This page is keyed by setID.

Note. If you do not have PeopleSoft HelpDesk installed, the system does not display the Assets group box

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Defining Status Translate Values for Installed Products

Access the Define Status Translates page.

Display Options | **Define Status Translates**

SetID CRM01

Product Status Translates Customize | Find | View All | First 1-11 of 11 Last

Field Value	Translate Long Name	Translate Short Name
DEF	Defective	Defective
INS	Installed	Installed
INT	In-Transit Return	In-Transit
INV	In Inventory	Inventory
IR	In Repair	In Repair
PND	Pending	Pending
SHP	Shipped	Shipped
SPA	Spare	Spare
UNI	Uninstalled	Uninstall
WD	Waiting Disposition	Wait Disp
WR	Waiting Repair	Repair

Define Status Translates page (1 of 2)

Service Status Translates Customize | Find | View All | First 1-3 of 3 Last

Field Value	Translate Long Name	Translate Short Name
CAN	Cancelled	Cancelled
INS	Active	Active
SUS	Suspended	Suspended

Asset Status Translates Customize | Find | View All | First 1-3 of 3 Last

Field Value	Translate Long Name	Translate Short Name
INS	Installed	Installed
PND	Pending Transfer	Pending
UNI	Uninstalled	Tossed

Agreement Status Translates Customize | Find | View All | First 1-3 of 3 Last

Field Value	Translate Long Name	Translate Short Name
CAN	Cancelled	Cancelled
INS	Active	Active
SUS	Suspended	Suspended

Define Status Translates page (2 of 2)

Use this page to define translate values for installed products, services, assets and agreements. Enter the field value for each type of product that you are using and then enter a long and short translate name.

Based upon the type of product you are installing, the system displays the values that you enter in the Translate Long Name field in the drop-down list box for the Status field on the Installed Product page.

Note. If you do not have PeopleSoft HelpDesk installed, the system does not display the Asset Status Translates group box

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Warning! If you are defining a new set of status translates, the following values should always be used (in addition to any optional statuses that you want to add): *INS* (Installed/Activated), *UNI* (Uninstalled/Deactivated), *SHP* (Shipped), and *PND* (Pending). PeopleSoft hardcodes these statuses throughout the system for certain scenarios.

Setting Up Trees for Installed Products

To set up trees for installed products, use the Installed Product Tree Setup (RF_IPRD_TREE_DEFN) component.

This section discusses how to:

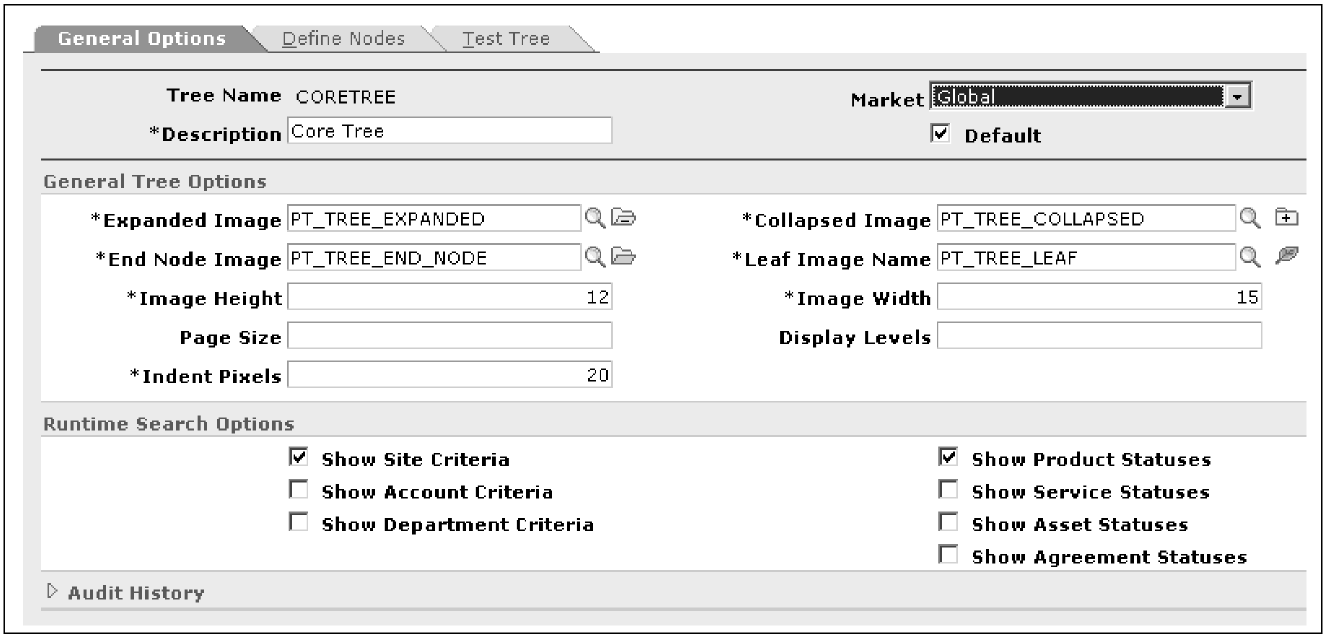
- Set up trees for installed products.
- Set up nodes for installed products.
- Test trees for installed products.

Pages Used to Set Up Trees for Installed Products

Page Name	Object Name	Navigation	Usage
General Options	RF_IPRD_TREE_DEFN	Set Up CRM, Product Related, Installed Product, Set Up Tree, General Options	Define the tree configuration (images to display in the tree, image size, page size, and date filter).
Define Nodes	RF_IPRD_TREE_NODE	Set Up CRM, Product Related, Installed Product, Set Up Tree, Define Nodes	Define the parent and child relationship of the tree nodes.
Test Tree	RF_IPRD_TREE_TEST	Set Up CRM, Product Related, Installed Product, Set Up Tree, Test Tree	Test the 360-Degree View tree to ensure that you configured it correctly.

Setting Up Trees for Installed Products

Access the General Options page.



General Options page

Tree Name
Displays the name for the tree for the installed product that you entered on the Add page. Use the de

Description
Enter a description of the tree you are adding.

Market
Select the market that will use the tree.

Default
Select to set this tree as the default tree that appears for this market on the Installed Product Hierarchy page if multiple tree exist.

General Tree Options

Use the fields in this group box to configure how the tree will look on the Installed Product Hierarchy page.

Expanded Image, Collapsed Image, End Node Image, and **Leaf Image Name**
Enter the images that you want the system to display on the tree. A representation of the image appears to the right of the field. The defaults are:

- Expanded Image: *PT_TREE_EXPANDED*
- Collapsed Image: *PT_TREE_COLLAPSED*
- End Node Image: *PT_TREE_END_NODE*
- Leaf Image Name: *PT_TREE_LEAF*

Image Height, and **Image Width**
Enter the size of the image that you want to appear on the tree. The default size is 12 by 15.

Page Size
Enter the page size for the tree. This is the size of the HTML area where the tree is displayed on the Installed Product Hierarchy page. To show the entire tree, enter zero (0).

Display Levels
Enter the maximum number of levels to display on the tree at any given time. To show all levels, enter zero (0).

Indent Pixels
Enter the number of pixels to indent each node. PeopleSoft recommends that you set this value to 20.

Runtime Search Options

When a user accesses the Installed Product Hierarchy page, the system displays the Product Name and Installed Product ID fields. To add additional search options to the page, select one or more of the check boxes that appear in this group box.

If you do not select any of the status check boxes, then the system hides the All and Single Status radio buttons and status drop-downs list boxes. If you select one or more status check boxes, the system combines the statuses when it prompts the user for a value.

Note. The system does not display the Show Department Criteria and Show Asset Statuses check boxes unless you have PeopleSoft HelpDesk installed

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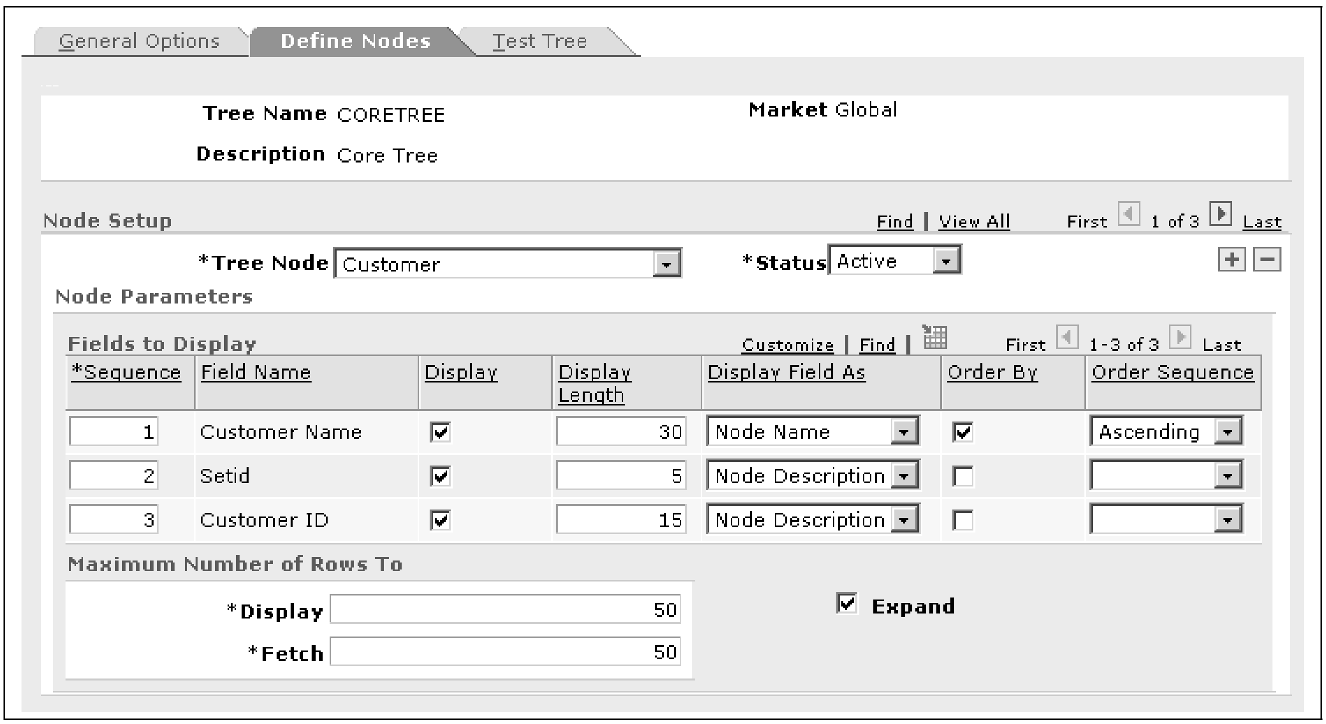
Setting Up Nodes for Installed Products

Access the Define Nodes page.



Define Nodes page

This page enables you to establish nodes for customer, site, account, contact, department, employee and installed product and children.

Node Setup

Tree Node

Select the type of node that you want to add to the tree. The system displays a list of fields associated with the node type in the Node Parameters - Fields to Display group box.

- *Account:* The system displays the Account ID (default) and Account Name fields.
- *Customer:* The system displays the Customer Name (default), Customer ID, and SetID fields.

- *Department:* The system displays the Description (default), Department ID, and SetID fields.
- *Employee:* The system displays the Employee Name (default) and Employee ID fields.
- *Site:* The system displays the Site Name (default), Site ID, and Address fields.
- *Installed Product and Children*The system displays the Installed Product ID (default), Product Description (default), Status, Serial ID, and Asset Tag fields.

Note. If there are multiple statuses for a single installed product, then the system displays *Multiple* on the tree.

Note. If PeopleSoft HelpDesk is not installed, then the system does not display the *Department* and *Employee* nodes in the Tree Node drop-down list. Also, if you establish nodes for *Customer, Site,* or *Account,* then the system does not permit you to establish nodes for either the *Department* or *Employee* nodes and vice versa

Status Select the tree node's status; either *Active* or *Inactive.* For the node to appear on the tree, the status must be active.

Node Parameters - Fields to Display

Use the fields in this group box to indicate how you want the fields to display for the node you selected.

Sequence Enter a number to indicate the order in which you want the fields to appear on the tree.

Display Select this check box for all the fields that you want the system to display for the node.

Display Length The system displays the number of characters that it can display for the field. The system can connect in a series one or more fields on any of the Display Field As options. Each option, however, has a maximum concatenated display length. For *Node Name* the maximum is 30 characters. For *Node Description* the maximum is 40 characters. For *Mouseover Text* the maximum is 100 characters.

Display Field As Select an option to indicate how you want the system to display the field name. You can choose either *Node Name*, *Node Description,* or *Mouseover Text.* If you select *Mouseover Text* the system displays the name of the field when a user moves their mouse over the node image whether it is a collapsed, expanded or leaf image.

Note. Nodes always display text as < Node Name> – <Node Description>. Thus, all Node Name fields should be sequenced prior to entering node descriptions. The system forces you to enter it in this sequence if you make a mistake.

Order By and **Order Sequence** Select this check box if you want the system to order the nodes in the tree in either ascending or descending order. If you select the Order

By check box for a field, then you must select either *Ascending* or *Descending* from the Order Sequence dorp-down list box. The sequence number determines the order in which the system orders the fields if you select the Order By check box for multiple fields.

Maximum Number of Rows To

Display and **Fetch**

Enter the maximum number of rows to display under the expanded node in the Installed Product Hierarchy. Then enter the maximum number of rows to fetch, or retrieve, from the database when the user clicks View All on the tree node.

Note. If you leave this field blank, the system retrieves 1000 rows. For the Installed Product and Children node, this value applies to the number of installed product records matching the search criteria, not the total installed product records in the entire family.

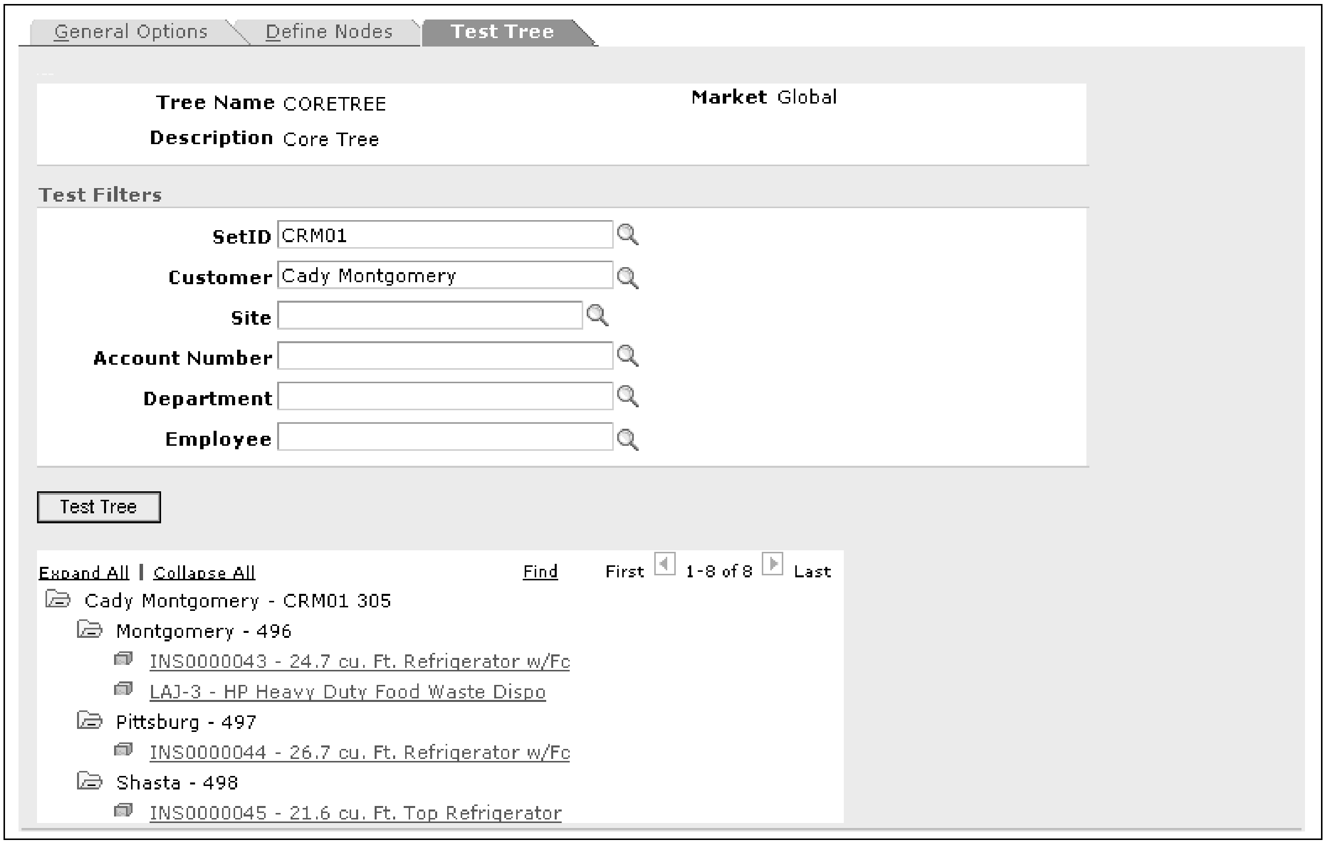
Expand

Select this check box if you want the system to automatically expand the node when a user access the tree. For all nodes other than the Installed Product and Children node, the system loads all parents and children despite the setting of this flag.

The system either collapses or expands each node as necessary based on the setting of this flag prior to display. For the Installed product and child nodes, however, the system loads the children upon demand if you do not select this check box for the node.

Testing Trees for Installed Products

Access the Test Tree page.



Test Tree page

To test a tree:

1. Enter data into at least two of the fields in the Test Filters group box (at the minimum one field must be SetID).
2. Click the Test Tree button.

The system verifies the tree configuration and displays that particular tree based on the criteria you entered. This is how the tree will appear on the Installed Product Hierarchy page.

Copying Trees

This section discusses how to copy a tree.

Page Used to Copy a Tree

Page Name	Object Name	Navigation	Usage
Copy Tree As	RF_IPRD_TREE_COPY	Set Up CRM, Product Related, Installed Product, Configure Roles	Copy an existing installed product tree setup to a new one.

Copying Trees

Access the Copy Tree As page.

Copy Tree As page

To copy an existing tree, select a tree from the Copy Tree search page and then enter the name of the new tree in the New Tree Name field. Click Save.

Note. If the *Copy From* tree was the default tree for the market, then the system will not select the default flag for the new tree.

Configuring Roles

To configure roles for installed products, use the Installed Product Tree Roles (RF_IPRD_TREE_ROLE) component.

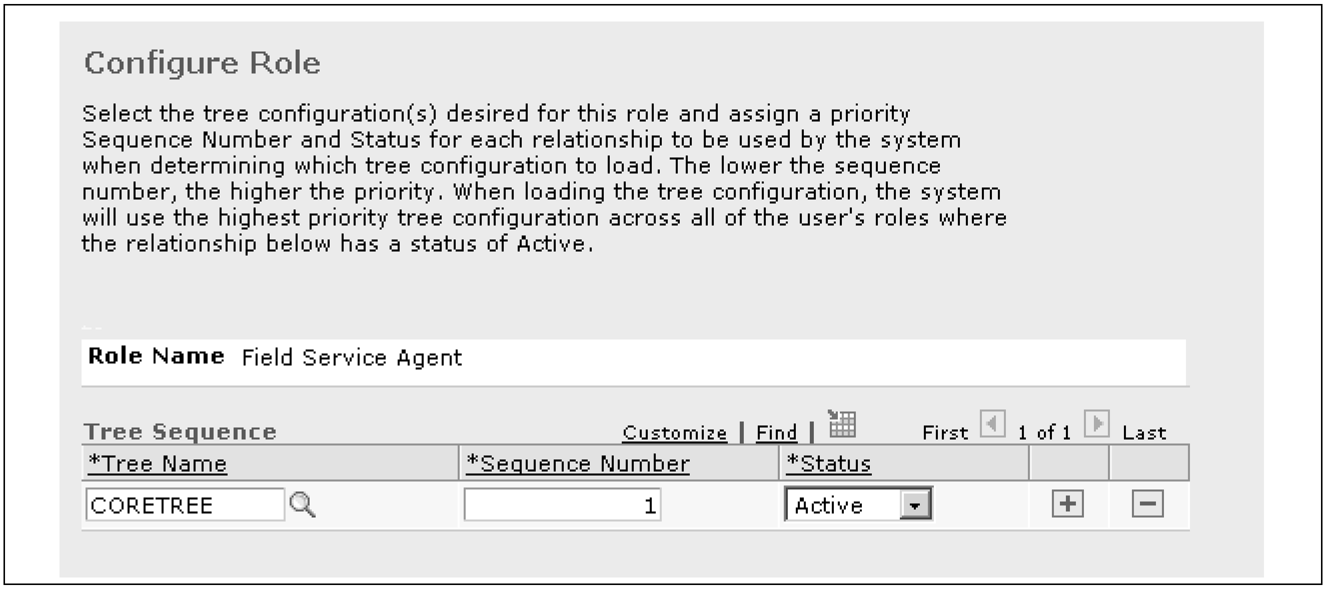
This section discusses how to configure roles for installed products.

Pages Used to Configure Roles

Page Name	Object Name	Navigation	Usage
Configure Role	RF_IPRD_TREE_ROLE	Set Up CRM, Product Related, Installed Product, Configure Roles	Assign and prioritize installed product tree setups to a role.

Configuring Roles for Installed Products

Access the Configure Role page.



Configure Role page

Use this page to associate a given role with a tree configuration. The system uses this information to determine which tree configuration to display when a user accesses the Installed Product Hierarchy page.

Enter a sequence number for the tree so the system knows what tree to display when the user has multiple roles. You can also use the Status field to activate and inactivate trees as needed.

These are the steps that the system follows when selecting a tree configuration to load:

1. Select he tree associated with the user’s role as specified on the Configure Roles page.

   If the user has multiple roles defined, the system selects the tree having the lowest sequence number across all user roles that is also active. If multiple roles have the same sequence number, or if none are found, the system skips ahead to step 2.

2. Select the tree associated with the user’s market that has the default flag selected.

   If market is not assigned to the user’s preferences, or if there is no default tree associated to the user’s market, the system skips ahead to step 3.

3. Select the tree associated with the global market that has the default flag selected.

   If none exists, the system skips ahead to step 4.

4. If there is no default tree for the global market, then the system creates a skeleton tree consisting of only the installed product and children node

Setting Up Product Registration

Use the Product Registration page to specify the statuses for installed products and services by setID. You can also use this page to define the installed product fields that appear on the Product Registration Details page and indicate which the fields are modifiable or read-only. For instructions on setting up the Product Registration page, refer to the PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook.

See Also

PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook, “Setting Up Customer Self-Service,” Setting Up Product Registration

Managing Installed Products

To manage installed products, use the Installed Product (RF_INST_PRODUCT) and Order Capture (RO_CAPTURE) components.

This section discusses how to:

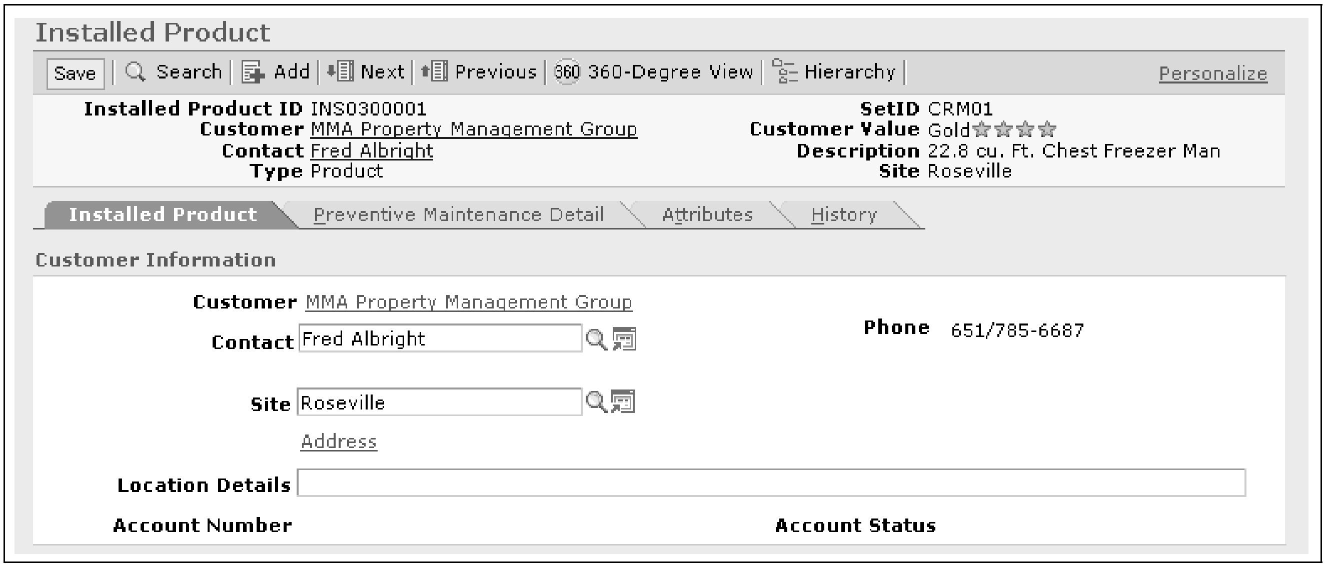
- Enter installed product information.
- View preventive maintenance details.
- Enter attributes.
- View information regarding events, audits, cases and service orders.

Pages Used to Manage Installed Products

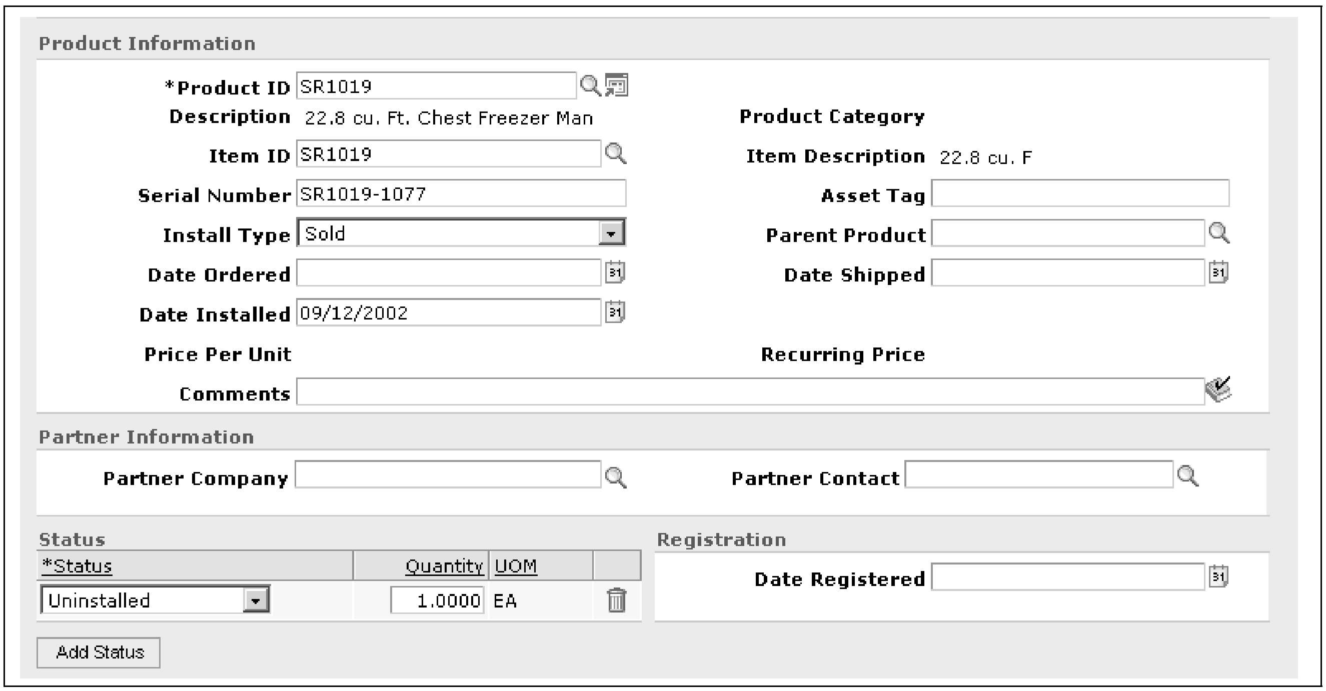
Page Name	Object Name	Navigation	Usage
Installed Product or Installed Assets	RF_INST_PRODUCT	• Installed Product and Service, Installed Product • HelpDesk, Installed Assets	Create or update installed products to track products (physical items or services) that are installed at customer sites or issued to internal workers.
Installed Product Address	RF_IPRD_ADDR	Click the Address link on the Installed Product page.	Add or update addresses for installed products.
Line Details	RO_CAPTURELINE_DTL	Click the View Configuration link on the Installed Product page.	View order and configuration information that the system captures at the time of order entry for installed products that are ordered through PeopleSoft Order Capture or Order Capture Self Service. **Note.** The View Configuration link is only visible when the installed product is configurable (either Calico-configured, or lite-package configured). The system hides the link if the product is not configured.
Preventive Maintenance Detail	RF_INST_PROD_PM	Installed Product and Service, Installed Product, Preventive Maintenance Detail	View or update pending PM entries, or review the history of PM entries for selected installed products.
Attributes	RB_ATTR_RUN_IPROD	Installed Product and Service, Installed Product, Attributes	Capture installed product data that is specific to business or industry requirements.
History	RF_INST_PROD_HIST	Installed Product and Service, Installed Product, History	View information regarding events, audits, cases and service orders that are associated with the installed product.

Entering Installed Product Information

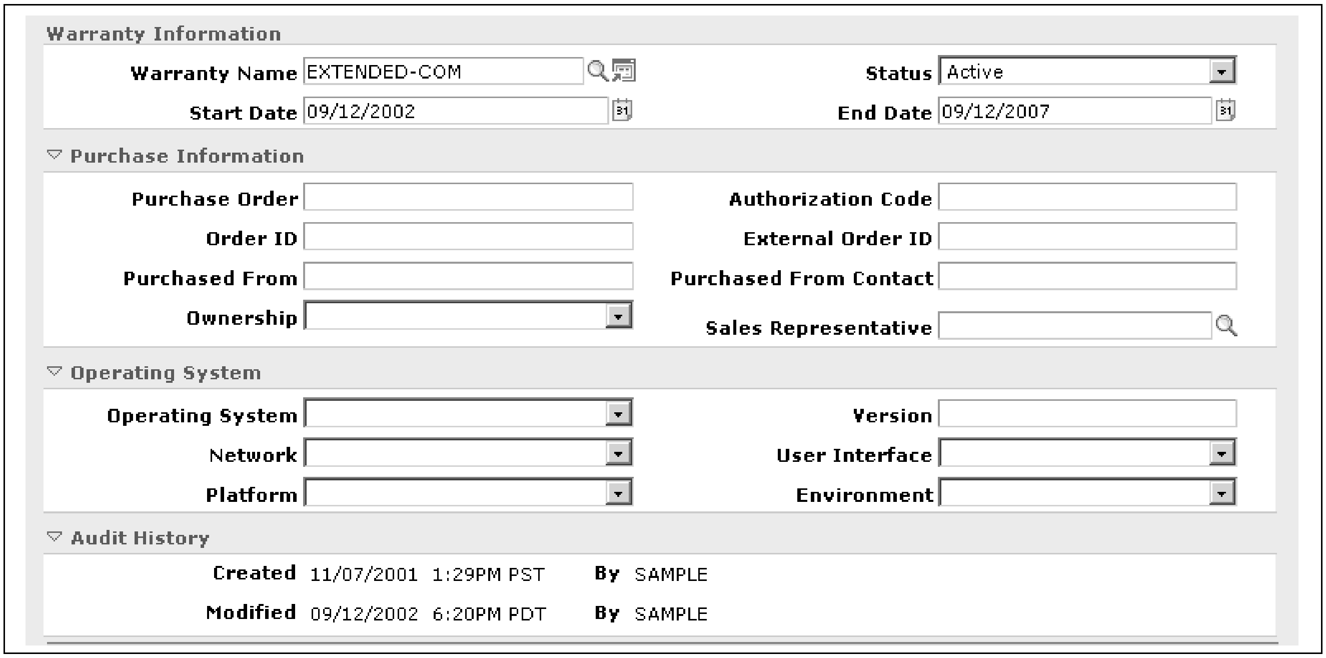
Access the Installed Product page.



Installed Product page (1 of 3)



Installed Product page (2 of 3)



Installed Product page (3 of 3)

Note. You can also add installed products from the 360-Degree View page.

Customer Information

Use the fields in this section to record information about the customer.

Note. For PeopleSoft HelpDesk, this section is labeled Administration Information. It includes many of the same field described below, including name, phone, department, and location.

Customer Enter the customer who owns or leases the installed product. A customer can be a company, contact or consumer. Establish customers using the Customer enterprise integration point (EIP) or the Company or Consumer component under Customers CRM. Click the Transfer to Customer button to access the record of the selected customer.

Site Enter a site of the customer where the installed product is located. You set up sites for customers using the Company, Consumer, or Site component under Customers CRM. Click the Transfer to Site button to access the Site component.

Address Click to access the Installed Product Address page and enter an address for the installed product. If you are entering asset information, the CRM system populates this field with the primary address of the worker or contact you select in the Name field. If you are entering a product or service, the system enters the site address of the customer or contact.

Name Enter a contact of the customer site or worker to whom the installed product is given or issued. If you don’t enter a customer, the system displays workers (employees) and contacts who are defined in the CRM system. Set up workers under Workforce, Worker. Establish contacts under Customer CRM, Contact (or Company, or Site). Click the Transfer to Contact/Worker button to access the record of the selected person.

Department
Enter the department that is associated with the internal worker to whom the installed product is issued. Set up departments under Set Up CRM, Common Definitions, Employee Data, Department, Department.

Location
Displays the location code of the selected worker.

Location Details
Enter notes about the specific area within the worker's internal location or the customer's site where the installed product is located.

Account Number and **Account Status**
Displays the customers account number and status if there is one on record.

Product Information

Use the fields in this group box to enter product information.

Note. If you are using this page to add a service, the system does not display the Item ID, Item Description, Serial Number, Date Shipped, and Date Installed fields.

For PeopleSoft HelpDesk, this section is labeled Asset Information. It includes most of the same field described below.

Product ID
Enter the ID of the product that is installed at the customer site or worker's internal location. Establish products using the Product EIP or the Product Definition component. If the product is associated with an item, the system populates the item ID as well.

Under certain circumstances, the system displays a link next to the Product ID field. This link transfers users to the Service Management page in Order Capture to create a new order for the service. The system prepopulates the customer and product information. For the link to appear, the following must be true:

- The Installed product must be a service or an agreement.
- The option to show the button must be selected in the configuration.
- The installed product cannot have a parent installed product
- The user must have authorization to create a new service management order.
- If entering an installed service (not an agreement), the product ID associated with the installed service must either have the Service Required flag selected, or it must be a service-type product that is not a service feature.
- Energy services are prohibited from using this link because the type of service management order cannot be determined automatically (start, stop or transfer service). Thus, the link is hidden for energy services.

Note. This link also appears as a button on the Installed Product Hierarchy.

View Configuration
Click to access the Line Details page of the order from which the installed product was created and view the product's configuration details.

Note. Configuration details are available only for configured products that are ordered through PeopleSoft Order Capture or Order Capture Self Service. This link is only visible if the installed product is configured.

Item ID Enter the ID of the item that is installed at the customer site. Establish items using the Item Master EIP or the Item Definition component.

Serial Number Enter the serial number if the item is serial-controlled.

Asset Tag Enter the asset tag that is available if the item is issued an internal worker.

Install Type Select the reason why the product was installed at the customer site (for informational purposes only). Values are *Beta, Demo, Evaluation, Loan,* and *Sold.*

Parent Product Enter another installed product to define as the parent of this installed product. View parent, child, and sibling relationships between installed products on the Installed Product Viewable Hierarchy page.

Date Ordered, Date Shipped, and **Date Installed** Enter dates if you are creating or updating installed products manually. The system populates these fields, as applicable for the given transaction, when it creates or updates installed products.

Price Per Unit Displays the price of the product per unit and the

Recurring Price Displays the recurring for the product or service if there is one on record.

Service Information

If the installed product is configured as a service rather than a product, this group box appears instead of the Product Information group box. Many of the same fields appear in both group boxes with the exception of the Start Date field, End Date field, and Create Order link which only appear in the Service Information group box.

Create Order Click this link to go to the Manage Service - Entry Form page in PeopleSoft Order Capture. Use this page to create a new order or quote by entering order details and adding products to the order lines.

Partner Information

Use the fields in this group box to select a partner company and contacts that is associated with the sale or installation of the installed product.

Note. The system hides partner information if you are entering an asset

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Status

Status Select the current status of the installed product. Delivered values include *Installed/Activated, Uninstalled/Deactivated,Shipped,* and *Pending.*The installed product status can be set manually or by system transactions.

Using the Define Status Translates page of the Installed Product Configuration component, you can set up a new set of status values as appropriate for the Installed Products component by setID when it is used in another industry.

For example, in PeopleSoft Support, where the Installed Service component (cloned from the Installed Products component) is used, you (as an implementer) can change the statuses to *Activated, Disconnected, Suspended, Resume,* and so on to better fit your business needs.

Quantity

Enter the quantity (in the standard unit of measure) of the installed product in the indicated status. If the item is serial-controlled, the quantity is set to *1* by default.

You must enter a nonzero value for each row of status before saving the installed product. Multiple rows appear for partial shipments of an installed product order to indicate the status for each quantity.

You can add rows manually as necessary to indicate the quantity of an installed product in repair, uninstalled, and so forth.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, "Configuring Field Values," Modifying Industry-Specific Translate Values.

Registration

Date Registered

Enter the date when the product is registered and the installed product is created or updated. If this installed product is registered using the Product Registration component, this field displays the date when the registration is submitted.

Warranty Information

Only one warranty can be associated with an installed product.

Note. If you are using this page to add a service, the system does not display this group box.

Warranty Name

Enter the warranty that is associated with the item. Click the Transfer to Warranty button to access the component you use to define warranties.

Status

Select the current status of the warranty for the installed product, either *Active* or *Inactive*. For entitlement searches from cases or service orders that reference an installed product, the system first checks for an active warranty that is valid for the current date.

Start Date and **End Date**

Enter the dates when the warranty period begins and ends for the installed product. The system populates start date automatically using the install, ship, or order date for the installed product, depending on the start date option that the warranty definition specifies. The default end date is based on the length that the associated warranty definition specifies.

Purchase Information

Purchase Order

Enter the customer's purchase order number for the installed product

Authorization Code

Enter the authorization code that the credit card company provides, if applicable.

Order ID

Enter the order identification number for the installed product.

External Order ID

Enter the customer's order identification number for the installed product, if there is one.

Purchased From

Enter the name of the customer the installed product is purchased from.

Purchased From Contact

Enter the name of the contact the installed product is purchased from.

Ownership Select whether the customer owns the installed product or possesses it under the terms of a lease or rental agreement.

Sales Representative Enter the name of the sales representative who is associated with the order for the installed product. If your installation includes PeopleSoft Sales, the system prompt for this field lists the people who are defined as sales force representatives in the system; however, you can enter the name of any worker.

Operating System

The fields in this group box are relevant to installed computers, computer software, and computer accessories, and are for information purposes only. Enter or select the information from the fields that appear in this group box.

Note. If you are using this page to add a service, the system does not display this group box.

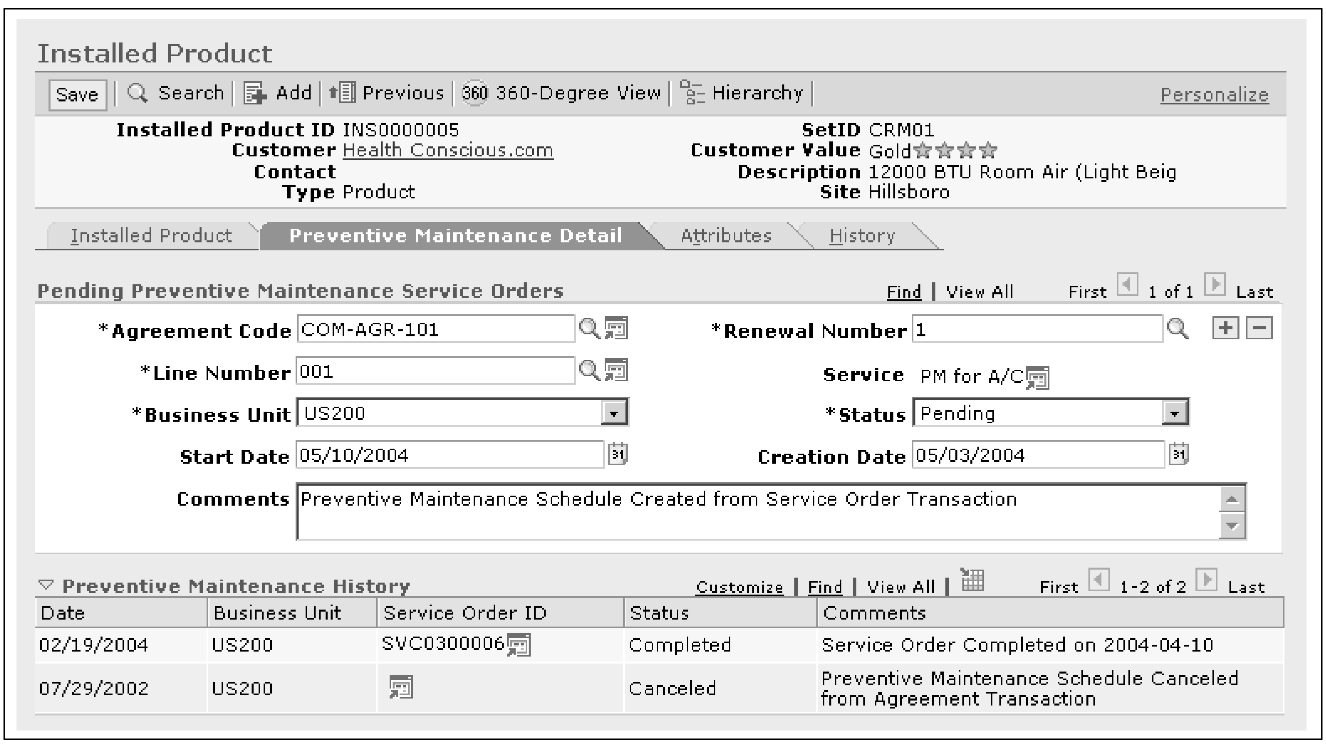
See Also

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, "Creating and Managing Service Orders," Service Order Toolbar Functions

Viewing Preventative Maintenance Details

Access the Preventive Maintenance Detail page.

Note. If you are adding a service or asset, the system does not display this page.



Preventive Maintenance Detail page

Use this page to view the preventive maintenance history of the installed product. You can also preview and update information about the upcoming preventive maintenance service using the agreement code, renewal number, line number, business unit, status start date and creation date.

See *PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook*, “Working with Scheduled Preventive Maintenance,” Managing Scheduled Preventive Maintenance.

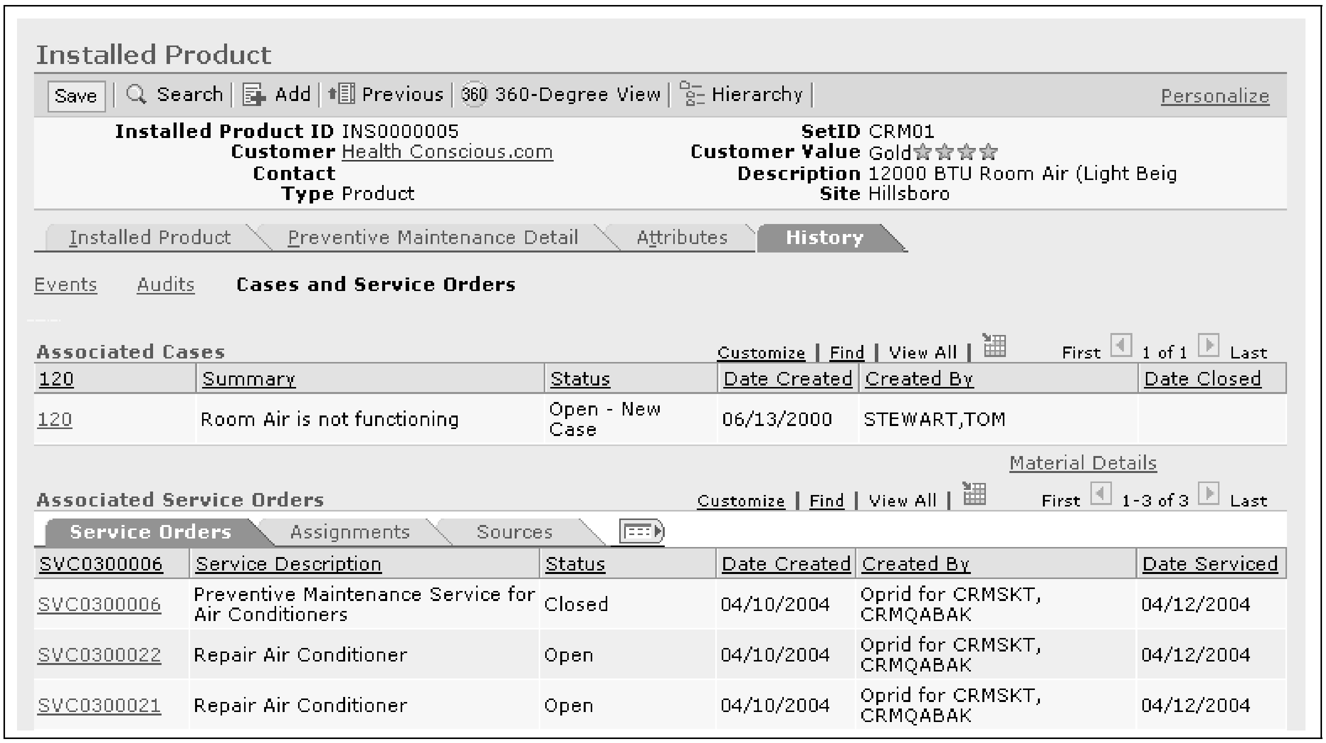
Entering Attributes

Access the Attributes page.

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

Viewing Information Regarding Events, Audits, Cases and Service Orders

Access the History page.



History page

Events Link

Click the Events link to view events that are associated with the installed product. To filter events that appear in the grid enter dates in the From Date and To Date fields and then click Refresh.

The system displays these events out of the box:

- A high level view of each service activity, which includes new orders as well as change orders (for services only).
- The status of business projects, including links back to the Business Project status page (for services only).
- Installed product creation dates and the people who created the installed products.
- Changes in status, showing the old and new values
- Changes in the parent installed product ID, showing old and new values

- Employee and department transfers, including old and new values (for assets only).
- Changes in the configuration code, showing the old and new values (for Calico-configured products only), including links to display the old and new configuration.

If you want to configure additional events to appear in the Events group box, use AAF (Active Analytics Framework).

See *PeopleSoft Enterprise Components for CRM 8.9 PeopleBook*

Audits Link

Click the Audits link to display changes to the records and fields that are associated with the installed product. The system displays previous and new values for the fields that have changed. The system displays all fields from both the installed product main record as well as the installed product status record.

Note. Auditing is turned off out of the box by default. It must be enabled using PeopleSoft Application Designer. The audit record for Installed Product is RF_INST_PROD_AT. This record contains the fields from these records on which auditing must be enabled if desired: RF_INST_PROD (the main installed product record), RF_INST_PROD_ST (the status record), and RF_INST_PROD_PM (the preventive maintenance record).

See *PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook*, "Setting Up Auditing for Cases and Inbound Email".

Cases and Service Orders Link

Click the Cases and Service Orders link to view the cases and services orders that are associated with the installed product, service, or asset. The system displays the case and service order IDs and provides links to the Case and Service Orders pages.

Within the Associated Cases group box the system displays a summary of the case, the status, the date the case was created, who created the case, and the date the case was closed.

There are three tabs within the Associated Service Orders group box.

- On the Service order tab the system displays a description of the service, the status, the date the service order was created, who created the service order, and the date that the customer was provided service.
- On the Assignments tab, the system displays the name of the provider group and the assigned technician.
- On the Sources tab the system displays whether the service order was created from a case, order, or a request for preventative maintenance.

The Material Orders link appears preceding the Associated Service Order group box. Click this link to go to the Installed Product Material page, which contains grids for the used and removed materials for each associated service order. Each grid includes the service order ID, created date, item ID, item description and quantity (used or removed).

Viewing Installed Products

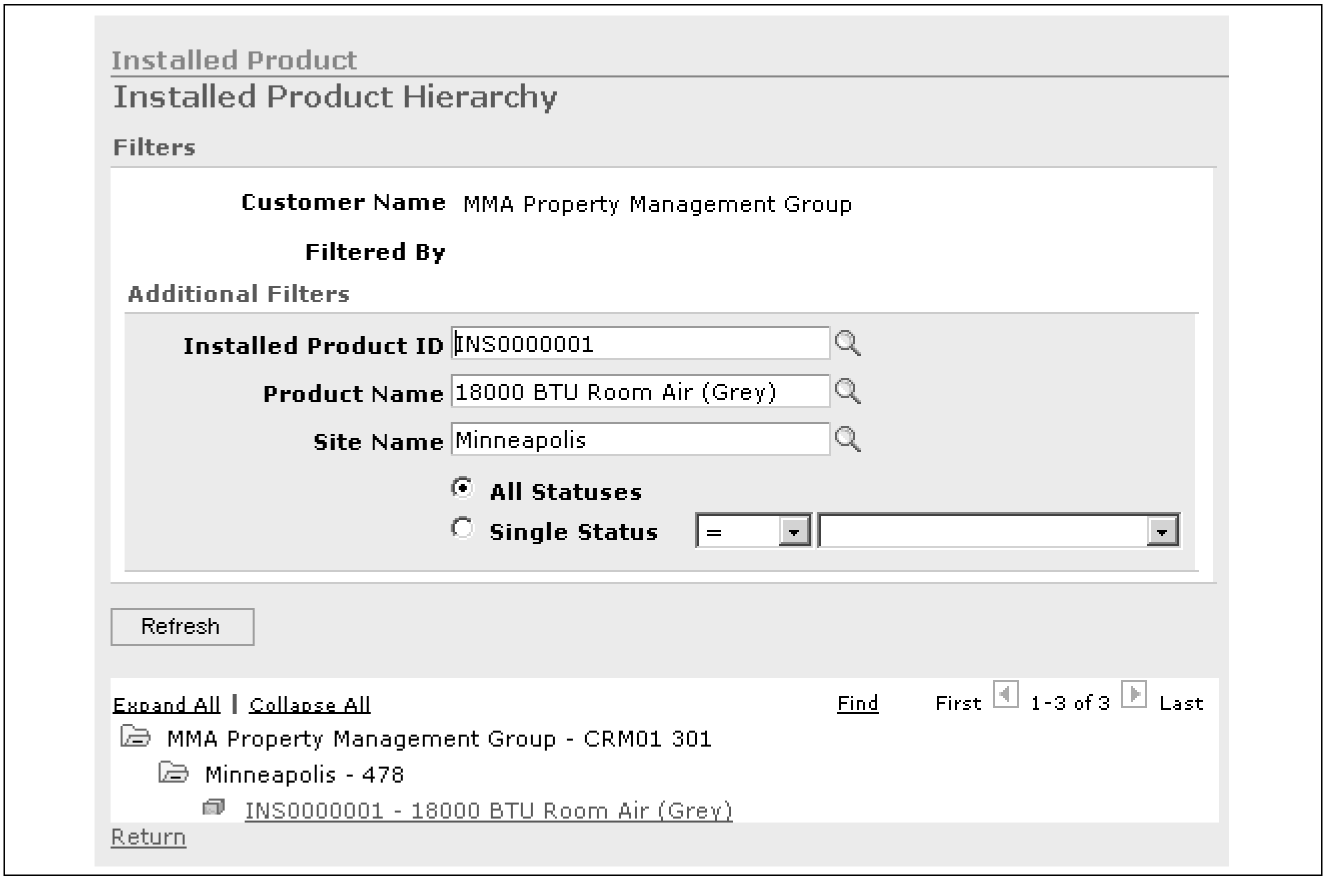
This section discusses how to use the installed product viewable hierarchy.

Page Used to View the Installed Product Hierarchy

Page Name	Object Name	Navigation	Usage
Installed Product Hierarchy	RF_INSTPROD_VH_SEC	Click the View Hierarchy button from the Installed Product, Service Order, My Service Order, Support Case, HelpDesk Case, RMA (return material authorization), FormSite (under Customers CRM), Product Registration Installed Assets, Search Installed Products and Services, Search Installed Assets, Customer 360 Degree View, Worker 360 Degree View, Order Capture Entry, Self-Service Accounts, Self-Service View Services, Self-Service Support Case, and Self-Service HelpDesk Case pages.	View the installed products that meet the customer or internal worker, site, product, serial number, asset tag, and department criteria that is available on the source page. For the installed products that the system returns, you can also view record status and parent, child, and sibling relationships to other installed products.

Using the Installed Product Hierarchy

Access the Installed Product Hierarchy page.



Installed Product Viewable Hierarchy page

Note. This hierarchy is not available for service orders or cases, if they are configured to hide installed product information (through the corresponding service order or call center configuration templates). There are additional runtime filters that you can turn on using the Tree Configuration: Department (if PeopleSoft HelpDesk installed) and Account.

Filters Displays the values that are available on the source page that the system used to filter the initial view of the hierarchy.

All Statuses and **Single Status** Select the status of the installed products that should be included in the hierarchical view.

Note. If you select Single Status, you can also use either the equal to (=) or not equal to (not =) operator to select a status for which you want to search for a product.

Refresh Click to update the display after specifying alternate status values.

The system displays the Installed Product ID (always), Description (always), Site, Department, and Account fields for each installed product that meets the filter criteria. The system only displays these fields (Site, Department, and Account) if they are configured to displays when you define the tree set up and department. In addition, these filters are available only if you have PeopleSoft HelpDesk installed. Click the link of an installed product to access the Installed Product page, where you can update information as necessary.

Note. The system displays the Change Order button next to selected products as it does next to the Product ID on the Installed Product page. The button is only shown for those products meeting the criteria mentioned above.

When the tree information requires more space than can fit on the page, use the positional links (First, Previous, Next, Last, Left, and Right) at the top of the tree to navigate through the information. Click the folders that appear in the tree to collapse or expand specific sections of the hierarchy.

APPENDIX A

ISO Country and Currency Codes

PeopleBooks use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

This appendix discusses:

- ISO country codes.
- ISO currency codes.

See Also

"About This PeopleBook," Typographical Conventions and Visual Cues

ISO Country Codes

This table lists the ISO country codes that may appear as country identifiers in PeopleBooks:

ISO Country Code	Country Name
ABW	Aruba
AFG	Afghanistan
AGO	Angola
AIA	Anguilla
ALB	Albania
AND	Andorra
ANT	Netherlands Antilles
ARE	United Arab Emirates
ARG	Argentina
ARM	Armenia
ASM	American Samoa
ATA	Antarctica

ISO Country Code	Country Name
ATF	French Southern Territories
ATG	Antigua and Barbuda
AUS	Australia
AUT	Austria
AZE	Azerbaijan
BDI	Burundi
BEL	Belgium
BEN	Benin
BFA	Burkina Faso
BGD	Bangladesh
BGR	Bulgaria
BHR	Bahrain
BHS	Bahamas
BIH	Bosnia and Herzegovina
BLR	Belarus
BLZ	Belize
BMU	Bermuda
BOL	Bolivia
BRA	Brazil
BRB	Barbados
BRN	Brunei Darussalam
BTN	Bhutan
BVT	Bouvet Island
BWA	Botswana
CAF	Central African Republic
CAN	Canada
CCK	Cocos (Keeling) Islands

ISO Country Code	Country Name
CHE	Switzerland
CHL	Chile
CHN	China
CIV	Cote D'Ivoire
CMR	Cameroon
COD	Congo, The Democratic Republic
COG	Congo
COK	Cook Islands
COL	Colombia
COM	Comoros
CPV	Cape Verde
CRI	Costa Rica
CUB	Cuba
CXR	Christmas Island
CYM	Cayman Islands
CYP	Cyprus
CZE	Czech Republic
DEU	Germany
DJI	Djibouti
DMA	Dominica
DNK	Denmark
DOM	Dominican Republic
DZA	Algeria
ECU	Ecuador
EGY	Egypt
ERI	Eritrea
ESH	Western Sahara

ISO Country Code	Country Name
ESP	Spain
EST	Estonia
ETH	Ethiopia
FIN	Finland
FJI	Fiji
FLK	Falkland Islands (Malvinas)
FRA	France
FRO	Faroe Islands
FSM	Micronesia, Federated States
GAB	Gabon
GBR	United Kingdom
GEO	Georgia
GHA	Ghana
GIB	Gibraltar
GIN	Guinea
GLP	Guadeloupe
GMB	Gambia
GNB	Guinea-Bissau
GNQ	Equatorial Guinea
GRC	Greece
GRD	Grenada
GRL	Greenland
GTM	Guatemala
GUF	French Guiana
GUM	Guam
GUY	Guyana
GXA	GXA - GP Core Country

ISO Country Code	Country Name
GXB	GXB - GP Core Country
GXC	GXC - GP Core Country
GXD	GXD - GP Core Country
HKG	Hong Kong
HMD	Heard and McDonald Islands
HND	Honduras
HRV	Croatia
HTI	Haiti
HUN	Hungary
IDN	Indonesia
IND	India
IOT	British Indian Ocean Territory
IRL	Ireland
IRN	Iran (Islamic Republic Of)
IRQ	Iraq
ISL	Iceland
ISR	Israel
ITA	Italy
JAM	Jamaica
JOR	Jordan
JPN	Japan
KAZ	Kazakstan
KEN	Kenya
KGZ	Kyrgyzstan
KHM	Cambodia
KIR	Kiribati
KNA	Saint Kitts and Nevis

ISO Country Code	Country Name
KOR	Korea, Republic of
KWT	Kuwait
LAO	Lao People's Democratic Rep
LBN	Lebanon
LBR	Liberia
LBY	Libyan Arab Jamahiriya
LCA	Saint Lucia
LIE	Liechtenstein
LKA	Sri Lanka
LSO	Lesotho
LTU	Lithuania
LUX	Luxembourg
LVA	Latvia
MAC	Macao
MAR	Morocco
MCO	Monaco
MDA	Moldova, Republic of
MDG	Madagascar
MDV	Maldives
MEX	Mexico
MHL	Marshall Islands
MKD	Fmr Yugoslav Rep of Macedonia
MLI	Mali
MLT	Malta
MMR	Myanmar
MNG	Mongolia
MNP	Northern Mariana Islands

ISO Country Code	Country Name
MOZ	Mozambique
MRT	Mauritania
MSR	Montserrat
MTQ	Martinique
MUS	Mauritius
MWI	Malawi
MYS	Malaysia
MYT	Mayotte
NAM	Namibia
NCL	New Caledonia
NER	Niger
NFK	Norfolk Island
NGA	Nigeria
NIC	Nicaragua
NIU	Niue
NLD	Netherlands
NOR	Norway
NPL	Nepal
NRU	Nauru
NZL	New Zealand
OMN	Oman
PAK	Pakistan
PAN	Panama
PCN	Pitcairn
PER	Peru
PHL	Philippines
PLW	Palau

ISO Country Code	Country Name
PNG	Papua New Guinea
POL	Poland
PRI	Puerto Rico
PRK	Korea, Democratic People’s Rep
PRT	Portugal
PRY	Paraguay
PSE	Palestinian Territory, Occupie
PYF	French Polynesia
QAT	Qatar
REU	Reunion
ROU	Romania
RUS	Russian Federation
RWA	Rwanda
SAU	Saudi Arabia
SDN	Sudan
SEN	Senegal
SGP	Singapore
SGS	Sth Georgia & Sth Sandwich Is
SHN	Saint Helena
SJM	Svalbard and Jan Mayen
SLB	Solomon Islands
SLE	Sierra Leone
SLV	El Salvador
SMR	San Marino
SOM	Somalia
SPM	Saint Pierre and Miquelon
STP	Sao Tome and Principe

ISO Country Code	Country Name
SUR	Suriname
SVK	Slovakia
SVN	Slovenia
SWE	Sweden
SWZ	Swaziland
SYC	Seychelles
SYR	Syrian Arab Republic
TCA	Turks and Caicos Islands
TCD	Chad
TGO	Togo
THA	Thailand
TJK	Tajikistan
TKL	Tokelau
TKM	Turkmenistan
TLS	East Timor
TON	Tonga
TTO	Trinidad and Tobago
TUN	Tunisia
TUR	Turkey
TUV	Tuvalu
TWN	Taiwan, Province of China
TZA	Tanzania, United Republic of
UGA	Uganda
UKR	Ukraine
UMI	US Minor Outlying Islands
URY	Uruguay
USA	United States

ISO Country Code	Country Name
UZB	Uzbekistan
VAT	Holy See (Vatican City State)
VCT	St Vincent and the Grenadines
VEN	Venezuela
VGB	Virgin Islands (British)
VIR	Virgin Islands (U.S.)
VNM	Viet Nam
VUT	Vanuatu
WLF	Wallis and Futuna Islands
WSM	Samoa
YEM	Yemen
YUG	Yugoslavia
ZAF	South Africa
ZMB	Zambia
ZWE	Zimbabwe

ISO Currency Codes

This table lists the ISO country codes that may appear as currency identifiers in PeopleBooks:

ISO Currency Code	Description
ADP	Andorran Peseta
AED	United Arab Emirates Dirham
AFA	Afghani
AFN	Afghani
ALK	Old Lek
ALL	Lek
AMD	Armenian Dram

ISO Currency Code	Description
ANG	Netherlands Antilles Guilder
AOA	Kwanza
AOK	Kwanza
AON	New Kwanza
AOR	Kwanza Reajustado
ARA	Austral
ARP	Peso Argentino
ARS	Argentine Peso
ARY	Peso
ATS	Schilling
AUD	Australian Dollar
AWG	Aruban Guilder
AZM	Azerbaijanian Manat
BAD	Dinar
BAM	Convertible Marks
BBD	Barbados Dollar
BDT	Taka
BEC	Convertible Franc
BEF	Belgian Franc
BEL	Financial Belgian Franc
BGJ	Lev A/52
BGK	Lev A/62
BGL	Lev
BGN	Bulgarian LEV
BHD	Bahraini Dinar
BIF	Burundi Franc
BMD	Bermudian Dollar

ISO Currency Code	Description
BND	Brunei Dollar
BOB	Boliviano
BOP	Peso
BOV	Mvdol
BRB	Cruzeiro
BRC	Cruzado
BRE	Cruzeiro
BRL	Brazilian Real
BRN	New Cruzado
BRR	Brazilian Real Dollar
BSD	Bahamian Dollar
BTN	Ngultrum
BUK	N/A
BWP	Pula
BYB	Belarussian Ruble
BYR	Belarussian Ruble
BZD	Belize Dollar
CAD	Canadian Dollar
CDF	Franc Congolais
CHF	Swiss Franc
CLF	Unidades de fomento
CLP	Chilean Peso
CNX	Peoples Bank Dollar
CNY	Yuan Renminbi
COP	Colombian Peso
CRC	Costa Rican Colon
CSD	Serbia Dinar

ISO Currency Code	Description
CSJ	Krona A/53
CSK	Koruna
CUP	Cuban Peso
CVE	Cape Verde Escudo
CYP	Cyprus Pound
CZK	Czech Koruna
DEM	Deutsche Mark
DJF	Djibouti Franc
DKK	Danish Krone
DOP	Dominican Peso
DZD	Algerian Dinar
ECS	Sucre
ECV	Unidad de Valor
EEK	Kroon
EGP	Egyptian Pound
EQE	Ekwele
ERN	Nakfa
ESA	Spanish Peseta
ESB	Convertible Peseta
ESP	Spanish Peseta
ETB	Ethiopian Birr
EUR	euro
FIM	Markka
FJD	Fiji Dollar
FKP	Falklands Isl. Pound
FRF	French Franc
GBP	Pound Sterling

ISO Currency Code	Description
GEK	Georgian Coupon
GEL	Lari
GHC	Cedi
GIP	Gibraltar Pound
GMD	Dalasi
GNE	Syli
GNF	Guinea Franc
GNS	Syli
GQE	Ekwele
GRD	Drachma
GTQ	Quetzal
GWE	Guinea Escudo
GWP	Guinea-Bissau Peso
GYD	Guyana Dollar
HKD	Hong Kong Dollar
HNL	Lempira
HRD	Dinar
HRK	Kuna
HTG	Gourde
HUF	Forint
IDR	Rupiah
IEP	Irish Pound
ILP	Pound
ILR	Old Shekel
ILS	New Israeli Sheqel
INR	Indian Rupee
IQD	Iraqi Dinar

ISO Currency Code	Description
IRR	Iranian Rial
ISJ	Old Krona
ISK	Iceland Krona
ITL	Italian Lira
JMD	Jamaican Dollar
JOD	Jordanian Dinar
JPY	Yen
KES	Kenyan Shilling
KGS	Som
KHR	Riel
KMF	Comoro Franc
KPW	North Korean Won
KRW	Won
KWD	Kuwaiti Dinar
KYD	Cayman Islands dollar
KZT	Tenge
LAJ	Kip Pot Pol
LAK	Kip
LBP	Lebanese Pound
LKR	Sri Lanka Rupee
LRD	Liberian Dollar
LSL	Loti
LSM	Maloti
LTL	Lithuanian Litas
LTT	Talonas
LUC	Convertib Francl
LUF	Luxembourg Franc

ISO Currency Code	Description
LUL	Financial Franc
LVL	Latvian Lats
LVR	Latvian Ruble
LYD	Libyan Dinar
MAD	Moroccan Dirham
MAF	Mali Franc
MDL	Moldovan Leu
MGF	Malagasy Franc
MKD	Denar
MLF	Mali Franc
MMK	Kyat
MNT	Tugrik
MOP	Pataca
MRO	Ouguiya
MTL	Maltese Lira
MTP	Maltese Pound
MUR	Mauritius Rupee
MVQ	Maldive Rupee
MVR	Rufiyaa
MWK	Malawian Kwacha
MXN	Mexican Peso
MXP	Mexican Peso
MXV	Mexican UDI
MYR	Malaysian Ringgit
MZE	Mozambique Escudo
MZM	Metical
NAD	Namibia Dollar

ISO Currency Code	Description
NGN	Naira
NIC	Cordoba
NIO	Cordoba Oro
NLG	Netherlands Guilder
NOK	Norwegian Krone
NPR	Nepalese Rupee
NZD	New Zealand Dollar
OMR	Rial Omani
PAB	Balboa
PEI	Inti
PEN	Nuevo Sol
PES	Sol
PGK	Kina
PHP	Philippine Peso
PKR	Pakistan Rupee
PLN	Zloty
PLZ	Zloty
PTE	Portuguese Escudo
PYG	Guarani
QAR	Qatari Rial
ROK	Leu A/52
ROL	Leu
RUB	Russian Ruble
RUR	Russian Federation Rouble
RWF	Rwanda Franc
SAR	Saudi Riyal
SBD	Solomon Islands

ISO Currency Code	Description
SCR	Seychelles Rupee
SDD	Sudanese Dinar
SDP	Sudanese Pound
SEK	Swedish Krona
SGD	Singapore Dollar
SHP	St Helena Pound
SIT	Tolar
SKK	Slovak Koruna
SLL	Leone
SOS	Somali Shilling
SRG	Surinam Guilder
STD	Dobra
SUR	Rouble
SVC	El Salvador Colon
SYP	Syrian Pound
SZL	Lilangeni
THB	Baht
TJR	Tajik Ruble
TJS	Somoni
TMM	Manat
TND	Tunisian Dinar
TOP	Pa’anga
TPE	Timor Escudo
TRL	Turkish Lira
TTD	Trinidad Dollar
TWD	New Taiwan Dollar
TZS	Tanzanian Shilling

ISO Currency Code	Description
UAH	Hryvnia
UAK	Karbovanet
UGS	Uganda Shilling
UGW	Old Shilling
UGX	Uganda Shilling
USD	US Dollar
USN	US Dollar (Next day)
USS	US Dollar (Same day)
UYN	Old Uruguay Peso
UYP	Uruguayan Peso
UYU	Peso Uruguayo
UZS	Uzbekistan Sum
VEB	Bolivar
VNC	Old Dong
VND	Dong
VUV	Vatu
WST	Tala
XAF	CFA Franc BEAC
XAG	Silver
XAU	GOLD
XBA	European Composite Unit
XBB	European Monetary Unit
XBC	European Unit of Account 9
XBD	European Unit of Account 17
XCD	East Caribbean Dollar
XDR	SDR
XEU	EU Currency (E.C.U)

ISO Currency Code	Description
XFO	Gold-Franc
XFU	UIC-Franc
XOF	CFA Franc BCEAO
XPD	Palladium
XPF	CFP Franc
XPT	Platinum
XTS	For Testing Purposes
XXX	Non Currency Transaction
YDD	Yemeni Din
YER	Yemeni Rial
YUD	New Yugoslavian Dinar
YUM	New Dinar
YUN	Yugoslavian Dinar
ZAL	Financial Rand
ZAR	Rand
ZMK	Zambian Kwacha
ZRN	New Zaire
ZRZ	Zaire
ZWC	Rhodesian Dollar
ZWD	Zimbabwe Dollar

Glossary of PeopleSoft Terms

absence entitlement This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.

absence take This element defines the conditions that must be met before a payee is entitled to take paid time off.

accounting class In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.

accounting date The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.

accounting split The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.

accumulator You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.

action reason The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.

action template In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.

activity In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.

In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.

In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.

In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.

agreement	In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
AR specialist	Abbreviation for *receivables specialist.* In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
assessment rule	In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
book	In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business event	In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

	In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, “Introduction to Microsoft Word.” A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company’s catalog.
catalog partner	In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
checkbook	In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called *sub-classification.*
clone	In PeopleCode, to make a unique copy. In contrast, to *copy* may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.

collection rule In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.

compensation object In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.

compensation structure In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.

condition In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.

configuration parameter catalog Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.

configuration plan In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.

content reference Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.

context In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.

In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.

control table Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.

cost profile A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.

cost row A cost transaction and amount for a set of ChartFields.

current learning In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.

data acquisition In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).

data elements Data elements, at their simplest level, define a subset of data and the rules by which to group them.

For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.

dataset A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.

In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.

delivery method type In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.

directory information tree In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.

document sequencing A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.

dynamic detail tree A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.

edit table A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.

effective date A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.

EIM ledger Abbreviation for *Enterprise Incentive Management ledger.* In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.

elimination set In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.

entry event In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.

equitization In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.

event A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.

In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.

event propagation process In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects.

Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.

exception — In PeopleSoft Receivables, an item that either is a deduction or is in dispute.

exclusive pricing — In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.

fact — In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.

forecast item — A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.

fund — In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.

generic process type — In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.

group — In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs).

In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.

incentive object — In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.

incentive rule — In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.

incur — In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.

item — In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse).

In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.

In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment.

KPI — An abbreviation for *key performance indicator.* A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file
Abbreviation for *Lightweight Directory Access Protocol (LDAP) Data Interchange Format file.* Contains discrepancies between PeopleSoft data and directory data.

learner group
In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.

learning components
In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.

learning environment
In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.

learning history
In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.

ledger mapping
You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as *rates*) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.

library section
In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.

linked section
In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.

linked variable
In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.

load
In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.

local functionality
In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.

location
Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a *1*—is the address you use most often and may be different from the main address.

logistical task
In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new

laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.

market template In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.

match group In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.

MCF server Abbreviation for *PeopleSoft MultiChannel Framework server.* Comprises the universal queue server and the MCF log server. Both processes are started when *MCF Servers* is selected in an application server domain configuration.

merchandising activity In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.

meta-SQL Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.

metastring Metastrings are special expressions included in SQL string literals. The metastrings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.

multibook In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).

multicurrency The ability to process transactions in a currency other than the business unit's base currency.

national allowance In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.

node-oriented tree A tree that is based on a detail structure, but the detail values are not used.

pagelet Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.

participant In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.

participant object Each participant object may be related to one or more compensation objects.

See also *compensation object*.

partner A company that supplies products or services that are resold or purchased by the enterprise.

pay cycle In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.

pending item In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
price list	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

price rule condition	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
price rule key	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.
progress log	In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for *record input value-added tax flag.* Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT

on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.

record output VAT flag — Abbreviation for *record output value-added tax flag.*

See *record input VAT flag.*

reference data — In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.

reference object — In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).

reference transaction — In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.

regional sourcing — In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.

relationship object — In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.

remote data source data — Data that is extracted from a separate database and migrated into the local database.

REN server — Abbreviation for *real-time event notification server* in PeopleSoft MultiChannel Framework.

requester — In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.

role — Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.

role user — A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.

roll up — In a tree, to roll up is to total sums based on the information hierarchy.

run control — A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.

run control ID — A unique ID to associate each user with his or her own run control table entries.

run-level context In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.

search query You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.

section In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.

security event In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.

serial genealogy In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.

serial in production In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.

session In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.

session template In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.

setup relationship In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.

share driver expression In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.

single signon With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.

source transaction In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.

SpeedChart A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.

SpeedType A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.

staging A method of consolidating selected partner offerings with the offerings from the enterprise’s other partners.

statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary time period	In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the *basis* tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
template	A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather

than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.

trace usage
In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.

transaction allocation
In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.

transaction state
In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.

Translate table
A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.

tree
The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.

unclaimed transaction
In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.

universal navigation header
Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.

user interaction object
In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).

variable
In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.

VAT exception
Abbreviation for *value-added tax exception.* A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.

VAT exempt
Abbreviation for *value-added tax exempt.* Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.

VAT exoneration
Abbreviation for *value-added tax exoneration.* An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.

VAT suspension
Abbreviation for *value-added tax suspension.* An organization that has been granted a temporary exemption from paying VAT.

warehouse
A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

work order In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.

worksheet A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.

worklist The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.

XML schema An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.

yield by operation In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.

zero-rated VAT Abbreviation for *zero-rated value-added tax.* A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

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