



PeopleSoft Enterprise CRM

8.9 Application Fundamentals

PeopleBook

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PeopleSoft Enterprise CRM 8.9 Application Fundamentals PeopleBook

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Contents

General Preface

About This PeopleBook	xxi
PeopleSoft Application Prerequisites.....	xxi
PeopleSoft Application Fundamentals.....	xxi
Related Documentation.....	xxii
Obtaining Documentation Updates.....	xxii
Ordering Printed Documentation.....	xxii
Typographical Conventions and Visual Cues.....	xxiii
Typographical Conventions.....	xxiii
Visual Cues.....	xxiv
Country, Region, and Industry Identifiers.....	xxiv
Currency Codes.....	xxv
Comments and Suggestions.....	xxv
Common Elements in These PeopleBooks	xxv

Preface

PeopleSoft Enterprise Customer Relationship Management Application Fundamentals Preface.....	xxvii
Additional Resources.....	xxvii
PeopleSoft Enterprise CRM Business Object Management.....	xxviii
PeopleSoft Enterprise CRM Product and Item Management.....	xxix
PeopleSoft CRM Automation and Configuration Tools.....	xxix
PeopleSoft CRM Services Foundation.....	xxix
PeopleTools PeopleBooks.....	xxx

Part 1 Getting Started

Chapter 1

Getting Started with PeopleSoft Enterprise Customer Relationship Management 8.9 Applications.....	3
PeopleSoft Enterprise CRM 8.9 Application Fundamentals Overview.....	3
PeopleSoft Enterprise CRM 8.9 Cross-Product Integrations.....	4

PeopleSoft Enterprise CRM 8.9 Applications Implementation.....	4
--	---

Part 2

CRM Multi-Product Foundation

Chapter 2

Working with Business Units and TableSet Controls.....	7
Understanding Business Units in PeopleSoft Enterprise CRM.....	7
Understanding TableSet Controls in PeopleSoft Enterprise CRM.....	9
TableSet Control Terminology.....	9
TableSet Control Scenarios.....	10
TableSet Control Example.....	11
Defining Business Units and TableSet Controls.....	13
TableSet Control Setup.....	13
Pages Used to Define Business Units and TableSet Controls	15

Chapter 3

Setting Up General Options.....	17
Understanding PeopleSoft Enterprise CRM General Options.....	17
Automatic Numbering.....	17
Installation Options.....	19
Regions.....	20
Setting Up Automatic Numbering.....	20
Pages Used to Set Up Automatic Numbering Rules.....	20
Setting Up Automatic Numbering Rules.....	20
Specifying Last Numbers.....	21
Setting Up PeopleSoft Enterprise CRM Application Installation Options.....	22
Pages Used to Set Up PeopleSoft Enterprise CRM Application Installation Options	23
Setting Up General Options	23
Setting Calendar Options.....	25
Setting Up Alternate Characters.....	26
Setting Up an Anonymous Business Object.....	26
Setting Up HRHD EIP Options.....	26
Setting Up Billing and Pricing Options.....	26
Setting Up Regions.....	27
Page Used to Set Up Regions	27
Setting Up Regions.....	27

Setting Up Locations.....	28
Pages Used to Set Up Locations	28
Defining Locations.....	28
Entering Location Details	29
Associating Locations with Time Zones	30
Setting Up Address Formats and Values.....	30
Pages Used to Set Up Addresses	31
Updating Country Definitions.....	31
Specifying Address Formats	31
Adding State or Province Codes.....	33
Setting Up Salutation Codes.....	33
Page Used to Set Up Salutation Codes	33
Defining Alpha Indexes.....	33
Understanding Alpha Indexes.....	33
Page Used to Define Alpha Indexes.....	34
Defining Alpha Indexes.....	34
Setting Up Payment Terms.....	35
Pages Used to Set Up Payment Terms.....	35
Defining Units of Measure	35
Pages Used to Set Up Units of Measure	35
Setting Up Units of Measure	35
Setting Up Data Archiving.....	36

Chapter 4

Setting Up PeopleSoft Customer Relationship Management Security and User Preferences.....	39
Understanding PeopleSoft Enterprise CRM Security	39
Security Building Blocks	39
Security Terminology.....	40
PeopleTools Security.....	41
Application Security.....	44
Distributed Security.....	55
Setting System-Wide Security Options.....	56
Understanding Row-Level Security Views.....	57
Understanding Sensitive Worker Information.....	58
Predefined Security Roles and Sample Users.....	58
Pages Used to Set System-Wide Security Options.....	68
Selecting System-Wide Security Options.....	69
Activating Security Options.....	70
Defining View Security.....	70

Defining Business Unit Security by Permission List.....	71
Defining Business Unit Security by User ID.....	72
Defining TableSet Security by Permission List.....	72
Defining TableSet Security by User ID.....	73
Defining Overall Preferences	73
Defining Call Center Preferences	76
Defining Sales Preferences.....	77
Defining Change Management Preferences.....	77
Defining Account Preferences.....	78
Defining Roles with Access to Sensitive Worker Information.....	79
Implementing Self-Service Security.....	80
Understanding Privileges Codes	80
Understanding Custom Privilege Codes.....	81
Pages Used to Implement Self-Service Security.....	83
Establishing Privilege Codes and Custom Privilege Codes.....	83
Assigning Privileges to Users.....	84
Assigning Privileges to Roles.....	85
Setting Up Existing Customer User Registration Templates.....	85
Registering Business Users.....	86
Setting Up Guest Users.....	87
Setting up Terms and Conditions for Self-Service Users.....	90
Setting up Terms of Service for Self-Service Users.....	90
Setting up Privacy Policies for Self-Service Users.....	91
Defining Application Security.....	92
Pages Used to Define Application Security.....	93
Defining Security Objects.....	95
Adding Membership List Names and Descriptions.....	97
Selecting Membership Objects and Object Members.....	98
Selecting the Membership Type.....	99
Adding Members to a Static Membership List.....	99
Choosing the Dynamic Criteria for the Membership List.....	100
Adding View List Names and Descriptions.....	101
Selecting View Objects and Options.....	101
Selecting the View Type.....	102
Adding Members to Static View List.....	102
Choosing the Dynamic Criteria for the View List.....	103
Defining Functional Options.....	104
Defining Functional Option Groups.....	105
Adding Functional Option Groups and View Lists to the Security Profile.....	107
Adding Membership Lists to the Security Profile.....	108

Setting Run Controls for the List Build Process.....	108
Entering Static Menu Transfer Paths.....	109

Chapter 5

Working with Notes and Attachments.....	111
Understanding Notes and Attachments.....	111
Notes in PeopleSoft Enterprise CRM.....	111
Attachments.....	112
Note Types.....	112
Setting Up Note Types.....	113
Pages Used to Set Up Note Types.....	113
Creating Standard Notes and Product Notes.....	113
Pages Used to Create Standard Notes and Product Notes.....	114
Creating Standard Notes.....	114
Creating Product Notes.....	114
Entering and Viewing Notes.....	115
Pages Used to View and Enter Notes.....	115
Viewing Lists of Notes.....	116
Entering Notes.....	117
Adding Attachments to Notes.....	119
Selecting a File to Add as an Attachment.....	119

Chapter 6

Using Interactive Reports.....	121
Understanding Interactive Reports.....	121
Interactive Reports and BAM.....	121
Delivered Report and Query Definitions.....	122
Servers.....	123
Launching Interactive Reports.....	123

Chapter 7

Setting Up Currencies.....	125
Understanding Currencies.....	125
Currency Management in PeopleSoft Enterprise CRM.....	125
Direct and Indirect Rate Quotations.....	126
Triangulation.....	126
Automatic Reciprocation of Quote Methods.....	127

Setting Up Currencies.....	127
Pages Used to Set Up Currencies.....	128
Adding or Updating Currency Codes.....	128
Setting Up the Currency Quotation Method.....	129
Calculating Currency Exchange.....	130
Page Used to Calculate Currency Exchange.....	130
Calculating Currency Exchange.....	130

Chapter 8

Implementing Alternate Character.....	133
Understanding Alternate Character.....	133
Alternate Character Functionality.....	133
Alternate Character Fields.....	134
Alternate Character Searches.....	134
Configuring the System for Alternate Character Usage.....	134
Pages Used to Configure the System for Alternate Character Usage.....	135
Setting Up Alternate Characters for Language Codes.....	135
Enabling Alternate Character Functionality for a User.....	135
Enabling Business Object Search to Recognize Alternate Character Fields.....	135

Chapter 9

Setting Up Auditing for Cases and Inbound Email.....	137
Understanding Audit Information.....	137
History Versus Auditing.....	137
The Audit Record.....	138
Setting Up Case Auditing.....	139
Page Used to Set Up Case Auditing.....	139
Choosing Actions to Audit.....	140

Chapter 10

Running Diagnostic Reports.....	143
Understanding PeopleSoft Enterprise CRM Diagnostics.....	143
Registering PeopleSoft Enterprise CRM Diagnostics.....	145
Page Used to Register PeopleSoft Enterprise CRM Diagnostics.....	145
Registering Diagnostic Packages.....	145
Running PeopleSoft Enterprise CRM Diagnostic Packages.....	145
Pages Used to Run PeopleSoft Enterprise CRM Diagnostic Packages.....	146

Selecting and Running Diagnostic Packages.....	146
Viewing Diagnostics.....	146

Part 3

Workforce Management

Chapter 11

Setting Up and Maintaining Provider Groups and Group Members.....	151
Understanding Provider Groups and Group Members.....	151
Establishing Cost Categories for Workers.....	153
Page Used to Define Cost Categories.....	153
Defining Cost Categories.....	153
Defining Provider Groups	155
Prerequisites.....	155
Common Elements Used in This Section.....	155
Pages Used to Define Provider Groups.....	155
Defining Provider Groups.....	156
Defining Provider Group Members.....	158
Defining Schedules for Provider Groups.....	160
Page Used to Define Schedules for Provider Groups	160
Defining Schedules.....	160
Defining Group Assignment Criteria and Competencies.....	162
Pages Used to Define Group Assignment Criteria and Competencies.....	162
Defining Assignment Criteria.....	162
Associating Competencies with Provider Groups.....	164

Chapter 12

Managing Workforce Competencies.....	167
Understanding Competencies in PeopleSoft CRM.....	167
Setting Up Competency Information in PeopleSoft CRM.....	168
Pages Used to Set Up Competency Information in PeopleSoft CRM	169
Defining Competency Rating Models.....	169
Defining Competency Types.....	170
Defining Competencies.....	170
Defining Competency Proficiency Levels.....	171
Defining Minimum Competency Requirements for Service Orders or Cases.....	172

Chapter 13

Setting Up and Performing Assignment Searches.....	173
Understanding Assignment Searches.....	173
Fit Scores.....	173
Activity.....	173
Assignment Criteria.....	174
Candidate Selection and Fit Score Calculations.....	178
Setting Up the Assignment Searches.....	183
Pages Used to Set Up Assignment Searches.....	183
Defining Worker Schedules and Assignment Criteria.....	185
Defining Provider Group Schedules and Assignment Criteria.....	186
Associating Competency Information with Services and Service Activities.....	186
Associating Competency Information with Problem Types.....	187
Associating Competency Information with Categories, Specialty Types, and Details.....	187
Establishing Weighting Factors for Provider Group Criteria Matches.....	187
Establishing Weighting Factors for Group Member Criteria Matches.....	188
Specifying Assignment Engine Setup.....	189
Reviewing and Assigning Provider Groups	190
Common Elements Used in This Section.....	190
Pages Used to Review and Assign Provider Groups.....	191
Reviewing Provider Group Summary Search Results and Assigning Provider Groups.....	191
Reviewing Provider Group Detail Search Results and Assigning Provider Groups.....	192
Reviewing and Assigning Group Members.....	192
Common Elements Used in This Section.....	193
Pages Used to Review and Assign Group Members.....	194
Reviewing Group Member Summary Search Results and Assigning Group Members.....	194
Reviewing Group Member Detail Search Results and Assigning Group Members.....	195

Chapter 14

Defining Holiday Schedules.....	197
Understanding Holiday Schedules.....	197
Defining Holiday Schedules, Time Frames, and Sales Quota Rollups.....	197
Pages Used to Define Holiday Schedules.....	198
Defining Standard Workday Information.....	198
Defining Holidays.....	198
Define Time Frames for Forecasting, Pipeline Analysis, Planning, and Portfolio Examination	199
Define Time Frames for Sales Quota Rollups.....	200
Associating Provider Groups with Holiday Schedules.....	201
Associating Workers with Holiday Schedules.....	201

Updating Workers' Calendars with Specified Holiday Schedules.....	201
Page Used to Update Workers' Calendars with Specified Holiday Schedules.....	202
Updating Workers' Calendars with Specified Holiday Schedules.....	202

Chapter 15

Using Calendars.....	205
Understanding Calendars.....	205
Setting Up Calendars.....	205
Common Elements Used in this Section.....	206
Pages Used to Set Up Calendars.....	207
Viewing Daily Calendars.....	207
Viewing Weekly Calendars.....	208
Viewing Monthly Calendars.....	209
Integrating Calendars with Third-Party Applications.....	210

Part 4

Interactions and 360-Degree Views

Chapter 16

Working with Interactions.....	213
Understanding Interactions.....	213
Interactions and Subinteractions.....	213
Contact Methods and Status.....	214
Interaction Creation.....	215
Interaction Display.....	217
Modifying Interaction Status.....	218
Page Used to Set Up Interaction Status.....	219
Modifying Interaction Status Descriptions.....	219
Viewing Interactions.....	219
Pages Used to View Interactions.....	220
Searching for Interactions.....	221
Viewing Interaction Details.....	223
Viewing Correspondence Interaction Details.....	224

Chapter 17

Setting Up the 360-Degree View.....	225
Understanding the 360-Degree View.....	225
360-Degree Views in PeopleSoft CRM.....	225
360-Degree View Integrations.....	227
360-Degree View System Data.....	227
360-Degree View Setup Process.....	227
Configuring Transactions for the 360-Degree View.....	229
Understanding Transactions.....	229
Pages Used to Configure Transactions for the 360-Degree View.....	229
Defining Transaction Groups.....	229
Setting Up the 360-Degree View Tree.....	231
Prerequisites.....	231
Pages Used to Set Up the 360-Degree View Tree.....	232
Defining Nodes.....	232
Setting Up Trees.....	237
Setting Up Nodes.....	238
Testing Trees.....	239
Searching for and Viewing Application Packages.....	240
Configuring the 360-Degree View.....	241
Pages Used to Configure the 360-Degree View.....	241
Setting Up Profiles.....	241
Configuring Roles.....	243
Defining Transactions with Subinteractions	245
Defining Nodes to Capture Subinteractions For.....	246
Defining Dynamic Grids.....	247
Configuring the 360-Degree View Search Page.....	248
Understanding 360-Degree View Search Pages.....	248
Pages Used to Configure the 360-Degree Search Page.....	249
Defining User Links That Appear On the Search Page.....	249
Selecting the Search Page That Is Used to Access the 360-Degree View.....	251

Chapter 18

Using the 360-Degree View.....	253
Understanding the 360-Degree View.....	253
360-Degree Views.....	253
The 360-Degree View Toolbar.....	255
Accessing the 360-Degree View.....	256
Page Used to Access the 360-Degree View.....	257

Searching for Business Objects in the 360-Degree View.....	257
Managing Overall Activity for a Business Object.....	259
Pages Used to Manage Overall Activity for a Business Object.....	259
Managing Overall Activity for a Business Object.....	259
Personalizing Date Filters.....	262
Viewing Customer Relationships.....	262
Maintaining Customer Tasks.....	262

Part 5

Self-Service for Customers

Chapter 19

Setting Up Customer Self-Service.....	265
Understanding Customer Self-Service Setup.....	265
Self-Service Sites.....	265
Self-Service User Registration.....	266
Contact Us Notifications.....	267
Product Registration.....	267
Setting Up Guest IDs to Access Self-Service Sites.....	268
Defining Guest IDs.....	268
Changing the Label of the Guest ID Selection Field.....	269
Setting Up Contact Us Features.....	269
Prerequisites.....	270
Pages Used to Set Up Contact Us Features.....	270
Specifying Chat Features for Contact Us Pages.....	270
Defining Topics.....	271
Defining Contact Us Subjects and Workflow.....	271
Setting Up Product Registration.....	272
Pages Used to Set Up Product Registration for Self-Service Users.....	272
Configuring Installed Product Registration.....	272

Chapter 20

Working with Customer Self-Service Transactions.....	275
Understanding Customer Self-Service.....	275
Signing In to PeopleSoft CRM Self-Service.....	276
Pages Used to Sign In to PeopleSoft CRM Self-Service.....	276
Signing In to PeopleSoft CRM Self-Service.....	276

Requesting New Passwords.....	278
Completing Requests for New Passwords.....	278
Registering As Personal or Business Users.....	278
Pages Used to Register As Personal or Business Users.....	279
Registering As a Personal User.....	279
Identifying Companies for Business User Registration.....	280
Registering As a Business User.....	281
Registering as an Existing Customer.....	281
Reviewing Registration Information.....	281
Selecting the Customers That Business Users Represent.....	282
Page Used to Select the Customers That Business Users Represent.....	282
Selecting Customers for the Current Session.....	282
Maintaining Name and Sign-In Information.....	282
Pages Used to Maintain Name and Sign-In Information.....	283
Reviewing Name and Sign-In Information.....	283
Maintaining Contact Information.....	284
Pages Used to Maintain Contact Information.....	285
Accessing Default Address Information.....	285
Updating Primary Contact Information.....	285
Maintaining Contact Address Books.....	286
Pages Used to Maintain Contact Address Books.....	287
Reviewing Customer Addresses.....	288
Reviewing Customer Contacts.....	289
Reviewing Customer Primary Information.....	290
Creating Contact Addresses.....	291
Creating Customer Contacts.....	292
Selecting Existing Contacts.....	293
Selecting Existing Addresses.....	293
Maintaining Name, Role Information, and Relationship Address for Customer Contacts.....	294
Updating Customer or Contact Addresses.....	295
Maintaining Consumer Contact and Address Information.....	295
Pages Used to Maintain Consumer Contact and Address Information.....	296
Maintaining Consumer Address Books.....	296
Pages Used to Maintain Consumer Addresses Books.....	297
Viewing Consumer Addresses.....	297
Deleting Consumer Addresses.....	297
Viewing Internal Contacts.....	298
Page Used to View Internal Contacts.....	298
Sending Contact Us Messages.....	298
Page Used to Send Contact Us Messages.....	298

Sending Contact Us Messages.....	298
Registering Products.....	300
Pages Used to Register Products.....	300
Registering Products.....	300
Entering Product Registration Information.....	301

Part 6

Relationship Management

Chapter 21

Working with Contacts.....	305
Understanding Contact Management.....	305
Managing Contacts.....	306
Pages Used to Manage Contacts.....	306
Accessing Contacts.....	307
Adding Existing Contacts to the Contacts List.....	310
Adding Contacts to the System.....	311
Maintaining Contact Groups.....	312
Pages Used to Maintain Contact Groups.....	312
Managing Contact Groups.....	312
Adding or Removing Contacts of a Contact Group.....	313
Maintaining Groups and Group Membership.....	313
Searching for Contacts.....	314
Working with Call Reports.....	315
Pages Used to Work with Call Reports.....	315
Adding Call Reports.....	315
Viewing Call Report Lists.....	317

Chapter 22

Working with Tasks.....	319
Understanding Task Management.....	319
Setting Up Task Management.....	322
Pages Used to Set Up Task Management.....	322
Defining Task Types.....	322
Defining Task Priorities.....	324
Defining Task Group Templates.....	325
Managing Tasks.....	326

Common Elements Used in this Section.....	326
Pages Used to Manage Tasks.....	326
Viewing Task Lists.....	326
Creating Tasks or Updating Task Details.....	328
Viewing or Updating Task Notes.....	331
Linking Transactions to a Task.....	331
Viewing Calendars.....	332
Pages Used to View Calendars.....	332
Viewing or Updating Calendars.....	332
Viewing Another Person's Calendars.....	332
Managing Meetings.....	333
Page Used to Manage Meetings.....	333
Viewing Meetings.....	334

Part 7 Entitlement Management

Chapter 23

Setting Up and Managing Agreements and Warranties.....	337
Understanding Agreements and Warranties.....	337
Common Elements Used in This Chapter.....	337
Agreements and Warranties	338
Understanding Agreement Pricing.....	340
Pricing Record Retrieval.....	341
Line Price Calculations.....	341
Total Price Calculations.....	342
Price Recalculations.....	342
Understanding How Agreements and Entitlements are Used in PeopleSoft Order Capture.....	342
Defining Service Levels.....	343
Understanding Service Levels.....	343
Page Used to Define Service Levels	344
Defining Service Levels.....	344
Create Additional Cost Categories for the Service Level.....	345
Defining Entitlements.....	346
Understanding Entitlements.....	346
Page Used to Define Entitlements.....	346
Defining Entitlements.....	346
Defining Entitlement Plans.....	348

Understanding Entitlement Plans.....	348
Page Used to Define Entitlement Plans.....	349
Defining Entitlement Plans.....	349
Configuring the CRM System for Agreement Searches.....	349
Understanding Agreement Searches.....	350
Page Used to Configure Agreement Searches.....	350
Configuring Agreement Searches.....	350
Defining Agreement Templates.....	352
Understanding Agreement Templates.....	352
Pages Used to Define Agreement Templates.....	352
Defining Basic Header and Billing Information for Agreement Templates.....	352
Defining Default Entitlement Sets.....	354
Defining Default Agreement Lines.....	355
Viewing and Accessing Linked Product Definitions.....	357
Defining Agreements.....	358
Understanding Agreement Definitions.....	358
Pages Used to Define Agreements.....	359
Defining Agreement Header Information.....	359
Specifying People or Sites That Are Entitled to Service or Support.....	363
Specifying Default Entitlements.....	364
Defining Detailed Agreement Line Information.....	366
Defining Billing Information.....	374
Defining Warranties.....	377
Understanding Warranty Definitions.....	377
Page Used to Define Warranties.....	378
Defining Warranties.....	378
Generating Sales Leads for Agreement Renewal.....	380
Understanding Lead Generation for Agreement Renewal.....	380
Setting Up Lead Generation for Agreement Renewal.....	381
Pages Used to Set Up Lead Generation for Agreement Renewal.....	382
Defining Lead Time for Generating Leads.....	382
Generating Leads for Expiring Agreements.....	382
Accessing Leads That Are Generated for Agreements.....	382

Chapter 24

Defining Pricing Information for Services and Support Offerings.....	385
Establishing Pricing Records.....	385
Understanding Pricing Records.....	385
Page Used to Establish Pricing Records.....	388

Establishing Pricing Records.....	388
-----------------------------------	-----

Chapter 25

Performing Entitlement Searches for Cases and Service Orders.....	391
Understanding Entitlement Searches.....	391
Performing Entitlement Searches.....	395
Pages Used to Perform Entitlement Searches	395
Searching for and Viewing Warranties and Agreements.....	396

Part 8 SmartViews

Chapter 26

Setting Up SmartViews.....	401
Understanding SmartViews.....	401
Overview of the SmartView Framework.....	401
Use of Templates.....	402
Metrics and Terms.....	403
Data Storage.....	404
Audiences and Segment Groups.....	404
SmartViews Security.....	406
Setting Up SmartViews.....	407
Pages Used to Set Up SmartViews.....	408
Defining System Data.....	408
Defining Metrics.....	409
Specifying Time Frames for Metric Updates.....	410
Defining SmartView Templates.....	411
Generating Audiences.....	412
Scheduling Processes for Caching SmartView Data.....	413
Viewing Scheduled Update Results.....	414

Chapter 27

Working with SmartViews.....	417
Working with SmartViews.....	417
Pages Used to Work with SmartViews.....	418
Viewing the SmartView.....	418

Configuring SmartViews.....	422
Personalizing Templates for Display.....	423
Configuring Display Options for Historical Data.....	424

Appendix A

Managing PeopleSoft Customer Relationship Management Integration Points.....	427
Understanding PeopleSoft CRM Integration Points.....	427
Processing PeopleSoft Business Interlinks Transactions.....	427
Processing Inbound Application Message Transactions.....	429
Understanding the Inbound Transaction Architecture.....	429
Using Inbound Transactions.....	431
Processing Outbound Application Message Transactions.....	440
Understanding the Outbound Transaction Architecture.....	440
Using Outbound Transactions.....	441
Setting Up Chunking.....	469
Understanding Chunking.....	470
Pages Used to Set Up Chunking.....	471
Publishing Outbound Messages.....	472
Page Used to Publish Outbound Messages.....	473
Publishing Outbound Messages.....	473

Appendix B

ISO Country and Currency Codes.....	475
ISO Country Codes.....	475
ISO Currency Codes.....	484

Glossary of PeopleSoft Terms.....	495
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Index	511
--------------------	------------

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>

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See Also

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

Typographical Conventions and Visual Cues

This section discusses:

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

Typographical Conventions

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

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

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

Visual Cues

PeopleBooks contain the following visual cues.

Notes

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

Note. Example of a note.

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

Important! Example of an important note.

Warnings

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

Warning! Example of a warning.

Cross-References

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

Country, Region, and Industry Identifiers

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

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

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

Country Identifiers

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

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

Region Identifiers

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

- Asia Pacific
- Europe
- Latin America
- North America

Industry Identifiers

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

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

Currency Codes

Monetary amounts are identified by the ISO currency code.

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

Comments and Suggestions

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

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

Or send email comments to doc@peoplesoft.com.

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

Common Elements in These PeopleBooks

As of Date	The last date for which a report or process includes data.
Business Unit	An ID that represents a high-level organization of business information. You can use a business unit to define regional or departmental units within a larger organization.
Description	Enter up to 30 characters of text.
Effective Date	The date on which a table row becomes effective; the date that an action begins. For example, to close out a ledger on June 30, the effective date for the ledger closing would be July 1. This date also determines when

you can view and change the information. Pages or panels and batch processes that use the information use the current row.

Once, Always, and Don't Run

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

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

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

Report Manager

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

Process Monitor

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

Run

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

Request ID

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

User ID

An ID that represents the person who generates a transaction.

SetID

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

Short Description

Enter up to 15 characters of text.

PeopleSoft Enterprise Customer Relationship Management Application Fundamentals Preface

This preface discusses:

- Additional resources.
- PeopleSoft Enterprise Customer Relationship Management (CRM) business object management.
- PeopleSoft Enterprise CRM product and item management.
- PeopleSoft Enterprise CRM automation and configuration tools.
- PeopleSoft Enterprise CRM services foundation.
- 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 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 Enterprise CRM Product and Item Management

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

See Also

PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook

PeopleSoft CRM Automation and Configuration Tools

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

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

- Correspondence Management.

This part discusses notifications and correspondence requests.

- Automation Tools.

This part discusses PeopleSoft CRM workflow, the active analytic framework (AAF), and scripts.

- Configuration Tools.

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

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook

PeopleSoft CRM Services Foundation

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

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

- Entitlement Management.

Entitlement management enables users to manage agreements and warranties.

- Solution Management.

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

- Time Management.

Time management enables users to log time for the work performed on service order lines and cases.

- Environmental Systems Research Institute (ESRI) integration.

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

See Also

PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook

PeopleTools PeopleBooks

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

PART 1

Getting Started

Chapter 1

**Getting Started with PeopleSoft Enterprise Customer Relationship Management
8.9 Applications**

CHAPTER 1

Getting Started with PeopleSoft Enterprise Customer Relationship Management 8.9 Applications

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

- PeopleSoft CRM cross-product integrations.
- PeopleSoft CRM cross-product implementation.

PeopleSoft Enterprise CRM 8.9 Application Fundamentals Overview

This book contains essential information describing the setup and design of PeopleSoft CRM and the use of features that are common to multiple applications within PeopleSoft CRM, including information on:

- Setting up installation, basic system tables, and security options.
- Setting up and using features that are common to multiple PeopleSoft CRM applications, such as notes, search collections, alternate character, interactive reports, and diagnostic reports.
- Administering worker information.
- Setting up and using interactions and 360-degree views.
- Setting up and using self-service applications.
- Managing relationships with customers.
- Setting up agreements and warranties.
- Managing the portfolio of products that you offer.

Note. This book documents the mechanics of setting up and using common PeopleSoft CRM functionality. The use of that functionality within business process, such as order capture or support, is discussed in the application PeopleBook.

See Also

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook

PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook

PeopleSoft Enterprise CRM 8.9 Cross-Product Integrations

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

- Integration with PeopleSoft Human Resources Management or other similar systems enables you to synchronize CRM employee records with the system of record for human resources data.
- Integration with PeopleSoft Supply Chain Management (SCM) or other similar systems enables you to synchronize customer and product data across systems, which enables many transactions within PeopleSoft CRM, such as manage materials in PeopleSoft Integrated FieldService and PeopleSoft Support and order taking and tracking in PeopleSoft Order Capture.
- Integration with PeopleSoft SCM and Financial Management Solutions enables you to display billing information and payment information that is associated with customers in the PeopleSoft CRM 360-Degree View.
- Integration with the PeopleSoft business analysis modeler enables you to view real-time multidimensional interactive reports that help you analyze and monitor the key performance indicators in your enterprise.
- Integrations that enable the PeopleSoft CRM system to exchange customers with personal information managers such as Microsoft Outlook or Lotus Notes.
- The Credit Card EIP (enterprise integration point) enables you to integrate with third-party credit card authorization and payment vendors in PeopleSoft Support and the PeopleSoft collaborative selling applications.

Refer to the implementation chapters in this PeopleBook for detailed information.

PeopleSoft Enterprise CRM 8.9 Applications Implementation

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

- A list of components that you must set up.

This list is the order in which you must setup the components and enter data into them

- Links to the corresponding PeopleBook documentation.

Other Sources of Information

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

See Also

Preface

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Component Interfaces

PeopleSoft Enterprise Setup Manager for Customer Relationship Management 8.9 PeopleBook

PART 2

CRM Multi-Product Foundation

Chapter 2

Working with Business Units and TableSet Controls

Chapter 3

Setting Up General Options

Chapter 4

Setting Up PeopleSoft Customer Relationship Management Security and User Preferences

Chapter 5

Working with Notes and Attachments

Chapter 6

Using Interactive Reports

Chapter 7

Setting Up Currencies

Chapter 8

Implementing Alternate Character

Chapter 9

Setting Up Auditing for Cases and Inbound Email

Chapter 10

Running Diagnostic Reports

CHAPTER 2

Working with Business Units and TableSet Controls

This chapter provides overviews of business units and TableSet controls in PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM) and discusses how to define TableSet controls.

Understanding Business Units in PeopleSoft Enterprise CRM

This section discusses:

- Business unit structure.
- Uses of business units in PeopleSoft Enterprise CRM.

Business Unit Structure

A business unit represents an operational entity for an application. The structure of a business unit depends on the requirements of the PeopleSoft Enterprise CRM application in which the business unit is defined. For example, you might structure a sales organization (and thus the PeopleSoft Sales CRM business units) on region lines but structure a support organization (and thus the PeopleSoft Support CRM business units) around different product lines.

Using business units enables you to group transactions for reporting purposes. Business units do not have predetermined restrictions or requirements. You can define business units to reflect departmental functionality, along product lines, or by location. An entire organization might have only one business unit if every department uses the same processing rules. Diversified companies, such as those that have multiple cost centers, divisions, or subsidiaries, usually have multiple business units.

PeopleSoft does not deliver predefined business units. You decide how to implement business units in PeopleSoft applications to reflect the structure of the enterprise. Business units are usually specific to individual applications: for example, you set up field service business units for the PeopleSoft Field Service application and Sales business units for the PeopleSoft Sales application. However, some applications can share business units. For example, PeopleSoft Support and PeopleSoft Help Desk are both call center applications and can use the same business unit because the nature of their applications is similar.

You can also relate business units across integrated applications. For example, you can associate call center business units with field service business units for service order integration and with sales business units for sales lead integration.

Warning! After you define a structure, you cannot delete a business unit—you can only inactivate it. Before creating and securing business units, think carefully about how you want to set up the organizational structure and about what information you want groups of users to access.

Uses of Business Units in PeopleSoft Enterprise CRM

Transactional data in PeopleSoft Enterprise CRM is associated with business units. For example, leads belong to PeopleSoft Sales business units, and service orders belong to PeopleSoft Field Service business units.

Business units can control the following types of processing:

- **Business logic.**

Some features are enabled and disabled at the business unit level rather than at the application level. For example, PeopleSoft Field Service enables automatic receiving by business unit.

- **Reporting and analysis.**

You can report and summarize information by business unit. For example, several reports that are in PeopleSoft Support and PeopleSoft HelpDesk filter data based on business unit.

- **Default values.**

Values often appear by default for every transaction that is associated with a business unit. For example, the currency value appears by default for each Sales business unit.

- **Filtering of values for prompt fields.**

Prompt fields on PeopleSoft transactions components are often populated differently based on business unit. For example, in PeopleSoft Support you might set up one business unit to handle software issues and another to handle hardware issues. The values that are available to each business unit for the case type and product fields differ depending on whether the business unit that handles the case is set up for software or hardware cases.

- **Security.**

Business units enable you to control row-level security. You can control access to setIDs by user or permission list.

See [Chapter 4, “Setting Up PeopleSoft Customer Relationship Management Security and User Preferences,” Setting System-Wide Security Options, page 56.](#)

Use of Business Units by CRM Applications

You can use the same business unit across applications. You create the business unit in one application, then use each application’s setup component to associate the business unit with each application that uses the business unit.

See [Chapter 2, “Working with Business Units and TableSet Controls,” Defining Business Units and TableSet Controls, page 13.](#)

See Also

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook

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

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

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

PeopleSoft Enterprise Sales 8.9 PeopleBook, “Setting Up Business Units for PeopleSoft Sales”

Understanding TableSet Controls in PeopleSoft Enterprise CRM

This section discusses:

- TableSet control terminology
- TableSet control scenarios
- TableSet control example

TableSet Control Terminology

The TableSet control architecture uses the following terminology:

TableSet

TableSets are groups of control tables that enable you to share the same control values among multiple business units. This reduces data redundancy by enabling multiple business units to access shared information while keeping information such as departments decentralized. You can use business units and TableSets to associate a business unit with individuals in the enterprise or to specify default values for a business unit's transactions.

TableSets also enable you to limit data access by associating the business unit with a list of record groups, each of which is associated with a setID. The setID in turn is associated with one or more values that are in a control table.

SetID

SetIDs are the labels that identify a TableSet. SetID functionality in PeopleSoft Enterprise CRM provides a higher business level for rollup of business unit data in reports and for other purposes. Just as business units organize the company or organization, setIDs organize data within the system.

Business units are used to group and filter transactions, and setIDs are used to group and filter the setup data. To create logical groupings of values, you associate setIDs with each value.

For example, you might have two call center business units, one for U.S. operations and one for European operations. If you sell different products in the U.S. and Europe, then you use two setIDs with the products: one for U.S. products, and one for European products. You can associate these different product setIDs with the two call center business units to ensure that call center agents in each geographic region see only products that are sold in that region. You can also use setIDs to group the different case types that are handled by the call centers.

Some PeopleSoft tables (control tables and prompt tables) use a setID as a high-level key to identify and retrieve data from system databases. The setID segregates the data in the control tables, which enables many business units to share the same set of data on the physical table in the system by grouping values for filtering purposes.

SetIDs are shared across applications. For example, all PeopleSoft Enterprise CRM business units have TableSet controls that determine valid products for each business unit. Therefore, when you establish product setIDs, you need to consider how products appear in each PeopleSoft Enterprise CRM application that you plan to implement.

Control (or Setup) Table

Control tables enable you to establish values for fields that are in transactional pages. For example, the Case Type control table contains all the valid case types. When a support agent opens a case, the Case Types table supplies the list of valid types from which the support agent can select.

Record Group

Record groups contain similar setup tables. For example, some record groups are specific to call center setup tables. There is one record group for the tables that contain problem attributes (case type, category, and so forth), another record group for tables that contain impact attributes (priority and severity), and so on. Additional record groups control setup tables (for example, products and solutions) that are shared with other applications.

Setup components in the same record group must use the same setID for a given business unit. For example, suppose you have two different business units with two different setIDs and you also want to separate case type by setID. Because case type is in record group RC-03 and category, type, and details are also in that record group, you must also assign different setIDs for category, type, and details if you have different setIDs for different case types.

When a record is in a given record group, views that contain the record are also in the record group if the views are keyed by setID. Related language records do not necessarily appear in the record group.

PeopleSoft-delivered setup tables are already organized into record groups. Not all record groups are relevant to all business units. For example, case attribute record groups are relevant to call center business units, but not to sales business units. You can look at the TableSet definition for an existing business unit to see which record groups are used by which application.

TableSet Controls

TableSet controls associate business units with record groups and setIDs. Each business unit has its own TableSet control, which is stored on the TableSet Record Group Control table. You can associate a setID for each individual record group to a business unit.

You can use either a business unit or a setID to set up PeopleSoft Enterprise CRM TableSet controls. For example, if you are in the product component (in which case, the underlying record is keyed by setID) and you prompt on a field that is also keyed by setID, PeopleTools actually looks for the setID of the prompt record by passing in the product setID.

Note. The pages where you set up and review setIDs, record groups, and TableSet controls are part of PeopleTools. Because PeopleTools supports TableSet controls based on attributes other than business unit, the PeopleTools documentation uses the generic term set control field.

Since PeopleTools doesn't always use business unit, it is important that you set up both the setID and the business unit.

See Also

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Application Designer

TableSet Control Scenarios

Not every organization needs to use the more complex TableSet control capabilities. Consider these scenarios as you decide how to use TableSet controls:

- You have only one business unit.

All of the setup data is valid for that business unit. Therefore, you only need one setID. When you create the business unit, specify this setID as the default. The system creates the TableSet control.

- Multiple business units use all the same setup data.

All of the setup data is valid for all business units. Therefore, you still only need one setID. When you create business units, specify this setID as the default for all business units, and the system creates TableSet controls.

- Multiple business units use separate sets of setup data.

In this scenario, you have one set of setup data for each business unit. Therefore, you need one setID per business unit. As you create each business unit, you specify its default setID. Once again, the system creates TableSet controls for you.

- Multiple business units use some shared setup data and some unique setup data.

This is the only scenario in which you have to configure the TableSet controls. The business units use different setIDs for different record groups, and therefore the default setID is not valid for all record groups. You still specify a default setID when you create each business unit, but you must override the default later.

TableSet Control Example

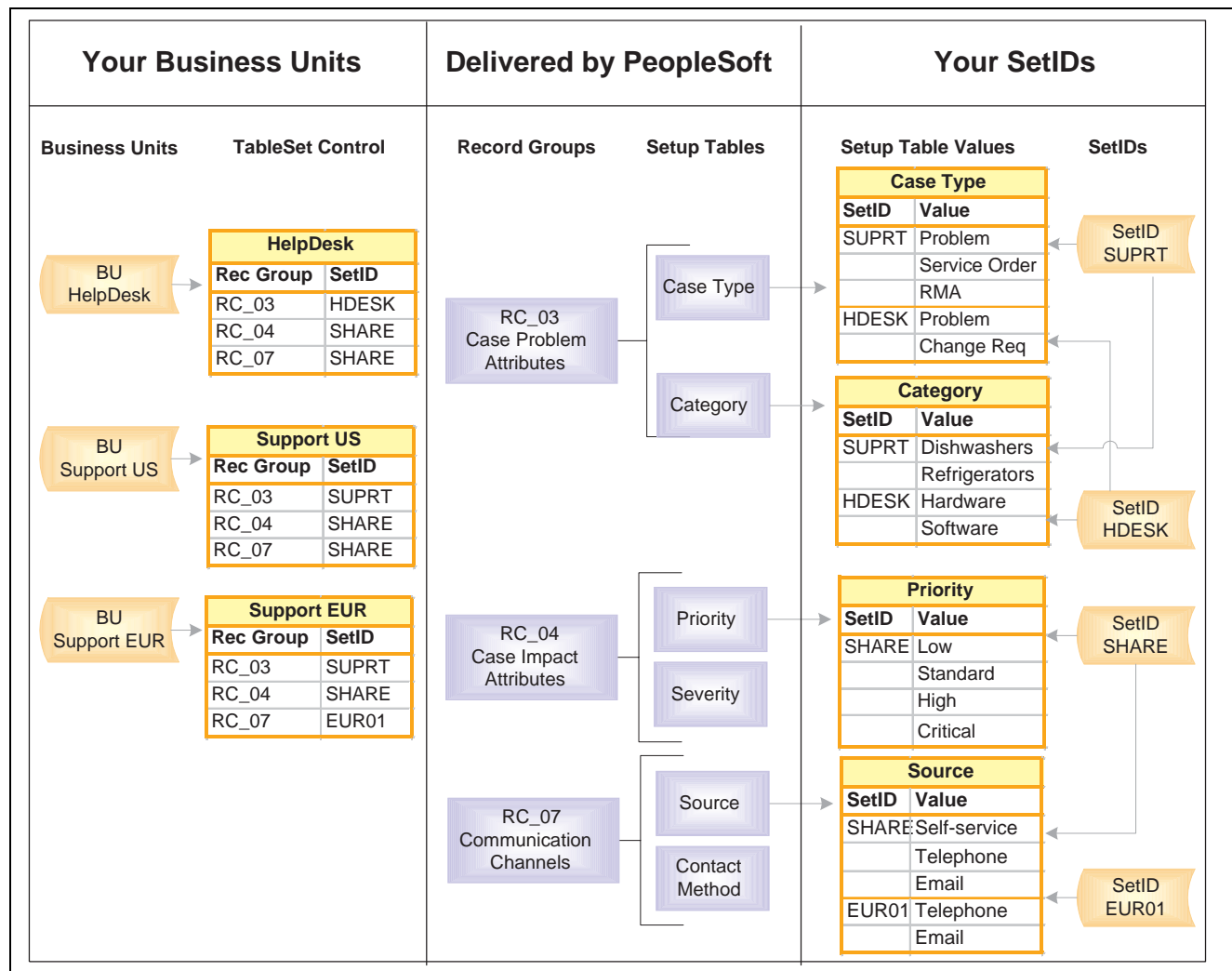
The following diagram illustrates the most complex TableSet control scenario: multiple business units use some shared setup data and some unique setup data.

The diagram represents the business units and setIDs that are established by an organization with three call center business units, one for its U.S.-based help desk operations, one for its U.S. support operations, and one for its European support operations.

The organization has these requirements for sharing setup data:

- There are two sets of case problem attributes (record group RC_03): one for the two support business units and one for the help desk business unit.
- There is one set of case impact attributes (record group RC_04); all three business units share the values.
- There are two sets of communication channel attributes (record group RC_07): one set for the U.S.-based business units and one for the European business unit.

This diagram illustrates the tables that manage the relationship between business units, record groups, and setIDs:



Business units, setIDs, and TableSet controls

Notice the following details in the diagram:

- Values that are valid for more than one setID are entered for each setID for which they are valid.

For example, both the help desk business unit and the support business units have a case type of *Problem*. The different business units cannot share this value because they are associated with different setIDs. Therefore, the problem case type is set up twice in the Case Type table: once under the HDESK setID, and once under the SUPRT setID.

Setting up case types is simple, involving only a setID, a unique identifier, and descriptive information. But for more complex setup tables (for example, the product table), duplicate data becomes difficult to maintain. The more complex the setup tables are, the more you have to gain by sharing values across business units.

- The Case Type table is part of the record group for case problem attributes (RC_03). Therefore, the values for all tables that are in the RC_03 record group are split into help desk values (associated with the HDESK setID) and support values (associated with the SUPRT setID).
- The preceding diagram illustrates two different ways of handling setIDs when values are shared by some, but not all, business units:
 - You can have setIDs that correspond to the specific groups of values, as the setup for the record group for case problem attributes (RC_03) illustrates: there is one setID for the support business unit and another setID for the help desk business unit.

- You can use a general-purpose setID, such as SHARE, for shared values and use other setIDs on an exception basis, as the setup for the communication channels record group (RC_07) illustrates.
- The system uses the default SETID table to determine default values for the setIDs that are associated with each record group in a new business unit. For example, a setID US100 might use US100 for most setIDs but use SHARE for departments. If you define US100 as the default setID for the a new business unit, then the new business unit also uses US100 for all setIDs except departments, for which it uses SHARE.

Defining Business Units and TableSet Controls

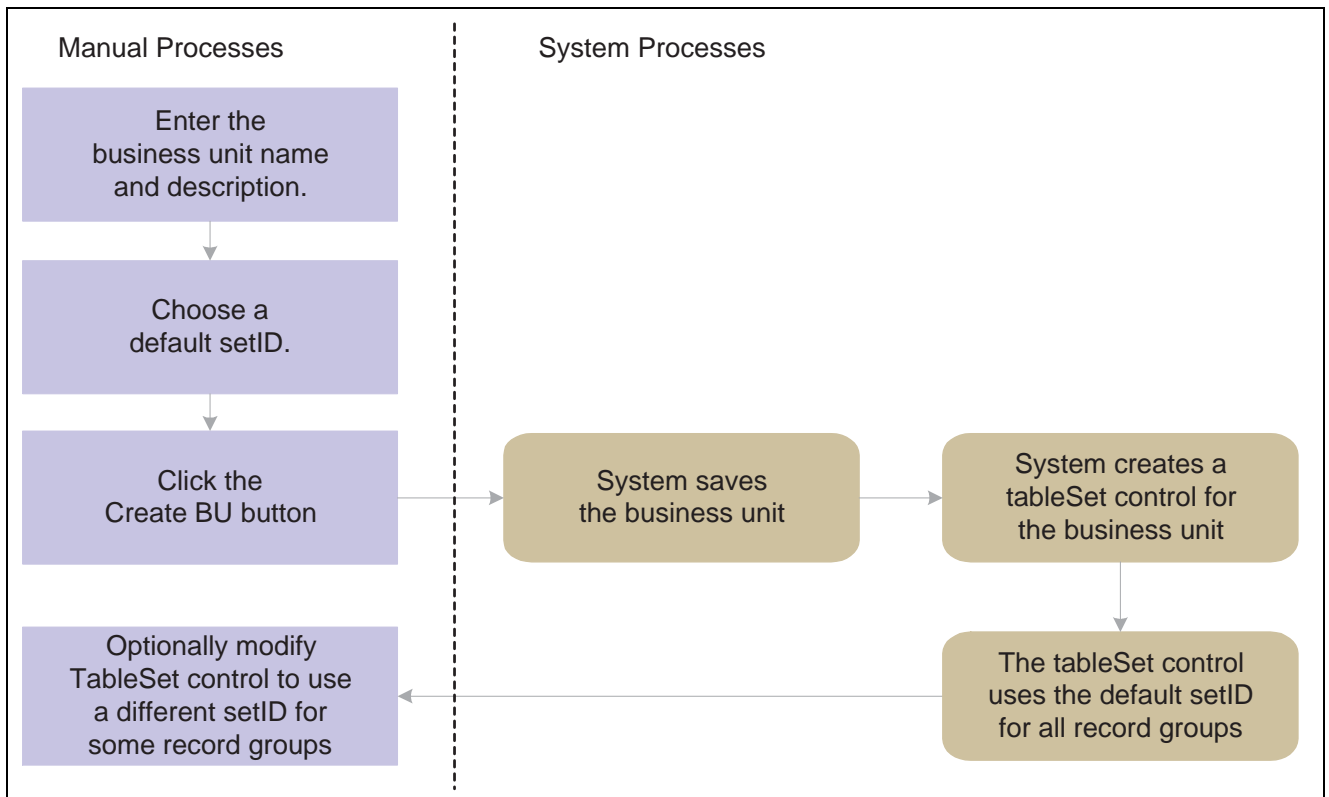
To define tablesets, use the TableSet ID (SETID_TABLE) component.

This section provides an overview of the TableSet control setup process and lists the pages used to define TableSet controls.

TableSet Control Setup

When you create a new business unit, the system creates a setID with the same name as the business unit. The newly created TableSet control associates all record groups with that setID. This is a convenient shortcut when you have multiple business units with identical or similar TableSet controls.

This diagram illustrates the TableSet control setup process.



TableSet control setup process

To define a business unit's TableSet control:

1. Create the business unit on the appropriate application-specific page.

The system creates a default setID corresponding to the business unit name.

If the business unit uses only its default setID, you are finished; continue to the next step only if the business unit uses setIDs that are other than its defaults.

2. Use the TableSet Control page to create additional setIDs.
3. Use the Record Group page (in the TableSet Control component) to map setIDs to record groups.

If necessary, use the Record Group page (in the Record Group component) to review which records are in each record group.

In addition to setting up business units and setIDs, you must set up appropriate security.

See Chapter 4, “Setting Up PeopleSoft Customer Relationship Management Security and User Preferences,” page 39.

Note. The pages where you set up and review setIDs, record groups, and TableSet controls are part of PeopleTools. Because PeopleTools supports TableSet controls based on attributes other than business unit, the PeopleTools documentation uses the generic term *set control field*.

You can use either a business unit or a setID to set up PeopleSoft Enterprise CRM TableSet controls. For example, if you are in the product component (in which case, the underlying record is keyed by setID) and you prompt on a field that is also keyed by setID, PeopleTools actually looks for the setID of the prompt record by passing in the product setID.

Since PeopleTools doesn't always use business unit, it is important that you set up both the setID and the business unit.

See Also

PeopleSoft Application Designer

PeopleSoft Administration Tools

Pages Used to Define Business Units and TableSet Controls

Page Name	Object Name	Navigation	Usage
Call Center Definition	BUS_UNIT_RC1	Set Up CRM, Business Unit Related, Call Center Definition, Call Center Definition	Create a call center business unit and its default setID.
FieldService Definition	BUS_UNIT_RF1	Set Up CRM, Business Unit Related, FieldService Definition, FieldService Definition	Create a field service business unit and its default setID.
Marketing Definition	RA_BUS_UNIT_TBL	Set Up CRM, Business Unit Related, Marketing Definition, Marketing Definition	Create a marketing business unit and its default setID.
Order Capture Definition	BUS_UNIT_RO1	Set Up CRM, Business Unit Related, Order Capture Definition, Order Capture Definition	Create an order capture business unit and its default setID.
Quality Definition	RQ_BUS_UNIT_TBL	Set Up CRM, Business Unit Related, Quality Definition, Quality Definition	Create a quality business unit and its default setID.
Sales Definition	RSF_BUS_UNIT_TBL	Set Up CRM, Business Unit Related, Sales Definition, Sales Definition	Create a sales business unit and its default setID.
Change Management Definition	BUS_UNIT_TBL_RG	Set Up CRM, Business Unit Related, Change Management Definition, Change Management Definition	Create a change management business unit and its default setID.
Change Management Definition	BUS_UNIT_TBL_RY	Set Up CRM, Business Unit Related, Dialog Definition, Dialogs Definition	Create a change management business unit and its default setID.
TableSet Control	SETID_TABLE	PeopleTools, Utilities, Administration, TableSet IDs, TableSet Control	Create a setID.
Record Group	SET_CNTRL_TABLE1	PeopleTools, Utilities, Administration, TableSet Control, Record Group	Review and modify a business unit's TableSet control (which setID is used for which record group).
Record Group	REC_GROUP_TABLE	PeopleTools, Utilities, Administration, Record Group, Record Group	Review the records that are included in a record group.

CHAPTER 3

Setting Up General Options

This chapter provides an overview of PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM) general options and discusses how to:

- Set up automatic numbering rules.
- Set up PeopleSoft Enterprise CRM application installation options.
- Set up regions.
- Set up locations.
- Set up salutation codes.
- Define alpha indexes.
- Set up payment terms.
- Set up data archiving.

Understanding PeopleSoft Enterprise CRM General Options

This section discusses:

- Automatic numbering.
- Installation options.
- Regions.

PeopleSoft Enterprise CRM general options are the basic control values that apply to multiple PeopleSoft Enterprise CRM applications.

Automatic Numbering

The system can automatically generate unique numeric identifiers for many PeopleSoft Enterprise CRM objects by tracking the last number used and increasing the number by one for each new object. Autonumbers come from several sources: autonumbering rules, last numbers, and PeopleTools global unique identifiers (PeopleTools GUIDs).

If you need to autonumber in increments that are greater than one, use the `getNextNumberWithGapsCommit()` function.

Autonumbering Rules

When you set up autonumbering rules, specify number prefixes and set the length of the identifier. You can use different rules for different setIDs or business units.

Depending on how you set up autonumbering, duplication of numbers between business units can occur. For example, suppose that you use PeopleSoft Computer/Telephony Integration (PeopleSoft CTI) and callers key in a number, such as a service order ID, that is generated through autonumbering rules; you must set up autonumbering to ensure that the number is unique across all business units.

To review which objects use autonumbering rules, review the number types that you can select on the Auto Numbering page.

See [Chapter 3, “Setting Up General Options,” Setting Up Automatic Numbering Rules, page 20](#).

SetIDs and Autonumbering

Certain objects that are not keyed by business unit or setID are hard-coded to use rules that are set up under the SHARE or NONE setIDs. In this case, if you set up an autonumbering rule for any of these objects (for example, person ID) under a regular setID (for example, CRM01), the system uses the rule of the setID that is hard coded to this object when it assigns the next number to a new record. As a result, the autonumbering rule of the NONE setID, not CRM01, is used.

The following types of objects are hard coded to use the SHARE setID:

- Lead ID
- Opportunity ID

These global objects are hard-coded to use the NONE setID:

- Attribute Group ID
- Person ID
- ADDR (address ID)

These PeopleSoft Banking Transactions and PeopleSoft Bill Presentment and Account Management objects are hard coded to use the NONE setID:

- Alternate Capacity ID
- Application Form Instance ID
- Bill Amount ID
- Bill Payee ID
- FSI Location Service ID
- FSI Sales Entry ID
- Ibank Transaction ID
- Partnership ID
- Security Trace ID

These PeopleSoft Enterprise CRM objects are hard-coded to use the NONE setID:

- Balance ID for Account Balance
- Bill IDs for Telco Bills
- Item ID for a Bill
- Event ID for a Bill

Last Numbers

Enter only the last number that the system uses to create new identifiers. For each object that uses this method, PeopleSoft delivers a row of data in the Last Number table (PS_AUTO_NUM_TBL). You can review the data and change the starting number, but that is the only necessary setup.

Numbers are not associated with setIDs, which means that the numbers are guaranteed unique across the system.

To review which objects use last numbers, review the data that appears on the Last Numbers page.

See [Chapter 3, “Setting Up General Options,” Specifying Last Numbers, page 21.](#)

Last Number Types

PeopleSoft delivers PeopleSoft Enterprise CRM with a set of last number types and a predefined Last Number table which includes the last number types that are required for the core PeopleSoft Enterprise CRM applications. When you add PeopleSoft Enterprise CRM applications for specific vertical markets, you must add last number types for objects used by those applications to avoid system errors that result from the object having no entry in the Last Number table.

For example, the following error might occur:

```
While trying to create the Time Header record, an error has occurred. If the
RC_CASE.BUSINESS_UNIT.SavePreChange (Record PeopleCode).
```

To resolve this error, add the last number type, TIME_SHEET_ID, for the SHARE setID (or the specific setID that you have defined).

PeopleTools GUIDs

GUIDs are used only where the number is not visible online; there is no setup associated with these objects. For instance, business object IDs use GUIDs.

Installation Options

Installation options include system settings for PeopleSoft Enterprise CRM products that you installed. The system options that you set determine:

- Which PeopleSoft Enterprise CRM products you are using.
- Defaults for system options and data, such as country, market, and exchange rate calculations.

See [Chapter 7, “Setting Up Currencies,” Calculating Currency Exchange, page 130.](#)

- The standard work week used to determine the start and end time of holidays and to determine worker availability for assignments.

See [Chapter 3, “Setting Up General Options,” Setting Calendar Options, page 25.](#)

- The character set that the system uses for languages whose symbols are not easily represented by a single-byte code.

See [Chapter 8, “Implementing Alternate Character,” page 133.](#)

- The business object that represents guest users or anonymous callers in the system.

See [Chapter 4, “Setting Up PeopleSoft Customer Relationship Management Security and User Preferences,” Setting Up Guest Users, page 87.](#)

- What data is available to Human Resources Help Desk.

See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, “Managing Enterprise Integration for PeopleSoft Enterprise CRM,” Understanding Enterprise Integration Technology.

- How different applications perform contractual pricing and billing.

See [Chapter 24, “Defining Pricing Information for Services and Support Offerings,” Establishing Pricing Records, page 385.](#)

Regions

You can associate regions with customer and worker addresses, provider groups (as part of the group assignment criteria), sales territories, product definitions, and (in PeopleSoft Phone Number Administration) with pools of telephone numbers.

See [Chapter 3, “Setting Up General Options,” Setting Up Regions, page 27.](#)

Setting Up Automatic Numbering

To set up automatic numbering, use the Automatic Numbering (AUTO_NUM_PNL) component.

This section discusses how to set up autonumbering rules.

Pages Used to Set Up Automatic Numbering Rules

Page Name	Object Name	Navigation	Usage
Auto Numbering	AUTO_NUM_PNL	Set Up CRM, Common Definitions, Codes and Auto Numbering, Automatic Numbering, Auto Numbering	Define automatic numbering for objects that use numbering rules.
Last Number Setup	RC_LAST_NBR_TYPE	Set Up CRM, Common Definitions, Codes and Auto Numbering, Last Numbers, Last Number Setup	Specify last numbers for objects that use last numbers in autonumbering.

Setting Up Automatic Numbering Rules

Access the Auto Numbering page.

Auto Numbering page

SetID

Displays the setID that controls the numbering rules. A few objects are hard coded to use either the SHARE or NONE setID.

See [Chapter 3, “Setting Up General Options,” Automatic Numbering, page 17.](#)

Number Type

Displays the type of object whose rules you are setting up or displaying.

Field Name

Displays the field where the number is stored—for most objects; this is the object identifier. The system enters the appropriate field name based on the number type

Length

Displays the length of the field, so that you are sure that the numbers that you generate are not too large for the field.

Start Seq (start sequence)

Enter a prefix that is placed in front of the number. The prefix can contain up to three alphanumeric characters.

Note. PeopleSoft CTI requires that all user inputs are either all numbers or all letters, but not a mix. Certain autonumbered fields that PeopleSoft CTI users enter (for example, IDs for orders, service orders, and customers) normally can contain a mix of numbers and letters, but if you use PeopleSoft CTI, give these fields autonumbering definitions that use just one or the other.

Max Length (maximum length)

Enter the maximum length of the number. This cannot exceed the length of the field.

Last Number Issued







Enter the last number issued. Automatic numbering begins with the next number.

Default?

Select to activate the associated autonumbering rule to use. If more than one row of autonumbering rules exists, you can activate only one.


Specifying Last Numbers

Access the Last Number Setup page.

Last Number Setup					
Last Number Types					
Object Type	*Description	*Record (Table) Name	*Field Name	Last Number	Test
ACTI	Branch Script Action	RC_BS_ACTION	RC_ACTION_ID	300,094	
ATCH	File Attachment	BC_ATTACH	ATTACH_SEQ_NBR	20,001	
BODI	Directory Setup	BO_DIR_SETUP	SEARCH_FIELD_ID	300,004	
BP	Business Project Instance	RC_BP_STATUS	BUS_PROC_INSTANCE	20,316	
BROL	Role	BO_ROLE	ROLE_TYPE_ID	20,018	
BRSC	Branch Script	RC_BSCRIPT	SCRIPT_ID	11,000,096	

Last Number Setup page

Note. Not all rows that appear on the Last Number Setup page appear here.

Object Type	Displays the objects for which you can set autonumbering. The installation process creates a row for each object whose numbering you manage on this page.
Record (Table) Name and Field Name	Enter the table and field name of the object.
Last Number	Enter the last identification number that is in use for this object. Automatic numbering begins with the next number. The numbers from 0 to 20000 are reserved for delivered data.
	Click Last Number Increment to increase the last number by one and test the autonumbering functionality.
Add a New Last Number Type	Click this button to select a new last number type from a list of last number types. When you add a last number type, you must specify values in the Object Type, Record(Table) Name, and Field Name with which it is associated.

Setting Up PeopleSoft Enterprise CRM Application Installation Options

To set up PeopleSoft Enterprise CRM Application Installation Options, use the Installation Options (RB_INSTALLATION) component.

This section discusses how to set up general and calendar options.

Pages Used to Set Up PeopleSoft Enterprise CRM Application Installation Options

Page Name	Object Name	Navigation	Usage
General Options	RB_INSTALLATION	Set Up CRM, Install, Installation Options, General Options	Set up the applications that you are using and enter other general options.
Calendar Options	RB_INSTALLATION	Set Up CRM, Install, Installation Options, Calendar Options	Set up the standard workday and workweek for the enterprise at the time of installation.
Alt Character	ALT_CHAR_PNL	Set Up CRM, Install, Installation Options, Alt Character	Set up the alternate characters that the system uses for a specific language code.
Anonymous Object	RB_ANON_BUS_OBJECT	Set Up CRM, Install, Installation Options, Anonymous Object	Set up an anonymous business object.
HRHD (Human Resource Help Desk) EIP (Enterprise Integration Point) Options	RC_HR_INSTALLATION	Set Up CRM, Install, Installation Options, HRHD EIP Options	Set up EIPs that support Human Resource Help Desk.
Billing and Pricing Options	RB_INTEGRATION	Set Up CRM, Install, Installation Options, Billing and Pricing Options	Select options for contractual billing and pricing.

Setting Up General Options

Access the General Options page.

General Options | Calendar Options | Alt Character | Anonymous Object | HRHD EIP Options

PeopleSoft Products

<input checked="" type="checkbox"/> Mobile Account Planning	<input checked="" type="checkbox"/> Order Capture
<input checked="" type="checkbox"/> Integrated FieldService	<input checked="" type="checkbox"/> Order Capture - Self Service
<input checked="" type="checkbox"/> Mobile Field Service	<input checked="" type="checkbox"/> Mobile Order Capture
<input checked="" type="checkbox"/> Support	<input checked="" type="checkbox"/> CRM Portal Pack
<input checked="" type="checkbox"/> Support-Customer Self Service	<input checked="" type="checkbox"/> Quality
<input checked="" type="checkbox"/> HelpDesk	<input checked="" type="checkbox"/> CTI Integration
<input checked="" type="checkbox"/> HelpDesk-Employee Self Service	<input checked="" type="checkbox"/> Multichannel Communication
<input checked="" type="checkbox"/> HelpDesk for Human Resources	<input checked="" type="checkbox"/> Partner Commerce
<input checked="" type="checkbox"/> Sales	<input checked="" type="checkbox"/> Partner Marketing
<input checked="" type="checkbox"/> Mobile Sales	<input checked="" type="checkbox"/> Partner Planning
<input checked="" type="checkbox"/> Sales Product Configurator	<input checked="" type="checkbox"/> Partner Platform
<input checked="" type="checkbox"/> Advanced Configurator	<input checked="" type="checkbox"/> Partner Sales
<input checked="" type="checkbox"/> Mobile Configurator	<input checked="" type="checkbox"/> Partner Service
<input checked="" type="checkbox"/> Strategic Account Planning	<input checked="" type="checkbox"/> Online Marketing
<input checked="" type="checkbox"/> Marketing	<input type="checkbox"/> Incentive Management
<input checked="" type="checkbox"/> Telemarketing	<input checked="" type="checkbox"/> Policy and Claims Presentment
<input checked="" type="checkbox"/> Real-Time Advisor	<input checked="" type="checkbox"/> Phone Number Administration
<input checked="" type="checkbox"/> Banking Transactions	<input checked="" type="checkbox"/> Portfolio Management
<input checked="" type="checkbox"/> Bill Presentment	<input checked="" type="checkbox"/> Services Management

General Options page (1 of 2)

General Options

Country United States

Exchange Rate Type Current Rate

Market

Agreement Renewal Lead Time Days

☐ Collector/Credit Analyst Req.

☐ Geo Code Integration

☐ NLP Framework

☒ 360-Degree Search Context

HRMS Competency Option

Use Only Evaluation Type

Related Case Processing

Number of Child Cases

☐ Enable Duplicate Checking

General Options page (2 of 2)

PeopleSoft Products

Displays the names of the applications that are installed in the database.

Country	Enter the country code for the installation.
Exchange Rate Type	Enter the exchange rate that you are using for this PeopleSoft installation.
Collector/Credit Analyst Req. (collector/credit analyst required)	Select this check box to make the Collector/Credit Analyst field a required field.
Market	Select the market for which PeopleSoft Enterprise CRM is licensed. This is <i>Global</i> , unless you license one of the industry applications. In that case, use the market that is applicable to that industry.
Geo Code Integration	This is used for Environmental Systems Research Institute (ESRI) integration. See <i>PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook</i> .
360-Degree Search Context	Select this option to control the behavior of the 360-Degree View search page. When you select this option, customer information from the 360-Degree View search page remains in system memory. The system uses this information to bypass the search page and retrieve the same customer information the next time the user accesses the 360-degree view as long the current user session is active and the interaction for the customer is still open.
Use Only Evaluation Type	If you use the Person Competency EIP to synchronize data with PeopleSoft Human Resources Management (PeopleSoft HRMS), select the type of evaluation that is considered a valid competency profile. See <i>PeopleSoft 8.8 Human Resources PeopleBook: Manage Competencies</i> .

See Also

Chapter 3, “Setting Up General Options,” Setting Up Address Formats and Values, page 30

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, “Managing Enterprise Integration for PeopleSoft Enterprise CRM”

Setting Calendar Options

Access the Calendar Options page.

Note. You need to define work week information only if you want to create entries on worker calendars automatically when a service order is assigned.

The screenshot shows the 'Calendar Options' tab selected. The 'Scheduling Options' section contains a 'Default Work Days' list with checkboxes for Monday through Sunday. Monday through Friday are checked. To the right, 'Start Time' is set to 8:00AM and 'End Time' is set to 5:00PM.

Calendar Options page

Default Work Days Select the check box for each standard workday.

Start Time and End Time Enter the default start and end times for each workday.

Setting Up Alternate Characters

Access the Alt Character page.

See [Chapter 8, “Implementing Alternate Character,” page 133](#).

Setting Up an Anonymous Business Object

Access the Anonymous Object page.

See [Chapter 4, “Setting Up PeopleSoft Customer Relationship Management Security and User Preferences,” Setting Up Guest Users, page 87](#).

Setting Up HRHD EIP Options

Access the HRHD EIP Options page.

See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, “Managing Enterprise Integration for PeopleSoft Enterprise CRM,” Understanding Enterprise Integration Technology.

Setting Up Billing and Pricing Options

Access the Billing and Pricing Options page.

See Also

PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook, “Setting Up PeopleSoft Order Capture”

[Chapter 24, “Defining Pricing Information for Services and Support Offerings,” page 385](#)

Setting Up Regions

To set up regions, use the Region (RB_REGION) component.

This section discusses how to set up regions.

Page Used to Set Up Regions

Page Name	Object Name	Navigation	Usage
Region	RB_REGION	Set Up CRM, Common Definitions, Location, Region Codes, Region	Set up regions for use with various PeopleSoft Enterprise CRM transactions.

Setting Up Regions

Access the Region page.

Region

Category Geography

Region ID CANADA

Region Details

***Status** Active

Region Type

***Description** Canada

Parent Region ID NORTH AMERICA North America

Region Hierarchy

Left | Right

- WORLD - World
 - SOUTH AMERICA - South America - Active
 - NORTH AMERICA - North America - Active
 - WESTERN - Western - Active
 - USA - USA - Active
 - SOUTHERN - Southern - Active
 - NORTHERN - Northern - Active
 - EASTERN - Eastern - Active
 - CANADA - Canada - Active**
 - EUROPE - Europe - Active

Region page

Category

Select to indicate how PeopleSoft Enterprise CRM references this region:

- Geography*: Use this region in addresses, provider group and worker assignment criteria, and pricing definitions.

- *Product Sales:* Use this region in product definitions to define where the product is sold.
- *Territory Assignment:* Use this region when defining territories in PeopleSoft Enterprise CRM Sales.
- *Number Management:* Use this region for number management (for example, pools of telephone numbers) in PeopleSoft Phone Number Administration.

Status

Select *Active* or *Inactive*.

Region Type

Select a type that describes the basis for regional divisions. General-purpose types are *Country*, *Phone*, *Postal*, *Region*, and *State*. *Region* is the most generic value, used when none of the other values apply.

Types that are specific to the communications industry are *Service Area*, *Postal Wireline*, and *Postal Wireless*. A service area is the top-level region for number management; you typically use postal wireline and postal wireless for service area subregions.

Parent Region ID

Enter the region ID for the parent of the region that you are entering. This field sets up the hierarchical relationship for regions and enables you to create parent and child relationships.

Region Hierarchy

Displays the entire regional hierarchy, including the current region.

Setting Up Locations

To set up locations, use the Location (LOCATION_TBL) and Location Timezone (RB_LOC_TIMEZONE) components.

This section discusses how to set up locations.

Pages Used to Set Up Locations

Page Name	Object Name	Navigation	Usage
Location Definition	LOCATION_TBL	Set Up CRM, Common Definitions, Location, Location, Location Definition	Define a physical location such as corporate headquarters, a branch office, or a remote sales office.
Location Detail	LOCATION_TBL2	Set Up CRM, Common Definitions, Location, Location, Location Detail	Enter details for the selected location.
Location Timezone	RB_LOC_TIMEZONE	Set Up CRM, Common Definitions, Location, Location Timezones, Location Timezone	Associate locations with time zones.

Defining Locations

Access the Location Definition page.

Location Definition page

Status Select the status of this record as of the associated effective date: *Active* or *Inactive*.

Country Select the country for the location. The system adjusts the other address fields based on the address format that is defined for the selected country.

In City Limit If you provide data to a third-party tax provider, selecting this check box identifies the location as one that is subject to applicable city taxes.

Entering Location Details

Access the Location Detail page.

Location Detail page

- Attention**
- Enter the name of the person whose name should appear in the Attention field for correspondence for the location.
- Location Detail**
- Enter descriptive text about the location.

Associating Locations with Time Zones

Access the Location Timezone page.

Location Timezones

Location Timezone Search and Assignment

*SetID

CRM01

Location Code

Search

☐ Show Unassigned Rows Only

Location Timezone

Customize | Find | View All |

First 1-52 of 52 Last

Location Code	Description	Time Zone	Country	City	State	Postal Code
KCAB00	Calgary Branch	<div></div>	CAN	Calgary	AB	A2K 1R7
KCBC00	Vancouver Branch	<div></div>	CAN	Vancouver	BC	V5C 2Z8
KCMB00	Winnipeg Office	<div></div>	CAN	Winnipeg	MB	R2Q 1E2
KCNB00	Fredricton Office	<div></div>	CAN	Fredricton	NB	N2B 1L9

Location Timezones page

- SetID**
- Enter the setID for the locations that you want to view.
- Location Code**
- Enter a full or partial location code for the locations that you want to view.
- Show Unassigned Rows Only**
- Select to view only locations without a time zone.

Setting Up Address Formats and Values

To set up address formats and values, use the Country (COUNTRY_TABLE) and State (STATE_DEFN) components.

This section discusses how to set up address information.

Pages Used to Set Up Addresses

Page Name	Object Name	Navigation	Usage
Country Description	COUNTRY_DEFN	Set Up CRM, Common Definitions, Location, Country, Country Description	Update country information.
Address Format	ADDR_FORMAT_TABLE	Set Up CRM, Common Definitions, Location, Country, Address Format	Specify formats for addresses so that they conform to the customary address format and conventions of the specified country.
State	STATE_DEFN	Set Up CRM, Common Definitions, Location, State	Add or review a state or province code. PeopleSoft delivers applications with fully populated state code tables (PS_STATE_TBL) and updates these tables as boundaries and designations change.

Updating Country Definitions

Access the Country Description page.

The PeopleSoft system contains fully populated country code tables (PS_COUNTRY_TBL). PeopleSoft updates these tables as national boundaries and designations change.

2-Char Country Code Enter the value-added tax registration ID.
(two-character country code)

EU Member State Select this check box to use euro conventions to translate
(European Union member currencies for this country.
state)

Specifying Address Formats

Access the Address Format page.

Country: GBR United Kingdom

Address Fields

Available	Label	Available	Label
<input checked="" type="checkbox"/> Address 1	Address 1	<input type="checkbox"/> Number 1	
<input checked="" type="checkbox"/> Address 2	Address 2	<input type="checkbox"/> Number 2	
<input checked="" type="checkbox"/> Address 3	Address 3	<input type="checkbox"/> House Type	
<input type="checkbox"/> Address 4		<input type="checkbox"/> Field 1 Label	
<input checked="" type="checkbox"/> City	City	<input type="checkbox"/> Field 2 Label	
<input type="checkbox"/> County		<input type="checkbox"/> Field 3 Label	
<input checked="" type="checkbox"/> State	County	<input type="checkbox"/> Postal Search	
<input checked="" type="checkbox"/> Postal	Post Code		

GB Systems Information

National Registry Directory:

Configuration File Prefix:

Address Format page

Available

Select to activate the corresponding address field and its label for inclusion as part of the standard address format for this country. When they are entering addresses, users enter a country code, and the system updates the page to display the fields that are appropriate for the specified country.

Note. To hide the field for a given country, you must *both* clear the Available field *and* blank out the Label field.

Label

Enter field labels to configure the address format so that it conforms to the country's address requirements. For example, if you enter *Province* or *Department* in the state label field, this value appears as the label of the field on the address page instead of *State*.

Postal Search

Select this check box to activate postal searching functionality for Dutch, Japanese, or UK addresses. For the UK, when you select this check box, the system makes the fields that are in the PeopleSoft GB Systems Information group box available for entry.

GB (Great Britain) System Information

This group box is used for UK addresses. It displays only if you have the Information Management Toolkit installed and configured. With this GB Information Management application installed, you can look up UK addresses by entering a postcode and, optionally, a house name or number.

National Registry Directory Enter the location of the data files containing the postcode information.

Configuration File Prefix Enter the location of the PeopleSoft-supplied configuration file (PS_GBSYS.INI).

Adding State or Province Codes

Access the State page.

The PeopleSoft system contains fully populated state code tables, complete with descriptions.

Numeric Code Enter a code for statistical and reporting purposes.

Important! You must enter a numeric code for states to display in the lookup for the License Issued By field in the Worker, Consumer, or Contact profile information.

Setting Up Salutation Codes

To set up salutation codes, use the Salutation Table (SALUTATION_TABLE) component.

This section discusses how to set up salutation codes to use in correspondence.

Page Used to Set Up Salutation Codes

Page Name	Object Name	Navigation	Usage
Salutation Table	SALUTATION_TABLE	Set Up CRM, Common Definitions, Customer, Salutation Table, Salutation Table	Set up salutations for correspondence with customers.

Defining Alpha Indexes

This section provides an overview and describes how to define alpha (alphabetic) indexes.

Understanding Alpha Indexes

Alpha indexes are primarily used by the Sales application. An alpha index enables users to quickly locate all customers whose names begin with a certain letter or sequence of letters, similar to using a rolodex. The alpha index appears on account management and contact management pages and consists of the letters of the alphabet, by default.

You can modify the default index and define different alpha indexes for each installed language. Additionally, you can assign different alpha indexes for each user.

See Also

Chapter 4, “Setting Up PeopleSoft Customer Relationship Management Security and User Preferences,” Defining Sales Preferences, page 77

Page Used to Define Alpha Indexes

Page Name	Object Name	Navigation	Usage
Alpha Index Definition	RD_ALPHA_IDX_DEFN	Set Up CRM, Common Definitions, Customer, Alpha Index Definition	Define alphabetic indexes that are used to filter a user's account list and contact list.

Defining Alpha Indexes

Access the Alpha Index Definition page.

Alpha Index Definition

Language English

Alpha Index Set Find | View All First 1 of 1 Last

*Description Default Alpha Index + -

☒ **Default**

Alpha Index Items Customize | Find First 1-26 of 26 Last

*UI Character	*Search String	+...	-
A		+...	-
B		+...	-
C		+...	-
D		+...	-
E		+...	-
F		+...	-
G		+...	-
H		+...	-
I		+...	-
J		+...	-

Alpha Index Definition page

UI Character

Enter the characters that identify this index on the user interface.

For example, to define an index that encompasses the letters A through C, you enter A-C.

Search String

Enter the search characters, separated by commas.

For example, to search for names beginning with the letters A, B, or C, enter A, B, C.

Setting Up Payment Terms

To set up payment terms, use the Payment Terms (RB_PAY_TERMS) component.

This section describes how to set up payment terms.

Pages Used to Set Up Payment Terms

Page Name	Object Name	Navigation	Usage
Payment Terms	RB_PAY_TERMS	Set Up CRM, Common Definitions, Customer, Payment Terms, Payment Terms	Define codes for payment terms and enter descriptive information and effective dates.

Defining Units of Measure

To define units of measure, use the Units of Measure (UNITS_OF_MEASURE) component.

This section discusses how to define units of measure.

Pages Used to Set Up Units of Measure

Page Name	Object Name	Navigation	Usage
Units of Measure	UNITS_OF_MEASURE	Set Up CRM, Common Definitions, Units Of Measure, Units of Measure	Define units of measure.

Setting Up Units of Measure

Access the Units of Measure page.

Units of Measure

Unit of Measure EA

Unit of Measure Each

Short Description Each

Unit Of Measure Conversions

Customize | Find | View All | First 1-4 of 4 Last

*Convert To	*Conversion Rate	Inverse		
BOX	0.25000000	4.00000000	+	-
CS	0.06250000	16.00000000	+	-
EA	1.00000000	1.00000000	+	-
ST	1.00000000	1.00000000	+	-

Units of Measure page

Conversion Rate

Enter a conversion rate to use as the default conversion rate between the UOM shown at the top of the page and the UOM listed in the Convert To field. The system automatically calculates the inverse conversion rate.

See Also

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

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

Setting Up Data Archiving

Data archiving enables you to improve system performance by using online storage for only those transactions that users are likely to access. Other transactions are archived.

Archiving is performed in the PeopleSoft Data Archive Manager using archive templates that are defined for PeopleSoft Enterprise CRM tables. This is a list of the archive templates that are defined in PeopleSoft Enterprise CRM:

Object	Template
Interactions	RI_INTER
Leads	RSF_LEAD
Orders	RO_HDR1
Quotes	RO_HDR1
Marketing Lists	RA_LIST
Chat Logs	RB_CHAT

Object	Template
Call Center Worklist Entries	WL_CASE
Case	RC_CASE
Business Projects	RC_BP
Service Order	RF_SO_HR

See *Enterprise PeopleTools 8.45 PeopleBook: Data Management*

CHAPTER 4

Setting Up PeopleSoft Customer Relationship Management Security and User Preferences

This chapter provides an overview of PeopleSoft Enterprise CRM security and discusses how to:

- Set system-wide security options.
- Implement self-service security.
- Define PeopleSoft Enterprise CRM application security.

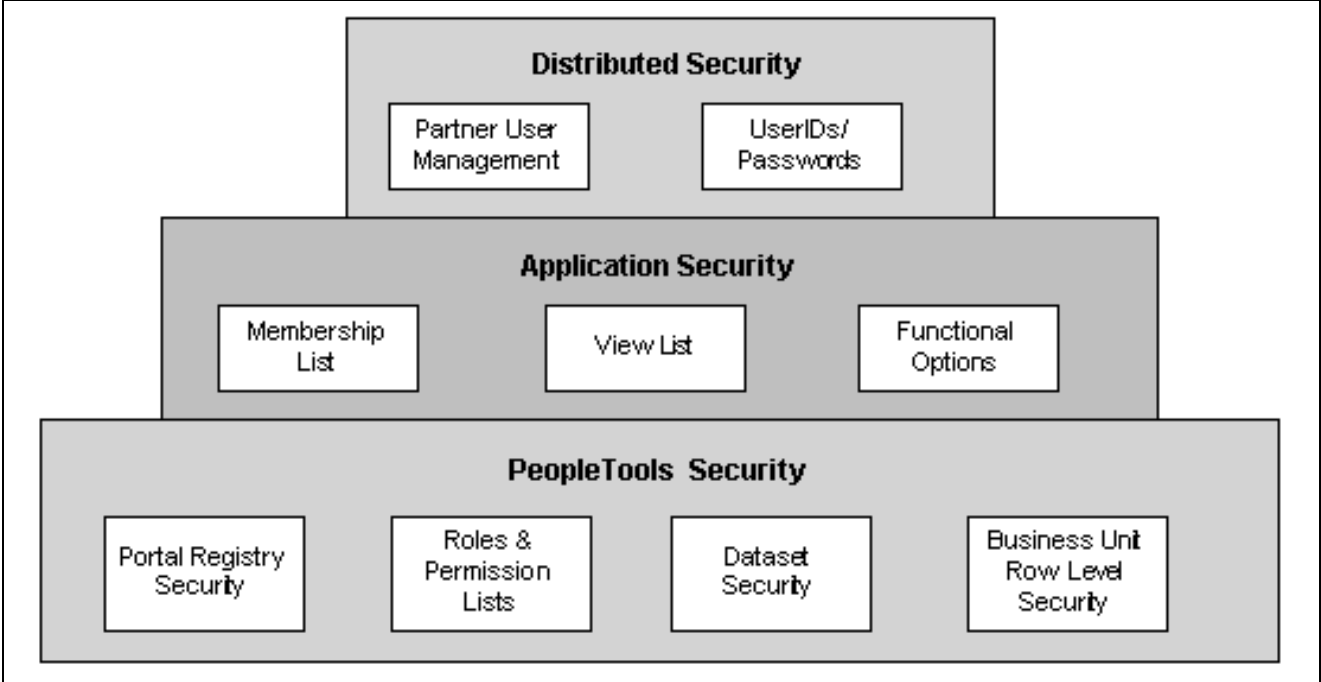
Understanding PeopleSoft Enterprise CRM Security

This section discusses:

- Security building blocks.
- Security terminology.
- PeopleTools security.
- Application security.
- Distributed security.

Security Building Blocks

This diagram provides an illustration of the different layers of security that are delivered in the PeopleTools and Customer Relationship Management security infrastructure. This chapter will cover each of these security building blocks to assist you in implementing the security needed for your enterprise.



Security building blocks

PeopleTools security controls row-level access to transactions. For example, you would use dataset security to enable a sales representative to see leads as the lead owner, or to enable a sales manager to view leads as manager, and so on.

Application security provides three key elements of CRM security: memberships lists, view lists, and functional options. Membership lists can define the characteristics of one or a group of users (for example, partner users) whose system and data access must be secured. View lists can define the characteristics of one or a group of objects (for example, customers) that a member group has view privileges to. Functional options restrict the user to a set of allowable actions within a secured transaction.

Distributed Security or Delegated administration enables you to set up administrators that are external to your enterprise so they can give other users system access, within the confines of the permissions that you allow the administrator to grant.

Security Terminology

Before you can fully enable security, you must understand the security terms and functions at each level of the system:

Security Type	Where Implemented	Function
Network	Network software	Controls entry into the network and authorizes rights to use shared resources.
Relational database management system	Operating system	Controls access to the database.

Security Type	Where Implemented	Function
User	PeopleTools	Controls access to application pages, functions, and business components.
Object	PeopleTools	Controls access to objects or object groups that are used in application development.
Query	PeopleTools	Defines the set of table rows that a user can access while making system queries.
Row-level	PeopleTools and PeopleSoft applications	Restricts access to a subset of data rows within tables to which the user has authority.
Permission list level	PeopleSoft applications	Enables PeopleSoft application security.

PeopleTools Security

Use PeopleTools security to define roles and permissions. PeopleSoft delivers a set of roles out of the box that you can use to set up role-based access to PeopleSoft transactions. PeopleSoft provides a recommended set of roles and permissions with each of the products delivered. You can add or modify new or existing roles and permissions to fit your business requirements.

This section discusses

- Portal registry.
- Roles and permission lists.
- Dataset security.
- Business unit row level security options.
- Preferred markets and security.

Portal Registry

The portal registry is a set of dedicated PeopleSoft database tables that store every content reference, typically a URL, available through the portal. A portal registry has a tree-like structure in which content references are organized, classified, and registered. A portal registry contains folders and content references. Folders group and organize content references into a multilevel hierarchy. Except for the root folder, each folder has a parent folder, and each folder can contain content references as well as other folders. Content references are objects that have been registered in the portal registry.

There are several ways to access and maintain the portal registry:

- Use the registration wizard to register content references, assign security, and update.
- Use the Menu Import feature to upgrade custom menu group definitions.
- Use portal administration pages to add, change, or delete folders and content references from a portal registry.

- Use the portal registry application programming interface (API) for programmatic access to the registry.
- Use the security synchronization process to update the portal registry security based on the menu and script security.

See *Enterprise PeopleTools 8.45 PeopleBook: Internet Technology*

Roles and Permission Lists

Permission lists are the building blocks of user security authorizations. You typically create permission lists before you create user profiles and roles. When defining permission lists, however, consider the roles and user profiles that you will use them with. Recall that roles are intermediary objects between permission lists and users. You use roles to assign permissions to users dynamically. Permission lists may contain any number of permissions, such as sign-in times, page permissions, and component interface permissions. Permission lists are more flexible and scalable when they contain fewer permissions.

Dataset Security

Dataset security controls row-level access to transactions. Dataset security is achieved by associating the definition of a dataset to the search definition for transactions that have multiple dataset rules. PeopleSoft dataset security framework may be used to build dataset rules and assign the dataset rules to PeopleTools roles.

PeopleSoft delivers a set of dataset security rules that may be used to secure transaction rows. PeopleSoft Enterprise CRM uses dataset security for data searches to restrict transaction rows.

It is also used in these applications and functions:

- PeopleSoft Sales and Mobile Sales (leads and opportunities).
- PeopleSoft Order Capture and Mobile Order Capture (quotes and orders).
- PeopleSoft Mobile Field Service.
- Calendar and Task Management.
- PeopleSoft Wealth Management.
- PeopleSoft Marketing (audience and marketing programs).
- PeopleSoft Partner Relationship Manager.

Business Unit Row-Level Security Options

You can implement security to prevent individual users or roles from accessing specific rows of data that are controlled by key fields. Likewise, you can restrict users so that they can access only a specific subset of rows. For example, you might set the user ID security for a call center agent in Paris so that the agent can access only the data that is for a particular European business unit. If you have a team of call center agents in Paris, you could add them all to a role and then use role security to give them all the same access to the system.

A user can belong to multiple roles and use the menu items that are assigned to all of those roles.

Note. You cannot define row-level security attributes by combining roles. In PeopleTools, you designate row-level security for a user by selecting a row-level security role. The row-level security attributes for the role that you select become the security attributes for the user.

This table describes the consequences of row-level security when you use different combinations of system security options and roles:

System Security	Role of User ID	Row-Level Security
No security	The user ID is not linked to a role.	Not applicable. All users can access every object because you have not implemented security.
User-level security	The user ID is not linked to a role.	Defined in the application by key field security.
Role-level security	A user ID is normally assigned to a row-level security role. You can link a user ID to multiple roles, but not when you specify row-level security.	Defined by a row-level security role. If a user ID is not assigned to a row-level security role, then the user has access to menu items but not to any application pages with key fields that are enabled for row-level security.
Permission list-level security	All users in a permission list have the same level of security.	Users are limited to the key fields that are specified by the permission list that is assigned to their user IDs.

You must define the users or roles that have access to specific business units and setIDs. For example, you might give a particular role access to only one business unit. When a user in the role enters prompts for business units (for example, when entering data that has business unit as the primary key), the available selections include only the business units for which the user has been granted authority. The user's available data has been filtered through one or more levels of security.

The number of users that are assigned the same level of security is a key factor in determining whether you base security on user IDs or roles. If a large number of users have identical access requirements, consider using roles. By assigning the users to a single role, you can make subsequent changes to access requirements once rather than many times.

Preferred Markets and Security

The preferred market that is associated with a user ID controls the data and functions that a user can access. Preferred markets are of two types: industry and geographic.

If a user's preferred market is geographic, the user can only access functionality and data that are valid for business units in the geographic region or country. For example, a country might require certain information about imports that users in another country would not need to enter.

If the user's preferred market is by industry, the user is granted access to only the functionality and data that are implemented for those industries. For example, when financial market users define companies, they can specify financial account and contract data.

See [Chapter 4, "Setting Up PeopleSoft Customer Relationship Management Security and User Preferences," Defining Overall Preferences](#), page 73.

See Also

Enterprise PeopleTools 8.45 PeopleBook: Internet Technology, "Understanding Portal Technology"

Enterprise PeopleTools 8.45 PeopleBook: Security Administration

Application Security

This section discusses:

- Enterprise administration.
- CRM application security terminology.
- Application security framework.
- Security objects.
- Dynamic and static membership lists.
- Dynamic and static view lists.
- Implicit view lists.
- Functional options.
- Functional option groups.
- Functional options conflict resolution.
- Enabling functional options.
- Business object search system processing.
- Financial services industry security.
- Catalog security.
- How security is processed at runtime.

Enterprise Administration

Application Security consists of three main pieces: membership lists, view lists and functional options. Using PeopleSoft Enterprise CRM application security, enterprise administrators have the ability to:

- Define the community of participants for which security is restricted (membership list)
- Define a group or specific list of objects (for example customers) that a partner is allowed to view and transact with (view list).
- Define a set of business processes or actions that a participant in the membership group can perform (for example, what a partner can do).

CRM Application Security Terminology

This table lists terms related to security:

Term	Definition	Example
Security Object	An object or entity that is being secured.	Partners should be allowed to view only customers that they are allowed to view. Partner is by definition a security object. Customer is also a security object.
Membership List	Characteristics of one or a group of users (for example, partner users) whose system and data access must be secured. The list ultimately contains a list of members.	A group of partners or partner users.

Term	Definition	Example
View List	Characteristics of the viewing object (for example, customers, or accounts) that are secured from the membership list. The list ultimately contains a list of objects.	A group of customers.
Functional Options	A unique code that defines what someone can do within a transaction.	Determines whether the partner can maintain orders, add customer addresses, or edit revenue.
Functional Option Group	A grouping of functional options.	Determines whether the partner can maintain orders, add customers, or view customer addresses.
Security Profile	A template that defines the view lists and functional options. A security profile is given to one or multiple membership list domains.	California customers or western manufacturing customers with the ability to maintain orders and add customer addresses.
Transaction	A primary business activity like creating orders, leads, opportunities, cases, service orders, and campaigns.	
Security List Record	A table that stores the results of the security domain queries or the static list.	

PeopleSoft Enterprise CRM Application Security Framework

PeopleSoft Enterprise CRM application security framework is a characteristic-based security framework that enables PeopleSoft customers to secure data and functions within a transaction.

For example, suppose you have a group of partner insurance agents that need access to a specific group of customers and you want this group of partners to only generate quotes, submit policy applications, and add customer addresses. Using the pages within the PeopleSoft Application Security component, you can create the security objects, lists, and profiles that you need to secure your PeopleSoft Enterprise CRM applications to accommodate this situation.

Use PeopleSoft application security to abstract partners and customers as security objects. The characteristics that define the group of partners or customers are called lists.

You can predefine the objects and lists as either membership or view to differentiate viewers (partners who are members with a security profile that have access to specific objects and data) from the target transactions or data objects (which can be customers that are secured within the partner's view privileges).

Note. Application security is used only to secure objects (person, partner, customer, financial accounts, product catalog, hold codes, performance metrics, and so on) and not transactions (orders, leads, opportunities, cases, and so on). Objects in this context mean setup data or data that is used to create a transaction.

Application security involves setting up and defining:

- Membership lists

Membership lists define the characteristics of one or a group of users (for example, partner users) to whom system and data access and functional permissions and privileges are granted. Users in a security membership list definition are associated with a security profile.

- View lists

View lists define the characteristics of the viewing object (for example, customers, accounts, product catalogs) that are secured from the membership list.

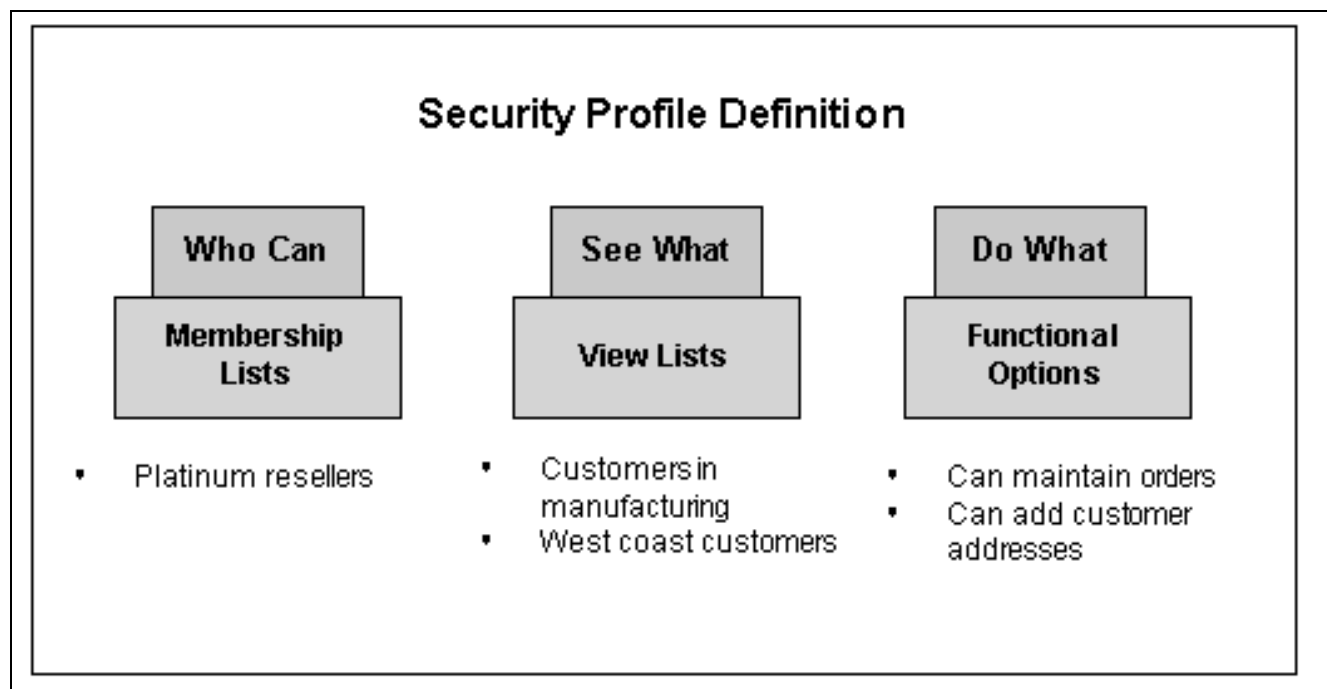
- Functional options

Functional options define the functions (for example, order submission) that can be carried out by members of a membership list.

- Security profiles

Security profiles define the combination of view lists and functional options that make up a specific profile of view and function access. Security profiles are given to members belonging to a membership list.

This illustration represents a high-level view of a security profile using PeopleSoft Enterprise CRM Application Security.



Security profile definition

Security Objects

PeopleSoft delivers a number of security objects that you can use to implement security. You should not, however, change them in any way. Any changes that you make to the security objects delivered by PeopleSoft impact the security profiles and the security list tables. PeopleSoft recommends that you limit the number of security objects that you create and are careful how you use them.

PeopleSoft delivers these membership type security objects out of the box:

Security Membership Object	Security Object Type	Industry
Customer	Membership	Order Capture
Financial Account Holder	Membership	Financial services and insurance
Partner	Membership	All
Partner Contact	Membership	Order Capture
Person	Membership	All
Role	Membership	All

Dynamic and Static Membership Lists

A dynamic membership list is a saved query of characteristics that result in a list of members for a membership list object. The queries are saved using the dynamic criteria definition that is linked to the membership list object.

If the domain type is dynamic, you can edit the membership criteria using the appropriate dynamic criteria definition. You can also view the results of the membership list.

You may associate the membership list to any security profile currently available in the system. Once you associated the membership list with a security profile, that security profile appears in the security profile list for the membership list. When needed, you can remove the association of the membership list to the security profile.

Static membership lists contain a specific list of members that you may associate with any security profile currently available in the system.

Dynamic and Static View Lists

A dynamic view list is a saved query of characteristics that results in a viewable list of objects. You set up a view list object similar to the way you set up a membership list object. After you establish a view list, you may grant one or more view list objects (dynamic or static) to a security profile.

Note. Not all objects can be used as view list objects.

View List Security Objects that are delivered as system data:

View List Security Object	Security Object Type	Application
Catalog	View List	Order capture
Customer	View List	All
Financial Account	View List	Financial services and insurance
Hold Code	View List	Order capture
Performance Metric	View List	Marketing

Implicit View Lists

A dynamically defined view list can contain a bind variable or a criteria that is not resolved at the time of creation of the query but is resolved at runtime. This is called an *implicit* view list.

A business scenario that is supported by *implicit* views lists would enable partners to view customers with whom they have previously done business with, where orders have been submitted with the partner identified.

For example, ABC Insurance (ABC1), during the creation of a home insurance policy, wants to use quick create to enter a new customer called John Smith (JS1). From this point onwards ABC Insurance would want to have access to John Smith's information.

If ABC Insurance (ABC1) creates an auto insurance policy, they would want access to John Smith (JS1) in the lookup table. The presence of both the partner (ABC Insurance) and the customer (John Smith) on the same transaction enables future partner access to that customer.

To create an implicit view list that would give ABC Insurance access to John Smith's account information, you would create a dynamic view list by selecting the *bind* search criteria for the Partner on Order field and then selecting Partner.

When you associate an implicit view list to a security profile and run the list refresh process, the system creates a new security profile for each member of the membership list that is associated to that security profile.

To set up an *implicit* view list, you must use the Configurable Search Setup - Search Fields page to select the *bind* variable for the security components and fields that you want to use on the Add View List or Add Membership List pages.

You can modify the Customer Search (RSEC_CUSTOMER_SRCH) component to use bind variables and create *implicit* view lists.

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

Functional Options

Functional options are defined independently of security objects and domains. Functional options let you determine what a user you can do within an application. For example, you can create functional options that enable users to submit orders or add new customers. To group view lists and functional options, you define a security profile. The security profile is then granted or associated to one or multiple membership lists.

Functional Option Groups

Functional option group is a grouping of functional options, which you can be associated with a security profile. Using functional option groups can make maintaining security profiles easier and more efficient. Enterprise administrators that must make wholesale changes to security profiles can simply change the functional option group associated with the security profiles that must be changed or updated.

Example:

In the world of financial services you have consumer account holders. All consumers by default get a functional option group that enables them to withdraw money up to 200 USD from an ATM, transfer balances and so on. At the same time there is also a special consumer called Don Smith whose account number is 123456. Account 123456 is in a view list that is associated to Don's security profile. On this account you can create a specific functional option called Withdraw Money and let him withdraw money up to 300 USD. The general functional option group gives him default access to a group of functional options. But the specific functional option can be applied on his account by attaching a view list to his security profile. Based on the conflict resolution that is set up to override the first optional group, he can withdraw 300 USD from the ATM.

Functional Option Codes

Functional options enable the enterprise administrator to define the functions that users can access within a transaction. Functional options codes are evaluated at run time by the transaction that is evaluating the functional option.

PeopleSoft delivers these functional options codes out of the box when you install and implement PeopleSoft Enterprise CRM:

Functional Option Code	Description	Application/Function
CORE_RS_FCAST_ROLLUP	Forecast will begin in rollup; otherwise it begins in summary.	Sales
CORE_RS_FCAST_SIMPLE	Forecast simple reduces options presented to the forecast user.	Sales
CORE_RS_ADVANCED	Controls basic versus advanced mode for lead and opportunity components.	Sales
CORE_RS_AUTO_ASSIGN_OFF	Controls the ability to automatically assign a lead or opportunity at save in add mode.	Sales
CORE_RS_DEFAULT_OWNER	When lead or opportunity is in add mode at save time, the current user is assigned as the primary sales rep by default. If revoked, then leave lead or opportunity unassigned.	Sales
CORE_RS_SEARCH_PRODUCT_GROUP	Allows the end user to search for product group on leads and opportunities.	Sales
CORE_RS_SHOW_SITE	Controls the ability to add a site to a lead or opportunity.	Sales
CORE_RS_SUMMARY	Control the display of the summary page in lead and opportunity.	Sales
RO_MAX_DISCOUNT_PERCENT	Maximum discount percent.	Order Capture
RO_MAX_ORDER_TOTAL	Maximum order total reached.	Order Capture
RO_MAX_SURCHARGE_PERCENT	Maximum surcharge percent.	Order Capture
RO_MIN_MARGIN_PERCENT	Maximum profit margin percent.	Order Capture
SEARCH_ALL_PRODUCTS	When searching for products in Order Capture, this functional option give the user the ability to search for any products that are defined in the system instead of limiting them to the products that are defined in a catalog.	Order Capture
MKTHIDE	Hides marketing fields.	Marketing
MKTDISP	Makes marketing fields display-only.	Marketing
RC_SLA_DETACH	Allows user to clear a service level agreement.	Call Center

Functional Option Code	Description	Application/Function
RSP_ADM_ACCT_TEAM	Administer account team functional option.	Strategic Account Planning
RTM_EDIT_TASK	Edit task functional option.	Task Management
QC	Provides access to Quick Create.	Business Object Search
AFT	Automatic fund transfer.	Financial Services and Insurance
All	All.	Financial Services and Insurance
APPL	Complete applications for new contract.	Financial Services and Insurance
BIPY	Pay bills.	Financial Services and Insurance
CLM	Make a claim.	Financial Services and Insurance
CLOS	Close account.	Financial Services and Insurance
CMPL	File a complaint.	Financial Services and Insurance
CPOL	Change policy.	Financial Services and Insurance
FEER	Reverse transaction fee.	Financial Services and Insurance
INQ	Inquire about new contracts.	Financial Services and Insurance
IWIR	Initiate wires.	Financial Services and Insurance
MDAC	Modify financial account.	Financial Services and Insurance
MDEP	Make deposits.	Financial Services and Insurance
MPAY	Make payments.	Financial Services and Insurance
MWTH	Make withdrawals.	Financial Services and Insurance
NEGO	Negotiate terms of new contracts.	Financial Services and Insurance
ORCC	Order cashier's checks.	Financial Services and Insurance
ORDC	Order check copy.	Financial Services and Insurance
ORDD	Order document.	Financial Services and Insurance
ORFC	Order foreign currency.	Financial Services and Insurance
ORTC	Order traveler's checks.	Financial Services and Insurance
PROF	Change profile information.	Financial Services and Insurance
RECH	Reorder check book.	Financial Services and Insurance

Functional Option Code	Description	Application/Function
REQUI	Request information.	Financial Services and Insurance
RWIR	Release wires.	Financial Services and Insurance
SCHK	Sign checks.	Financial Services and Insurance
SCON	Sign or approve new contracts.	Financial Services and Insurance
SECX	Complete security transactions.	Financial Services and Insurance
STOP	Complete stop payment requests.	Financial Services and Insurance
TMON	Transfer money.	Financial Services and Insurance
TSEC	Transfer securities in and out of accounts.	Financial Services and Insurance

Functional Options Conflict Resolution

Conflicts can happen due to the granting of the same functional options within a single security profile or multiple security profiles. To resolve conflicts the system uses these rules:

- If one functional option group grants an option and another revokes it, the revoke takes precedence. If the options are not in the same scenario, the option is granted. Revoke is for the functional option itself. (for example, do you have authorization for transfer money). If one functional option group says yes and another no, conflicts are resolved based on how the revoke options are set up.
- For amounts there is a conflict resolution called max amount wins. This means that if one functional option group gives a user access to 2000 USD and another functional option group give a user access to 3000 USD, and the max amount win option is selected, the user gets access to 3000 USD.

Here are two scenarios and the resolution mechanisms that are used to resolve the conflicts originating in the functional options:

1. Single Security Profile Functional Option Conflict Resolution:

- Bob is a financial account holder with the account number of 2001.
- Bob is associated with a single security profile (PROFILE_1).
- The security profile is associated with a functional option that allows him to transfer money up to 300 USD.
- Bob's account (2001) allows him transfer money up to 1000 USD.
- The conflict resolution option on the Transfer Money functional option is set for maximum amount always to win.
- *Resolution:* Bob can transfer up to 1000 USD.

2. Multiple Security Profile Functional Option Conflict Resolution:

- ABC Warehouse is a partner to the enterprise.
- ABC Warehouse is explicitly associated to a security profile (PROFILE_2) either through a dynamic membership list domain or a static membership list domain.
- There is also a generic security membership list for all partners (PROFILE_1), which means it includes the Partner ABC Warehouse.

- There are no functional options attached to the view list for both security profiles.
- For PROFILE_1, the administrator has specified functional options so that users can submit orders for amounts up to 5,000 USD.
The ability to add addresses has been revoked.
- For PROFILE_2, the administrator has specified functional options so that users can submit orders for amounts up to 10,000 USD.
The ability to add addresses has been granted.
- The conflict resolution option on the Order Submit functional option is set for the maximum amount always to win.
The Add Address functional option is set so that the revoke option does not win.
- *Resolution:* The ABC Warehouse Partner can submit orders up to 10,000 USD and add addresses.

Enabling Functional Options

The display template framework allows you to configure functional option security for your pages. By referencing the functional option on a button or field within the display template, the functional option security is enabled.

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

Business Object Search System Processing

The transaction adapter determines, based on the transaction, what fields appear on the customer information subpage and the criteria definition that defines the advanced search page. The criteria definition determines what criteria fields appear on the advanced search page, how they appear, and the search definitions to invoke.

The search definition determines the roles to search for the criteria fields, the fields that appear in the search results, how the search results appear, and the quick create definition that the user accesses to create a new business object.

For each role that is searched, the search role determines the security that is applied, the relationships for the role, and whether fields appear in the search criteria or results set for the role. The field definitions determine how the search fields appear on the page, the database records that are searched for each field, and how the user can search for the field.

See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, “Setting Up Business Object Search and Quick Create,” Adding and Modifying BO Search and Quick Create Definitions.

Financial Services Industry Security

Access to plans and templates is secured by dataset rules. Once a plan or template is activated, no further changes can be made in the active status. Edit control security limits edit privileges to designated individuals who can change the status from active to draft status and make modifications.

To ensure consistency between account plans, account managers define account planning templates containing a default set of objectives and goals. They can attach a list of template editors who have security access to make changes and activate a template. Once a template has been moved from draft to active, and its date range is active, account managers can begin creating account plans from a template. Tasks can be attached to an account plan. These tasks appear when you view the tasks for the associated company.

A plan has two types of application security in addition to the PeopleTools security using the permission list. The row level application security is implemented by using dataset rules. Plan edit control security ensures that the user has been granted appropriate access before any status changes can be made to the plan.

With PeopleTools role security, when a user requests access to a page, the system checks the role of the user, and then checks the permission list belonging to the role to decide if the user can access the page. Certain component items can also be disabled by using the navigation security feature. Throughout the application, certain security measures target two roles: Administrator and Agent. If you define your own PeopleTools roles, you must map the roles with either the Administrator or Agent role to get the security features for the new roles.

See *PeopleSoft Enterprise CRM 8.9 Industry Application Fundamentals PeopleBook*, “Configuring Application Security,” Defining and Maintaining Security.

Catalog Security

Catalogs are a single group of products or services that are marketed and displayed together because they share common criteria. PeopleSoft 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 your template definitions. You can designate products for inclusion in a catalog either by direct association (using product IDs) or by creating business rules to dynamically build product content based on the selection criteria that you define. Similarly, you can control user access to catalogs by associating a Security Membership List with specific catalogs.

Security Memberships allow 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 *PeopleSoft Enterprise CRM 8.9 Product and Item Management PeopleBook*, “Creating Catalogs,” Defining Catalog Content and Permissions.

How Security Information is Processed at Runtime

PeopleSoft Enterprise CRM application security uses several Application Engines and APIs (application programming interfaces) at runtime to help ensure that the customers and partners to whom you have granted security have access to the correct information and customers.

Here are the elements of runtime security that are activated when a partner, user, or customer attempts to access the PeopleSoft Enterprise CRM applications that you have secured.

- Application Engines
 - RSEC_DAEMON
 - Polls for application updates (for example, when a customer is added or updated) and triggers the RSEC_BUILDER
 - RSEC_BUILDER
 - Handles the writing of secure objects to list tables.
- Runtime API
 - Determines security memberships and view lists.
 - Generate SQL filters for calling applications
 - Determines functional options, and functional option resolution.

- **Definitional API**

Provides application programming interface to add and update security framework metadata.

PeopleCode Application Classes and SQL views provide the API to the security framework. This API is provided for impacted applications to access and update the application security framework. The API is used at runtime to evaluate membership and view privilege result sets, but there are some access methods that are provided to update the framework keys, membership, and view privilege tables directly. The API encapsulates all functionality and structure related to the security framework, so that calling applications do not need to understand the inner workings of the framework.

These access methods are an overview of how each of the impacted applications requirements are satisfied through the API.

- **API Based Direct Data Access**

This access method is provided for instances where the membership tables contain all of the relevant data for the calling application. This method produces a result rowset based on the underlying security object definition. In this usage there are three known values and one unknown value. The three known values consist of a membership security object type, a view list object type, and either a membership object ID, and or a view list membership object ID. Based on the ID that is provided, the API determines the security profiles that are associated to the known entity, and from the profiles determines the data that is to be provided as a result set. The API returns this data in a rowset based on the security object's list record.

- **API Based SQL Data Access**

This access method is provided for instances when the results in the membership table need to be merged or joined in a larger SQL statement that is being constructed by the calling application. The known values and the method of data retrieval are the same as the direct data access method, the result of this call is a SQL select statement that returns the keys of the rows of the security object's table. This SQL statement can be used in a SQL *IN* clause or correlated sub query to limit the results of the calling application's constructed query.

- **SQL/Query Based Data Access**

There may be instances in which the API cannot be used. An example of this is any time where the logic to determine a result set does not have the ability to run a PeopleCode based API, such as a standard PeopleTools prompt, a view, or a PeopleTools query. For these use cases the design provides example SQL that can be used to join the security data model.

- **Functional option Conflict Resolution**

In instances where a key resolves the same functional option multiple times with different properties, the conflict needs to be resolved. Gathering the functional options and privilege overrides is possible using a SQL UNION, but the resolution of the rules is not possible within a single SQL select statement. This requires impacted applications to be in an environment where it is possible to run PeopleCode to determine the applicable functional options. Because of this functional options are not be determined or executed in a view or query type access method.

- **Executing Functional Options**

An abstract class/interface is provided to model functional option classes. This class is used by the runtime application to run the functional option logic. The runtime class provides access to the logic that is relevant to the application and coded in the attached application class. The class also provides the ability to access the functional option amount value, operator, base currency, and perform currency conversion if required. The runtime API provide a method to pass multiple functional option codes, and execute them. A calling application's framework could leverage this to provide data driven execution.

- **Update to Data Cache**

Applications that are responsible for the security objects' secured data require access to update the security cache when a change is made. Since it is possible that a configurable search definition references any data for a given object, all additions and updates to these objects trigger a cache refresh. The known values in this case are the security object type, and security object ID. The API triggers the data caching process providing the known values as parameters. These parameters trigger the caching process to deal only with data that is relevant (for example, the specific object ID).

- **Update to Security Framework**

This access method is provided for instances where it is required to update the security framework data directly in a batch or EIP type mode. The API provides access to create membership, view privilege, functional option, and security key objects. The system provides methods to create the associations between the various security objects, and keys. Security Object types (for example, partners and customers) cannot be created through the API. Since there is not a lot of business logic tied to the security setup components, the API uses SQL objects to update the framework tables directly rather than building component interfaces.

Note. To improve runtime performance, the result sets for static and dynamic membership and view privilege domains are cached into database list tables. Dynamic implicit domains are cached by spawning security keys for each member in the domain. An Application Engine process provides the mechanism for creating the cache tables that store the membership and view privilege lists.

Distributed Security

This section discusses:

- Delegated administration.
- Role can grant hierarchies.
- Creating security groups.

Delegated Administration

Distributed security, or delegated administration, is the ability to securely delegate administrative responsibility to multiple administrators and managers in an organization (within or external to the enterprise). If you have a large number of partners and high turnover among partner users that you don't manage directly, it is very time consuming to keep track of partner user IDs and access in a centralized administrative function. Delegated administration enables you to set up partner administrators so that they can keep track of partner user access, within the confines of the permissions that you allow the partner administrator to grant

Role Can Grant Hierarchies

PeopleSoft delivers roles within PeopleTools that give administrators the ability to grant roles to other users in a logical way that represents a hierarchy. For example, when the enterprise administrator and the partner administrator are setting up partner users, they can only grant roles for which they are authorized. Partner administrators, in turn, can access the partner organization tree (sales territory tree), define the partner organization, and create partner users only using roles that the partner administrator can grant.

Role	Can Grant Roles
Enterprise channel manager	Partner admin Partner sales manager Partner Representative

Role	Can Grant Roles
Partner administrator	Partner sales manager Partner representative
Partner sales manager	Partner representative

Creating Security User Groups

PeopleSoft Partner Relationship Management (PRM) supports the use of a territory tree for partners. In distributed security, territory trees are referred to as user groups.

An enterprise can implement user groups in PeopleSoft Partner Relationship Management to set boundaries and limits around what partners can do with territory configuration. A partner manager or partner administrator can modify their own territories to show only their own partner nodes and add and delete individual partner representatives to different nodes of a territory tree managed by the partner administrator.

To implement security user groups, an enterprise completes these setup tasks:

- The enterprise administrator creates the partner territory tree initially.
- For partner organization, the enterprise administrator creates a user group.

For example, you may create a user group called *Channel* to hold all channel partners and add the enterprise channel manager as primary owner of the user group.

- The enterprise channel manager creates a user group.

For example, you may create a user group called ABC Warehouse with the IBM Channel user group as the parent for the partner company IBM. In addition, you create a partner administrator called Sally Smith as the owner. On completion of the task, the system sends an email notification to the Sally Smith, the partner administrator.

See Also

PeopleSoft Enterprise CRM Partner Relationship Management 8.9 PeopleBook, "Defining Partner Registration"

Enterprise PeopleTools 8.45 PeopleBook: Security Administration, "Understanding PeopleSoft Security"

Setting System-Wide Security Options

To setup system-wide security options, use these components

- Security Options (SECURITY_OPTIONS).
- Security View Names (SECURITY_VIEW_NAMES).
- Apply Security (APPLY_SECURITY).
- Security SetID Class (SEC_SETID_CLS).
- Security SetID Operator (SEC_SETID_OPR)
- Security Business Unit Class (SEC_BU_CLS)
- Security Business Unit Operator (SEC_BU_OPR)

- Operator Defaults (OPR_DEFAULT)
- Role Worker (RB_ROLE_WORKER).
- Security Views (SECURITY_VIEWS)

This section provides overviews of row-level security views, sensitive worker information, and predefined security roles and sample users and discusses how to:

- Select system-wide security options.
- Activate security options.
- Define view security.
- Define business unit security by permission list.
- Define business unit security by user ID.
- Define tableset security by permission list.
- Define tableset security by user ID.
- Define overall preferences.
- Define call center preferences.
- Define sales preferences.
- Define change management preferences.
- Define account preferences.
- Define roles with access to sensitive worker information.

Understanding Row-Level Security Views

Business units and setIDs are maintained in edit tables and can be used as primary keys throughout the system. When a field uses an edit table to select values, you are limited to the values that are defined for the edit table. With PeopleSoft row-level application security, you can specify which values in the edit table are available in a particular view.

Views enable you to access data horizontally for multiple tables. Views are Structured Query Language (SQL) statements that filter out data rows. Users with permission to access particular setIDs or business units see only a subset of the values in the edit tables.

After you set up views, you can specify which users or roles can access the pages that contain secured field values. Within each page, you can also hide specific fields from particular roles.

Security View Names

PeopleSoft delivers applications with security views that apply to key fields in the system. You can alter these views or build views of your own. View names include suffixes that reflect the type of security for the view. This table lists the view name suffixes and describes the corresponding security type.

View Name Suffix	Security Type
NONVW	No security.

View Name Suffix	Security Type
OPRVW	User security.
CLSVW	Permission list security.

Row-Level Security for Users

After you select security options and set up security view names, define the security-controlled field values that each user or permission list can access. When you secure key fields in the application, the pages that you use depend on the level of system security that you select. If you select user-level security, use the user security pages. If you select role-level security, use the permission list security pages.

Understanding Sensitive Worker Information

PeopleSoft uses enterprise integration points to transmit worker data from PeopleSoft Human Resources Management (PeopleSoft HRMS) to PeopleSoft Enterprise CRM. Most of the data that PeopleSoft Enterprise CRM subscribes to from PeopleSoft HRMS is sensitive.

Some users, however, should not have access to this data. To give users access to sensitive and semi-sensitive data, you must select the roles that are associated with the users and then indicate what type of information is available to them—either confidential or home contact information.

Users who have sensitive (confidential) data access defined in the Secured Worker Role setup page, can view date of birth, age, national ID, gender, and employee status fields in the Worker component; otherwise, the system hides this information. Users who have semi-sensitive data (home contact) access can view home address, home phone, home email, and home pager fields for a worker.

If a role doesn't have access to sensitive or semi-sensitive data, then all users belonging to the role cannot view the associated fields on the pages in the Worker component.

Warning! When users have access to sensitive or semi-sensitive data, the system enables them to edit some pages. If a user modifies a field in PeopleSoft Enterprise CRM, the changes could be overwritten the next time that a PeopleSoft HRMS message is transmitted to PeopleSoft Enterprise CRM because the information comes to PeopleSoft Enterprise CRM through a one-way transmission from PeopleSoft HRMS.

See Also

[Part 3, "Workforce Management," page 149](#)

Predefined Security Roles and Sample Users

PeopleSoft provides several roles with predefined user profiles and permission lists in the demonstration database. You can use these sample security configurations as they are delivered, or you can modify them to meet your specific security requirements. The roles and permissions are part of the system data, and the users are part of the sample data delivered in the demonstration database.

This section discusses:

- PeopleSoft Enterprise CRM system IDs.
- PeopleSoft HelpDesk and PeopleSoft Support user IDs.

- PeopleSoft Integrated FieldService user IDs.
- PeopleSoft financial services industry user IDs.
- PeopleSoft communication industry user IDs.
- PeopleSoft high tech industry user IDs
- PeopleSoft government industry user IDs
- PeopleSoft Marketing user IDs.
- PeopleSoft Sales user IDs.
- PeopleSoft Order Capture and Services Management user IDs.
- PeopleSoft Order Capture Self Service user IDs.
- PeopleSoft Real-Time Advisor user IDs.
- PeopleSoft Quality user IDs.
- PeopleSoft insurance industry user IDs.
- PeopleSoft energy industry user IDs.
- PeopleSoft multichannel applications user IDs.
- PeopleSoft Partner Relationship Management user IDs.
- PeopleSoft Strategic Account Planning user IDs.
- PeopleSoft Wealth Management user IDs.

PeopleSoft Enterprise CRM System IDs

This table lists the predefined user IDs, passwords, and associated roles for PeopleSoft Enterprise CRM:

User ID	Password	Roles
SYSADM	SYSADM	System administrator, manager, employee
EMPL	EMPL	Generic employee
MGR	MGR	Generic manager

PeopleSoft HelpDesk and PeopleSoft Support User IDs

This table lists the predefined user IDs, passwords, and associated roles for PeopleSoft HelpDesk and PeopleSoft Support:

User ID	Password	Roles
CCAG	CCAG	Call center agent (PeopleSoft Support)

User ID	Password	Roles
CCDIR	CCDIR	Call center director
CCMGR	CCMGR	Call center manager, manager, employee
CCSPEC	CCSPEC	Call center specialist, employee
HELPAA	HELPAA	Help desk applications administrator, employee
HELPAG	HELPAG	Help desk agent, employee
HELPMGR	HELPMGR	Help desk manager, employee, manager
SOLTNMGR	SOLTNMGR	Solution manager, employee
SUPPAA	SUPPAA	Support applications administrator, employee
TECHSPEC	TECHSPEC	Technical specialist, employee.

PeopleSoft Integrated FieldService User IDs

This table lists the predefined user IDs, passwords, and associated roles for PeopleSoft Integrated FieldService:

User ID	Password	Roles
DISPATCH	DISPATCH	Dispatcher, employee
DOCMGR	DOCMGR	Document manager, employee
DVLENG	DVLENG	Development engineer, employee
ENGMGR	ENGMGR	Engineering manager, employee
FSAA	FSAA	Field service applications administrator, employee
FSAG	FSAG	Field service agent, employee

User ID	Password	Roles
FSENG	FSENG	Field service engineer, employee
FSMGR	FSMGR	Field service manager, employee, manager
FSPART	FSPART	Field service partner, employee
INVAG	INVAG	Inventory agent, employee
INVMGR	INVMGR	Inventory manager, employee, manager
PRODMGR	PRODMGR	Product manager, employee
PURCHAG	PURCHAG	Purchasing agent, employee
RECAG	RECAG	Receiving agent, employee
TECHSUP	TECHSUP	Technical support, employee

PeopleSoft Financial Industry User IDs

This table lists the predefined user IDs, passwords, and associated roles for PeopleSoft Financial Services:

User ID	Password	Roles
FSIADMIN	FSIADMIN	FSI Administrator
FSIAGENT	FSIAGENT	FSI Agent
FSISS	FSISS	FSI Self-Service

PeopleSoft Communication Industry User IDs

This table lists the predefined user IDs, passwords, and associated roles for the PeopleSoft communication industry

User ID	Password	Roles
CSPADMIN	CSPADMIN	CSP Administrator
CSPAGENT	CSPAGENT	CSP Agent
CSPSS	CSPSS	CSP Self-Service
GUESTCOMM	GUESTCOMM	Guest - Communication

PeopleSoft High Tech Industry User IDs

This table lists the predefined user IDs, passwords, and associated roles for the PeopleSoft high technology industry.

User ID	Password	Roles
HITECHADMIN	HITECHADMIN	High Technology Administrator
HITECHAGENT	HITECHAGENT	High Technology Agent
HITECHSS	HITECHSS	High Technology Self-Service
HITECHGUES	HITECHGUES	High Technology Guest

PeopleSoft Government Industry User IDs

This table lists the predefined user IDs, passwords, and associated roles for the PeopleSoft government industry.

User ID	Password	Roles
GOVADMIN	GOVADMIN	Government Administrator
GOVAGENT	GOVAGENT	Government Agent
GOVSS	GOVSS	Government Self-Service
GOVGUEST	GOVGUEST	Government Guest

PeopleSoft Marketing User IDs

This table lists the predefined user IDs, passwords, and associated roles for PeopleSoft Marketing:

User ID	Password	Roles
CAMPMGR	CAMPMGR	Campaign manager, employee
MKTAA	MKTAA	Marketing applications administrator, employee
MKTANAL	MKTANAL	Marketing analyst, employee
MKTCRT	MKTCRT	Marketing creative, employee
MKTMGR	MKTMGR	Marketing manager, employee, manager
MKTRES	MKTRES	Marketing researcher, employee
SRVCONA	SRVCONA	Service contract administrator, employee
SYSADM	SYSADM	System administrator, employee
TELAG	TELAG	Telemarketing agent, employee
TELFFLAG	TELFFLAG	Telemarketing fulfillment agent, employee
TELMGR	TELMGR	Telemarketing manager, employee, manager
TELSLSREP	TELSLSREP	Telemarketing sales representative, employee

PeopleSoft Sales User IDs

This table lists the predefined user IDs, passwords, and associated roles for PeopleSoft Sales:

User ID	Password	Roles
SLSREP	SLSREP	Inside sales representative, employee
FLDSLSREP	FLDSLSREP	Field sales representative, employee

User ID	Password	Roles
SLSMGR	SLSMGR	Sales manager, employee
LDQUAL	LDQUAL	Lead qualifier, employee
SLSAA	SLSAA	Sales applications administrator, employee
CHSLSMGR	CHSLSMGR	Channel sales manager, employee
WAPC	WAPC	Wireless application protocol core

PeopleSoft Order Capture and Services Management User IDs

This table lists the predefined user IDs, passwords, and associated roles for PeopleSoft Order Capture and Services Management:

User ID	Password	Roles
OCADMIN	OCADMIN	Order capture administrator
OCMGR	OCMGR	Order capture manager
OCREP	OCREP	Order capture representative
FSIADMIN	FSIADMIN	FSI order capture administrator
FSIAGENT	FSIAGENT	FSI order capture agent
CSPADMIN	CSPADMIN	Communications order capture administrator
CSPAGENT	CSPAGENT	Communications order capture agent
INSADMIN	INSADMIN	Insurance order capture administrator
INSAGENT	INSAGENT	Insurance order capture agent

User ID	Password	Roles
ENERGYADMIN	ENERGYADMIN	Energy order capture administrator
ENERGYAGENT	ENERGYAGENT	Energy order capture agent

PeopleSoft Order Capture Self Service User IDs

This table lists the predefined user IDs, passwords, and associated roles for PeopleSoft Order Capture Self Service:

User ID	Password	Roles
CPCUST	CPCUST	Customer portal customer
CPSS	CPSS	Customer Portal Self Service Customer
CSPSS	CSPSS	Communication's Customer Portal Self Service Customer
GUEST	GUEST	Guest account access
COMGUEST	COMGUEST	Communications guest account access
ENERGYGUEST	ENERGYGUEST	Energy guest account access
GOVGUEST	GOVGUEST	Government user account access
GUESTCOMM	GUESTCOMM	Communications guest account access
HITECHGUEST	HITECHGUEST	High Tech guest account access
INSGUEST	INSGUEST	Insurance guest account access
USGUEST	USGUEST	US guest account access

PeopleSoft Real-Time Advisor User IDs

This table lists the predefined user IDs, passwords, and associated roles for PeopleSoft Real-Time Advisor:

User ID	Password	Roles
RADADMIN	RADADMIN	Advisor administrator
RADUSR	RADUSR	Advisor user
RADMGR	RADMGR	Advisor manager

PeopleSoft Quality User IDs

This table lists the predefined user IDs, passwords, and associated roles for PeopleSoft Quality:

User ID	Password	Roles
QASPEC	QASPEC	Quality assurance specialist, employee
QAAA	QAAA	Quality applications administrator employee
QAMGR	QAMGR	Quality manager, employee, manager

PeopleSoft Insurance Industry User IDs

This table lists the predefined user IDs, passwords, and associated roles for PeopleSoft insurance industry:

User ID	Password	Roles
INSADMIN	INSADMIN	Insurance Administrator
INSAGENT	INSAGENT	Insurance Agent
INSSS	INSSS	Insurance Self-Service
INSGUEST	INSGUEST	Insurance Guest

PeopleSoft Energy Industry User IDs

This table lists the predefined user IDs, passwords, and associated roles for PeopleSoft energy industry:

User ID	Password	Roles
ENERGYADMIN	ENERGYADMIN	Energy Administrator
ENERGYAGENT	ENERGYAGENT	Energy Agent
ENERGYSS	ENERGYSS	Energy Self-Service
ENERGYGUEST	ENERGYGUEST	Energy Guest

PeopleSoft Multichannel Applications User IDs

This table lists the predefined user IDs, passwords, and associated roles for users implementing PeopleSoft multichannel applications:

User ID	Password	Roles
ERMSMGR	ERMSMGR	Call center agent, email response management system (ERMS) manager
ERMSAGENT	ERMSAGENT	Call center agent, ERMS agent

PeopleSoft Partner Relationship Management User IDs

This table lists the predefined user IDs, passwords, and associated roles for users implementing PeopleSoft Partner Relationship Management:

User ID	Password	Roles
ECM	ECM	Enterprise Channel Manager
PADMIN	PADMIN	Partner Admin
PMGR	PMGR	Partner Sales Manager
PREP	PREP	Partner Representative
PMKTA	PMKTA	Partner Marketing Analyst
PMKTM	PMKTM	Partner Marketing Manager

PeopleSoft Strategic Account Planning User IDs

This table lists the predefined user IDs, passwords, and associated roles for users implementing PeopleSoft Strategic Account Planning:

User ID	Password	Roles
AASH	AASH	Account Administrator
ACCOUNTMGR	ACCOUENMGR	Account Manager

PeopleSoft Wealth Management User IDs

This table lists the predefined user IDs, passwords, and associated roles for users implementing PeopleSoft Wealth Management:

User ID	Password	Roles
WMADMIN	WMADMIN	Wealth Management Administrator
FA	FA	Financial Advisor

Pages Used to Set System-Wide Security Options

Page Name	Object Name	Navigation	Usage
Security Options	SECURITY_OPTIONS	Set Up CRM, Security, Security Options, Security Options	Select the type of security to implement (user or permission list) and the key fields that are controlled by the security settings.
Apply Security	RUN_FIN9001	Set Up CRM, Security, Apply Security Setups, Apply Security	Initiate the process that activates the selected security options.
Security Views Names	SECURITY_VIEWS	Set Up CRM, Security, Security View Names, Security Views Names	Define the type of security for each view in the system. The Apply Security Setups process changes the security view names to match the levels of security for each view. These names use the file extensions for the corresponding security type.
Business Unit Security by Permission List	SEC_BU_CLS	Set Up CRM, Security, Unit by Permission List, Business Unit Security by Permission List	Grant access to a business unit by using a permission list.
Business Unit Security by User ID	SEC_BU_OPR	Set Up CRM, Security, Unit by User ID, Business Unit Security by User ID	Grant access to a business unit by using a user ID.
TableSet Security by Permission List	SEC_SETID_CLS	Set Up CRM, Security, TableSet by Permission List, TableSet Security by Permission List	Grant access to a tableset using a permission list.

Page Name	Object Name	Navigation	Usage
TableSet Security by User ID	SEC_SETID_OPR	Set Up CRM, Security, TableSet by User ID, TableSet Security by User ID	Grant access to a tableset by using a user ID.
User Preferences - Overall Preferences	OPR_DEF_TABLE_RB1	Set Up CRM, Security, User Preferences, Overall Preferences	Define overall preferences for a specified PeopleSoft user.
User Preferences - Call Center Preferences	OPR_DEF_TABLE_RC	Set Up CRM, Security, User Preferences, Call Center	Define preferences for call center agents and other users of the Case component.
User Preferences - Sales Preferences	OPR_DEF_TABLE_RS	Set Up CRM, Security, User Preferences, Sales	Define preferences for sales representatives.
Change Management	OPR_DEF_TABLE_RG	Set Up CRM, Security, User Preferences, Change Management	Select user default values that you want the system to display on the Change Request page in PeopleSoft HelpDesk.
Account	OPR_DEF_TABLE_RSP	Set Up CRM, Security, User Preferences, Account	Select default values that you want the system to use when it does account assignments.
Secured Worker Role	RB_ROLE_WORKER	Set Up CRM, Security, Secured Worker Role, Secured Worker Role	Define user roles that can access sensitive and semisensitive worker information.

Selecting System-Wide Security Options

Access the Security Options page.

Security Options

Type of Security

☒ **No Security**

☐ **User ID Level Security**

☐ **Permission List Level Security**

Secured Fields

☐ **Business Unit**

☐ **Setid**

Security Options page

Type of Security

No Security

Select to disable PeopleSoft application security. All users who are authorized to access a page can select any valid setID or business unit. PeopleSoft Enterprise CRM applications are delivered with security disabled.

User ID Level Security Select to enable PeopleSoft application security by user ID. Users are limited to accessing application pages or prompt values using the setIDs and business units that are specified by their user IDs.

Permission List Level Security Select to enable PeopleSoft application security by permission list. Users can access only the key fields that are specified by the permission list to which their user IDs are assigned.

Secured Fields

Business Unit Select to implement security for the Business Unit field, which is the primary key for many transactional data tables. In some situations, the Business Unit field is a non-key field on a record.

SetId Select to implement security for the SetId field, which is the primary key for many setup and rules tables. In some situations, the SetId field is a non-key field on a record.

Activating Security Options

Access the Apply Security page.



Apply Security page

Select the language that you are using to apply security and then click Run to load the security views that you created.

Defining View Security

Access the Security View Names page.

Security View Names						
Security Views						
*Search Text	*No Security View	*User ID Security View	*Permission List Security View	Type		
RBF_INT_ISS_	RBF_INT_ISS_VW	RBF_INISS_OPRVW	RBF_INISS_CLSVW	Unit	+	-
RBF_SRVLG_	RBF_SRVLG_GS_VW	RBF_SRVLG_OPRVW	RBF_SRVLG_CLSVW	SetID	+	-
RBG_CMPGN_	RBG_CMPGN_VW	RBG_CMPGN_OPRVW	RBG_CMPGN_CLSVW	Unit	+	-
RBI_BO_QUOTE_	RBI_BO_QUOTE_VW	RBI_QUOTE_OPRVW	RBI_QUOTE_CLSVW	SetID	+	-
RBT_C_ACCT_	RBT_C_ACCT_VW	RBT_CACCT_OPRVW	RBT_CACCT_CLSVW	SetID	+	-
RBT_C_BILL_	RBT_C_BILL_VW	RBT_CBILL_OPRVW	RBT_CBILL_CLSVW	SetID	+	-
RC_CASE_	RC_CASE_NONVW	RC_CASE_OPRVW	RC_CASE_CLSVW	Unit	+	-
RCT_A_CASE_	RCT_A_CASE_VW	RCT_ACASE_OPRVW	RCT_ACASE_CLSVW	Unit	+	-
RCT_C_CASE_	RCT_C_CASE_VW	RCT_C_CASEOPRVW	RCT_C_CASECLSVW	Unit	+	-
RCT_HDCASE_	RCT_HDCASE_VW	RCT_HDCASEOPRVW	RCT_HDCASECLSVW	Unit	+	-
RCT_UA_CASE_	RCT_UA_CASE_VW	RCT_UCASE_OPRVW	RCT_UCASE_CLSVW	Unit	+	-
RD_COMPG_	RD_COMP_GS_VW	RD_COMPG_OPRVW	RD_COMPG_CLSVW	SetID	+	-
RD_CONSG_	RD_CONS_G_VW	RD_CONSG_OPRVW	RD_CONSG_CLSVW	SetID	+	-
RD_SITEG_	RD_SITE_GS_VW	RD_SITEG_OPRVW	RD_SITEG_CLSVW	SetID	+	-

Security View Names page

Search Text

Displays the view name prefixes supplied by each application. When you run the Apply Security Setups process, the system searches for view names that begin with these prefixes. If a view name begins with a prefix from this list, the process changes the view name extension to match the security type that you selected in the security options. The system stores the list in the SEC_VIEW_NAMES table, where you can review or update this information. You can also configure new security views for the system on this page.

Note. There is no need to access this page unless you want to implement customized security views.

Type

Select the type of field (*setID* or *business unit*) that the security view affects.

Defining Business Unit Security by Permission List

Access the Business Unit Security by Permission List page.

Business Unit Security by Permission List

Primary Permission List CRRB2025

Accessible Business Units Find | View All | First 1-5 of 5 Last

APP01		Appliances		
APP05		Appliances Truck Fleet		
AUS01		Australia Operations		
CAN01		CANADA OPERATIONS		
DEU01		GERMANY OPERATIONS		

Business Unit Security by Permission List page

Select the business units to which you want the permission list to have access.

Defining Business Unit Security by User ID

Access the Business Unit Security by User ID page.

Business Unit Security by User ID

User ID BLEE

Accessible Business Units Find | View All | First 1-3 of 3 Last

CAN01		CANADA OPERATIONS		
BLG01		BELGIUM OPERATIONS		
DEU01		GERMANY OPERATIONS		

Business Unit Security by User ID page

Select the business units to which you want the user ID to have access.

Defining TableSet Security by Permission List

Access the TableSet Security by Permission List page.

TableSet Security by Permission List

Primary Permission List AEAE1000

Accessible Table Sets Find | View All |  First ◀ 1-3 of 3 ▶ Last

*SetID			
CANAB 	Canada - Alberta		
CANMB 	Canada - Manitoba		
CANBC 	Canada - British Columbia		

TableSet Security by Permission List page


Select the setIDs to which you want the permission list to have access.










Defining TableSet Security by User ID

Access the TableSet Security by User ID page.

TableSet Security by User ID

User ID CC587

Accessible Table Sets Find | View All |  First ◀ 1-3 of 3 ▶ Last

*SetID			
HRHDC 	HR Help Desk Canada		
HRHCU 	HR Help Desk USA		
IN100 	Insurance		

TableSet Security by User ID page

Select the setIDs to which you want the user ID to have access.

Defining Overall Preferences

Access the Overall Preferences page.

Overall Preferences | [Call Center](#) | [Sales](#) | [Change Management](#) | [Account](#)

User ID CC623
Description Smith, Judith T

Overall Preferences

Business Unit US400 CRMCO FITNESS EQUIPMENT
SetID CRM03 CRM EXERCISE EQUIPMENT
As of Date 09/23/2002
Localization Country USA United States
Requester SAMPLE
Role Type ID
Company Name
Partner Relationship Type
***Market** Global
Order Capture Unit US400
Mobile Customer Options
PIM Preference ID
☐ **Alternate Character Enabled**
☐ **Wealth Management**

Save Return to Search Next in List Previous in List

Overall Preferences page

Note. User preferences are associated with user IDs. When you create user IDs for implementation team members and PeopleSoft users, define preferences for each user.

Business Unit

Select the user's default business unit. Select a business unit that is valid for the pages that the user normally accesses.

Users who access the product catalog (including PeopleSoft Order Capture Self Service guest user IDs) *must* have an order capture business unit as their default. If a business unit other than an order capture business unit is the default, the user cannot access the product catalog. If no default business unit is selected, then the system's default order capture business unit controls the user's access to the product catalog.

Note. This field is not used to determine the default business unit in the agent-facing and self-service case components in PeopleSoft Support and PeopleSoft HelpDesk. Use the User Preferences - Call Center page to set the defaults for those components.

SetID

Select the default setID for this user. The setID represents a set of control table information. SetIDs enable business units to share a set of control table information.

As of Date	Select the default date to use as the as of date when running date-driven reports and processes.
Localization Country	Select the country code for the localization country.
Requester	Enter a default requester ID to appear on requisitions that are initiated by this user from the Manage Material component in PeopleSoft Integrated FieldService or the RMA Form (return material authorization form) component in PeopleSoft Support.
<hr/> Important! If you integrate with PeopleSoft Purchasing, the requester ID must be a valid user ID and requisition requester in PeopleSoft Purchasing. <hr/>	
Role Type ID	If a self-service user has multiple roles, select the role type to use as the default when signing in to the self-service site. The only supported role types for self-service users are individual consumer (role type 9) and contact (role type 8).
Company Name	For self-service users who can represent multiple companies, select the company whose data appears when the contact first signs in.
Partner Relationship Type	Select the type of partner relationship that the user has with the company. This relationship appears when the contact first signs in. For every Partner Users that uses the PARTNER portal must have a user preference record that identifies the Partner Company and the relationship type of the user with the Partner Company.
Market	Select the preferred market for the user ID. The preferred market associated with the user ID determines what data and functionality are available to the user.
Order Capture Unit	Select the order capture unit that you want the system to use as a default for the user.
Mobile Customer Options	Select the mobile customer option for which you want to establish system-level defaults. Mobile customer options are created using the Mobile Customer Options page using Set Up CRM, Install, Mobile.
PIM Preference ID (personal information manager preference ID)	Select the preference ID that you want the system to use if the user is a personal information manager.
Alternate Character Enabled	Select to activate the fields that support alternate character functionality in application pages that are so enabled. The alternate character fields do not appear on application pages until you select this check box.
Wealth Management	Select if the user is a client manager. When the user accesses the PeopleSoft Strategic Account Planning application, the system opens the My Clients page.

See Also

Chapter 3, “Setting Up General Options,” Setting Up Alternate Characters, page 26

PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook, “Setting Up PeopleSoft Mobile Order Capture”

Defining Call Center Preferences

Access the Call Center page.

Overall Preferences | **Call Center** | Sales | Change Management | Account

User ID CC623
Description Smith, Judith T

Default Business Units [Customize](#) | [Find](#) | [Grid](#) First 1 of 1 Last

Primary	*Display Template ID	*Component	*Market	Business Unit
<input checked="" type="checkbox"/>	CRM_HHD	RC_CASE	GBL	HRH DU

Frequently Used Solution

Maximum Solutions to Display 10

[Save](#) [Return to Search](#) [Next in List](#) [Previous in List](#)

Overall Preferences | Call Center | Sales | Change Management | Account

Call Center page

Business Unit Defaults

Help Desk

Select the user's default PeopleSoft HelpDesk business unit. This determines the default business unit on the Case Search page in PeopleSoft HelpDesk.

Support

Select the user's default PeopleSoft Support business unit. This determines the default business unit on the Case Search page in PeopleSoft Support.

HR Help Desk (human resources help desk)

Select the user's default PeopleSoft HelpDesk for Human Resources business unit. This determines the default business unit on the Case Search page in PeopleSoft HelpDesk for Human Resources.

Self-Service Help Desk, Self-Service Support, and Self-Service HR HelpDesk

These fields apply only to self-service users; there are separate self-service user preferences for each of the call center applications. Select the default business unit for self-service users accessing new or existing cases.

If a self-service user selects a different business unit during a transaction, the selected business unit becomes the new default business unit and the data in the User Preferences - Call Center Preferences page is updated accordingly.

If you do not permit self-service users to change the business unit, then all cases that they create are associated with the default business unit.

For PeopleSoft Support users, the default business unit must be one for which the customer's setID is valid.

Frequently Used Solution

Maximum Solutions to Display

Enter the maximum number of solutions that are to appear on the Frequently Used Solutions page.

See Also

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

Defining Sales Preferences

Access the Sales page.

The screenshot displays the 'Sales' tab within the 'User Preferences' window. The user is identified as 'User ID CC623' with the description 'Smith, Judith T'. Under the 'Sales Defaults' section, the following settings are visible:

- Sales Business Unit:** FNS10 (FSI/Insurance)
- Tree Name:** FSI_WORLD (Financial Services World)
- Assignment Group:** SALES (Sales Assignment)
- Field Delimiter:** ,
- Auto Insert to My Contacts:** No

Below these settings is the 'Default Filter Set' section, which contains a table with two columns: '*Language Code' and '*Filter Set ID'. The first row shows 'ENG' and 'Default Alpha Index'. Navigation buttons at the bottom include 'Save', 'Return to Search', 'Next in List', and 'Previous in List'.

Sales Preferences page

Sales Defaults

Sales Business Unit	Select the assigned business unit.
Tree Name	Select the default sales territory tree to which the sales user can be assigned.
Assignment Group	Select in what kind of assignment group that you want this sales user to appear.

Note. Assignment group is part of territory assignment criteria.

Field Delimiter	Choose to use delimiters other than the comma, such as the semicolon. This is used for lead import.
------------------------	---

See Also

PeopleSoft Enterprise Sales 8.9 PeopleBook, “Setting Up Sales Security and Personalization”

Defining Change Management Preferences

Access the Change Management page.

Overall Preferences **Call Center** **Sales** **Change Management** **Account**

User ID ACCOUNTMGR
Description Account Manager

Change Management Defaults

Request Type SOFT Software
Sub Type UPGD Upgrade
Status NEW New
Business Reason PROB Problem/Incident Resolution
Priority MEDM Medium
Category SIGN Significant
Impact SIGN Significant
Model ID MODEL1A Software emergency

Save Return to Search Next in List Previous in List

Change Management page

Select the values that you want the system to appear by default for the user on to the Change Request page in PeopleSoft HelpDesk.

See Also

PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook, “Using Change Management”

Defining Account Preferences

Access the Account page.

Overall Preferences **Call Center** **Sales** **Change Management** **Account**

User ID ACCOUNTMGR
Description Account Manager

Account Assignment Customize Find View All First 1 of 1 Last

Assignment Owner Sales **Tree Name** WORLD **Assignment Group** CRM02 - SALES

Save Return to Search Next in List Previous in List

Account page

Select the values that you want the system to use when it assigns accounts to the user.

See Also

PeopleSoft Enterprise Bill Presentation and Account Management 8.9 PeopleBook

Defining Roles with Access to Sensitive Worker Information

Access the Secured Worker Role page.

Secured Worker Role

Role access to data Customize | Find | View All | First 1-11 of 11 Last

*Role Name	Description	Confidential Information	Home Contact Methods			
CSP Admin	CSP Admin	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		
ENERGY ADMIN	Energy Admin User Role	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		
FSI Account Manager	FSI Account Manager	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		
FSI Administrator	FSI Administrator	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		
FSI Insurance Administrator	FSI Insurance Administrator:	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		
GOV Admin	GOV Administrator	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		
HRHD Level One Agent USA	HRHD Level One Agent USA	<input checked="" type="checkbox"/>		<input type="checkbox"/>		
HRHD Level Three Agent USA	HRHD Level Three Agent USA	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		
HRHD Level Two Agent USA	HRHD Level Two Agent USA	<input type="checkbox"/>		<input checked="" type="checkbox"/>		
HRHD Manager	HRHD Manager	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		
Insurance Administrator	Insurance Administrator	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>		

Save

Secured Worker Role page

Role Access to Data

Role Name

Select the role that needs access to sensitive and semisensitive data. The roles that are defined in the example are from sample data that PeopleSoft delivers with the application. If you want to create your own roles and use them here, you must first define them in the Roles component. Select PeopleTools, Security, Permissions & Roles, Roles.

Confidential Information

Select this check box to enable the role to have access to these worker fields: Gender, DOB (date of birth), Age, National ID, and Employee Status.

Home Contact Methods

Select this check box to enable the selected role to have access to these worker fields: Home Address, Home Phone, Home Email, and Home Pager.

See Also

PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook, “Defining EIP Options for Integration to PeopleSoft HRMS”

Implementing Self-Service Security

To implement self-service security, use the Security Privilege (RB_SRTY_PRIV_DELTA), Guest Registration (RX_GUEST_REG_TMPLT), Customer Registration (RX_CUST_REG_TABLE), Representative Registration Table (RX_REP_REG_TABLE), Security Privilege (RB_SRTY_PRIV), and Registration Text Setup (RX_REGTXT_SETUP), components.

This section provides overviews of privilege codes and custom privilege codes and discusses how to:

- Establish privilege codes and custom privilege codes.
- Assign privileges to users.
- Assign privileges to roles.
- Set up existing customer user registration templates.
- Register business users.
- Set up guest users.
- Set up terms and conditions for self-service users.
- Set up terms of service for self-service users.
- Set up privacy policies for self-service users.

Understanding Privileges Codes

The self-service functionality within PeopleSoft Enterprise CRM applications includes a predefined set of privilege codes. Assign these privilege codes to users or roles to provide security for particular types of transactions, as defined in the usage column in this table:

Privilege Code	Description	Usage	Is Amount Associated?
ORDERSAVE	Save orders.	Enable users to save orders. (The button is available or unavailable.)	No.
QUOTESAVE	Save quotes.	Enable users to save quotes. (The button is available or unavailable.)	No.
ADDRMAINT	Maintain existing address.	Enable users to update existing addresses. (The button is available or unavailable.)	No.
ADDRMAINTCNT	Maintain existing contact.	Enable users to update existing contacts.	No.

Privilege Code	Description	Usage	Is Amount Associated?
ADDRNEW	Add new address.	Enable users to add new addresses. (The button is available or unavailable.)	No.
ADDRNEWSITE	Convert address to site.	Enable users to convert the address to site. (The button is available or unavailable.)	No.
ADDRNEWCNTCT	Add new contact person.	Enable users to add a new contact person. (The button is available or unavailable.)	No.
NEWACCT	Create new account.	Enable users to create a new account.	No.
VIEWALLORDRS	View all orders.	Enable users to view all orders placed by others with an amount less than the amount specified. (The rows are available or unavailable.)	Maybe. You can use the operator code for less than (<) or less than or equal to (<=) to include a dollar amount.
VIEWALLQUOTS	View all quotes.	Enable users to view all quotes that were placed by others with an amount that is less than the amount specified. (The rows are available or unavailable.)	You can use the operator code for less than (<) or less than or equal to (<=) to include a dollar amount.

Understanding Custom Privilege Codes

You can define your own privilege codes and associate them with transactions on the User Privileges page and Role Privileges page. After you define the privilege codes, you must add the custom code to the transaction that has the custom security level.

To define a privilege code that prevents consumers from ordering more than 100,000 USD worth of goods:

1. Define the Order Amount privilege code (CUSTORDAMT).
2. On the Role Privileges page, assign the privilege code to the individual consumer role and specify that the amount must be less than 100,000 USD.
3. On the FieldChange event of the Order Submit button, add the following code:

```
Declare Function IsTransactionAuthorized PeopleCode FUNCLIB_RB.SRTY_PRIV_CD Field?
Formula;
```

```
Local number &output_msg_set_nbr, &output_msg_nbr;  
  
If Not IsTransactionAuthorized(&roleType, &strPersonID, &numBOIDCustomer,?  
    ?CUSTORDAMT?, &numAmount, &output_operator_cd , &output_amount_qty , &output_msg_  
set_nbr, &output_msg_nbr) Then  
    If All(&output_msg_set_nbr, &output_msg_nbr) Then  
        Error MsgGet(&output_msg_set_nbr, &output_msg_nbr, "Message Not Found.");  
    End-If;  
End-If;
```

In the preceding code example, pass &roleType as 9 (the Individual Consumer role). Pass &strPersonId as the person ID, and pass &numBOIDCustomer as the customer's business object ID. The privilege code is CUSTORDAMT, which is your defined custom privilege code. &numAmount is the amount of the customer's order. The remaining parameters are output parameters that you do not need to pass.

Use the delivered PeopleSoft Enterprise CRM self-service code as an example to customize security of other transactions.

Pages Used to Implement Self-Service Security

Page Name	Object Name	Navigation	Usage
Security Privilege Code Setup	RB_SRTY_PRIV	Set Up CRM, Security, Self-Service, Privilege Code, Security Privilege Code Setup	Define the privileges that are associated with the privilege codes.
Assign User Privileges	RB_SRTY_PRIV_DELTA	Set Up CRM, Security, Self-Service, User Privileges, Assign User Privileges	Assign user privileges.
Assign Role Privileges	RB_SRTY_PRIV_DFLT	Set Up CRM, Security, Self-Service, Role Privileges, Assign Role Privileges	Assign privileges to roles.
Existing Customer User Registration Setup	RX_CUST_REG_TABLE	Set Up CRM, Security, Self-Service, Existing Customer Registration, Existing Customer User Registration Setup	Create templates of records and fields to be used on the User Registration Setup page.
Business User Registration Setup	RX_REP_REG_TABLE	Set Up CRM, Security, Self-Service, Business User Registration, Business User Registration Setup	Register business users.
User Registration Setup	RX_GUEST_TEMPLATE	Set Up CRM, Security, Self-Service, User Registration, User Registration Setup	Register guest users.
Self Service Registration	RX_REGTXT_SETUP	Set Up CRM, Security, Self-Service, Terms and Conditions, Self Service Registration	Set up terms and condition statements for users completing self-service registration.
Terms of Service	RX_TERMS_SETUP	Set Up CRM, Security, Self-Service, Terms and Conditions, Terms of Service	Set up terms of service statements for users completing self-service registration.
Privacy Policy	RX_PRIVACY_SETUP	Set Up CRM, Security, Self-Service, Terms and Conditions, Privacy Policy	Set up privacy policy statements for users completing self-service registration.

Establishing Privilege Codes and Custom Privilege Codes

Access the Security Privilege Code Setup page.

Security Privilege Code Setup

Privilege Code ORDERSAVE

***Description** Order Save

Modified 12/13/2001 2:00PM PST SS

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

Security Privilege Code Setup page

Enter a description of the privilege code that you are adding.

Assigning Privileges to Users

Access the Assign User Privileges page.

Assign User Privileges

Person ID 0011 **Name** Marx,Stu Manager

User Privileges

Business Contact Name	*Privilege	Revoke	Operator	Amount	Message Set Number	Message Number		
MMA Property Manag	View All Quotes	<input type="checkbox"/>	<=	1,000,000.000	6920	20	+	-
University of Comput	View All Quotes	<input type="checkbox"/>	<=	1,000,000.000	6920	20	+	-
Sterling Software Cor	View All Quotes	<input type="checkbox"/>	<=	1000000	6920	20	+	-

Save Add Update/Display

Assign User Privileges page

Define user privileges by associating a person with a business contact and assigning privilege codes. The business contact is typically a customer that the person represents. The user privileges enable you to define self-service security more specifically than the role privileges.

For example, suppose that a contact's role privileges do not enable the contact to update customer address information. If you need to enable a particular contact to update addresses, you could do that by assigning the user privilege to that contact. Conversely, suppose that a contact's role can submit a quote, but you want to revoke a particular contact's privilege to submit quotes. You do that by adding the privilege for submitting quotes and then selecting the Revoke check box.

Business Contact Name and Privilege Select the business contact's name and the privilege code.

Revoke Select to revoke a privilege.

Operator and Amount For transactions that are dependent on an amount, you can define privileges that are associated with particular amounts. If the system authenticates the user for the amount, it displays the appropriate information. For the Amount field, only numeric values are relevant; the system does not take the currency into account.

Message Set Number and Message Number

Associate a default message in case of authorization failure. If authorization fails, the transaction that failed can display the default message or its own message.

PeopleSoft Order Capture Self Service is delivered with two privilege codes that are built to use privilege amounts: View All Orders (VIEWALLORDRS) and View All Quotes (VIEWALLQUOTS). These privileges are associated with an amount that further restricts access to order or quotes over a certain dollar amount.

Assigning Privileges to Roles

Access the Assign Role Privileges page.

Assign Role Privileges

Role Type ID 8

Description Contact

Role Privileges

*Privilege	Operator	Amount	Message Set Number	Message Number		
Order Save					+	-
Quote Save					+	-
View All Orders	<=	10,000,000.000	18068	12	+	-
View All Quotes	<=	10,000,000.000	18068	12	+	-

Save

Return to Search

Next in List

Previous in List

Add

Update/Display

Assign Role Privileges page

Only two business object roles (as defined in the Customer Data Model) are supported with PeopleSoft Enterprise CRM self-service. These are consumer and contact. View the sample data for the role privileges and follow the sample as a guideline. If you have transactions for which data filtration is based on an amount, use the Amount field.

Amount

Use this field if you have transactions for which data filtration is based on an amount.

Message Set Number and Message Number

Associate a default message in case of authorization failure. If authorization fails, the transaction that failed can display the default message or its own message.

Setting Up Existing Customer User Registration Templates

Access the Existing Customer User Registration Setup page.

Existing Customer User Registration Setup

Template EMAILNAMETMP

***Description** Email and Name Template

Customize | Find |

First 1-3 of 3 Last

*Record (Table) Name	*Field Name	*Field Label		
SS_EXT_USER_REG	EMAIL_ADDR	Email Address	+	-
SS_EXT_USER_REG	FIRST_NAME	First Name	+	-
SS_EXT_USER_REG	LAST_NAME	Last Name	+	-

Save

Return to Search

Add

Update/Display

Existing Customer User Registration Setup page

Use this page to set up templates for the fields and records that you want to use for customer registration. Once you save the template, you can select it from the Template field within the Customer Registration Fields group box on the User Registration Setup page.

When you set up existing customer user registration, you specify the information that customers enter to verify their status as existing customers. The system uses this as a template that appears for customers to enter the information

Note. For security reasons, set up at least two keys that are known only to the user.

Registering Business Users

Access the Business User Registration Setup page.

Business User Registration Setup

Company Code SHOREVIEW

Company Name Shoreview Medical

Authenticate Company Login Find | View All First 1 of 1 Last

***Company Key** SHOREVIEW

Max Registrations Allowed 10

Remaining Registrations 10

Assign Contact Roles

- ☒ **Sold To** This contact can make purchases.
- ☒ **Bill To** This contact can receive bills.
- ☒ **Ship To** This contact can receive shipments.

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

Business User Registration Setup page

To administer self-registration as a business user (a contact of a company), use the Business User Registration Setup page to establish a company code and password (company key).

The company name is the company for whom you are setting up the registration keys. When a self service user or external company administrator uses the company key to register, the user that is created by the system is tied to the company defined on this page.

Company Key Enter a value that you provide to a company administrator so that their users can self-register and gain access to the site. The company code and key are used to authenticate users who attempt to register at the self-service site.

Max Registrations Allowed (maximum registrations allowed) Enter the number of users that are permitted to register with this specific company code.

Assign contact Roles Select *Sold To*, *Bill To*, or *Ship To* to establish the capacity of the business users that represents the company.

Setting Up Guest Users

Access the User Registration Setup page.

User Registration Setup

User ID GUEST

Confirm Guest Password

Password** **

Password Security Policy

☐ Password Never Expires
☒ Password Expires inDays

Copy Default Consumer Options

Consumer Name IPRODConsumer Template

Permission Lists

***Process Profile** ALLPAGES
***Primary** ALLPAGES

Customer Registration Fields

Template

Terms and Conditions

Terms and Conditions **SetID** IPROD

User Registration Setup page (1 of 2)

Transfer To

☒ Catalog
☐ Customer Care

Grant Consumer Role(s) [Customize](#) | [Find](#) | First 1-2 of 2 Last

*Role Name	Description		
Consumer	Consumer	+	-
PAPP_USER	Enterprise Portal User	+	-

Grant Business User Role(s) [Customize](#) | [Find](#) | First 1-2 of 2 Last

*Role Name	Description		
Customer	Customer	+	-
PAPP_USER	Enterprise Portal User	+	-

User Registration Setup page (2 of 2)

Self-service security is controlled by privileges that you establish and assign to guest user IDs. When a user registers, the system clones the currently active guest ID, with all its access privileges, to create the new user ID, and then creates the necessary customer or consumer record in the CRM database.

See [Chapter 19, “Setting Up Customer Self-Service,” Setting Up Guest IDs to Access Self-Service Sites, page 268.](#)

To administer registration through PeopleSoft Enterprise CRM self-service, you must set up a guest user ID. The guest user acts as an administrator and provides the defaults that are necessary to establish new users.

User ID	<p>Displays the guest user ID, which is used to make the self-service site available to anonymous users. You can add several guest users. Associate each guest user with a different business unit that is defined on the User Preferences page. By defining several guest users, you can provide access to different self-service sites that support different segments of the business.</p> <p>For example, suppose that the user ID <i>GUEST</i> is associated with business unit US001, which sells sporting good products. The user ID <i>GUESTCOMM</i> is associated with business unit COM01, which sells telecommunications products. When you implement these sites, you can define both guest users, and users can access either site depending on the guest user ID that they supply.</p> <p>Similarly, you can make the language of a site dependent on the guest user ID.</p>
Password	<p>Enter the exact password that authenticates the guest user. The user ID and password in combination are either appended to the URL string that provides direct access to the site or is placed in the config.properties file in PeopleTools installation.</p> <p>Refer to the installation instructions for more information about installing direct access to your website.</p>
Password Never Expires and Password Expires in Days	<p>Select one of these values to indicate when the password expires. If you select <i>Password Expires in Days</i>, enter the number of days.</p>
Consumer Name	<p>Select the template that you want to use for the consumer name. Guest users visiting the self-service site might create their own accounts but only provide minimal information, such as user ID, password, name, email, phone, and address information. The guest user does not enter other required information, such as currency, payment method, and carrier information, which appears by default from the template consumer.</p>
Process Profile and Primary	<p>Assign an appropriate permission list that has access to run batch processes. This permission list is copied to the new user that is created through self-service.</p>
Template	<p>Select the template that contains the fields and records that you want to use for guests using self-service registration.</p>
Terms and Conditions	<p>Select the template that contains the terms and conditions, terms of service, and privacy statements that you want to use for guests using self-service registration.</p>
Catalog and Customer Care	<p>Select the item to which you want to direct self-service users.</p>
Role Name	<p>Grant roles for consumer and business users by selecting role names from the lists in the Grant Consumer Role(s) and Grant Business User Role(s) grids. You can add as many roles as you want. When a consumer is created, the consumer roles that you specify are assigned to the new consumer user; and when a business user is created, the business user roles that you specify are assigned to the new business user.</p>

To enable guest users to create their own user IDs, you must define the roles that a guest user can grant to create self-service users.

For example, in the delivered sample data, the GUEST role and the PeopleTools role UPG_ALLPAGES can grant the consumer role. When the VP1 user signs in to set up the guest user registration, that user can select the consumer role. When the guest user or an anonymous user registers as a consumer, the system assigns the new user to the consumer role.

See Also

[Chapter 19, “Setting Up Customer Self-Service,” page 265](#)

Setting up Terms and Conditions for Self-Service Users

Access the Terms and Conditions - Self Service Registration page.

Self Service Registration **Terms of Service** **Privacy Policy**

Terms and Conditions Setup

Please enter Self Service Registration Text, Terms of Service Statement, and Privacy Policy Statement.

SetID: SHARE

Terms and Conditions: GUEST

☒ **Default**

Self Service Registration

```
<table border='3' cellpadding='0' cellspacing='0' >
<tr>
<td valign='top' align='LEFT'>
By submitting your registration information, you indicate that you agree to the %
TERMS_OF_SERVICE and have read and understand the %PRIVACY_POLICY.
Your submission of this form will constitute your consent to the collection and use of this
information and the transfer of this information to the United States or other countries for
processing and storage. You also agree to receive required administrative and legal
notices such as this electronically.
</td>
</tr>
</table>
```

Terms and Conditions - Self Service Registration page

Enter the text for the terms and conditions that you want users to see during self-service registration.

Setting up Terms of Service for Self-Service Users

Access the Terms and Conditions - Terms of Service page.

Self Service Registration
Terms of Service
Privacy Policy

Terms and Conditions Setup

Please enter Self Service Registration Text, Terms of Service Statement, and Privacy Policy Statement.

SetID: SHARE

Terms and Conditions: GUEST

Terms of Service

```

<table border='0' cellpadding='0' cellspacing='0' >
<tr>
  <td height='40'></td>
  <td colspan='4' valign='top' align='LEFT'>
    <span class='PAPAGETITLE' >Terms of Use</span>
  </td>
</tr>
<tr>
  <td colspan='3' valign='top' align='LEFT'>
    <span class='PABOLDTEXT' >1. Introduction and Acceptance of Terms of
    Use.</span> PeopleSoft, Inc. ("PeopleSoft") offers you a wide range of content,
    communication tools, forums, and information about its products and services
    ("Materials") via this web site. By using this web site, you are agreeing to accept and
    comply with the terms and conditions of use as stated below ("Terms of Use"), which
    PeopleSoft may update at any time without notice. You should visit this page periodically
    to review the then-current Terms of Use. Please note that PeopleSoft may, at its sole
    discretion, terminate your access to this web site at any time without notice.
  </td>
</tr>
<tr> <td height='10'></td> </tr>

```

Terms and Conditions - Terms of Service page

Enter the text for the terms of service that you want users to see during self-service registration.

Setting up Privacy Policies for Self-Service Users

Access the Terms and Conditions - Privacy Policy page.

Self Service Registration	Terms of Service	Privacy Policy
<h2>Terms and Conditions Setup</h2> <p>Please enter Self Service Registration Text, Terms of Service Statement, and Privacy Policy Statement.</p> <p>SetID: SHARE</p> <p>Terms and Conditions: GUEST</p> <p>Privacy Policy</p> <div> <pre> <table border='0' cellpadding='0' cellspacing='0' > <tr> <td height='40'></td> <td colspan='4' valign='top' align='LEFT'> PeopleSoft Privacy Statement </td> </tr> <tr> <td colspan='3' valign='top' align='LEFT'> PeopleSoft, Inc. ("PeopleSoft") respects your privacy and is committed to protecting your personal information that you provide to us. This statement explains our policies and practices regarding the use and disclosure of your personal information by PeopleSoft. Please note that, PeopleSoft reviews and updates this Privacy Policy from time to time as needed without notice. Therefore, you should review the terms of this policy periodically to make sure that you are aware of how PeopleSoft collects and uses personal information. By using our web site, you consent to the collection and use of your personal information by PeopleSoft as explained below. </td> </tr> <tr> <td height='10'></td> </tr> </pre> </div>		

Terms and Conditions - Privacy Policy page

Enter the text for the privacy policy that you want users to see during self-service registration.

Defining Application Security

To define application security, use these components:

- Security Profile Definition (RSEC_PROFILE_DEFN).
- Security Membership Definition (RSEC_MEMBER_DEFN).
- Security View Definition (RSEC_VIEW_DEFN).
- Security Function Definition (RSEC_FUNC_DEFN).
- Security Function Group (RSEC_FUNC_GROUP).
- Security Object Definition (RSEC_OBJECT_DEFN).
- Security Builder (RSEC_BUILDER_RUN).
- Security Static Transfer Menu (RSEC_STAT_MENU).

This section discusses how to:

- Define security objects.
- Add membership list names and descriptions.
- Select membership objects and object members.
- Select the membership type.
- Add members to a static membership list.
- Choose the dynamic criteria for the membership list.
- Add view list names and descriptions.
- Select view objects and options.
- Select the view type.
- Add members to static view list.
- Choose the dynamic criteria for the view list.
- Define functional options.
- Define functional option groups.
- Add functional option groups and view lists to the security profile.
- Add membership lists to the security profile.
- Set run controls for the list build process.
- Enter static member transfer paths.

Pages Used to Define Application Security

Page Name	Object Name	Navigation	Usage
Security Object	RSEC_OBJECT_DEFN	Set Up CRM, Security, CRM Application Security, Security Object, Security Object	Define the characteristics of the security object.
Add Membership List	RSEC_MEMBER_SMRY	Set Up CRM, Security, CRM Application Security, Add Membership List, Add Membership List	Enter the membership list name and description.
Add Membership List	RSEC_SRTY_WIZ1	Click Next at the bottom of the first Add Membership List page.	Select the membership object and the members to which you want the security object to apply.
Add Membership List	RSEC_SRTY_WIZ2	Click Next at the bottom of the second Add Membership List page.	Select the membership type.

Page Name	Object Name	Navigation	Usage
Add Membership List (static)	RSEC_ML_PARTNER, RSEC_ML_CUSTOMER, RSEC_ML_PART_C, RSEC_ML_PERSON, RSEC_ML_ROLE	Select Static and then click Next at the bottom of the third Add Membership List page.	Select the partners, partner contacts, customers, people, or roles that you want to add to the membership list.
Add Membership List (dynamic)	RSEC_PARTNER_SRCH, RSEC_CUSTOMER_SRCH, , RSEC_PART_CON_SRCH, RSEC_PRSN_SRCH	Select Dynamic and then click Next at the bottom of the third Add Membership List page.	Choose the dynamic criteria that you want to use to select either customers, partners, partner contacts, or persons.
Add View List	RSEC_VIEW_SMRY	Set Up CRM, Security, CRM Application Security, Add View List, Add View List	Enter the view list name and description.
Add View List	RSEC_SRTY_WIZ1	Click Next button from the first Add View List page.	Select the security object and the members to which you want the security object to apply.
Add View List	RSEC_SRTY_WIZ2	Click Next from the second Add View List page.	Select the view type.
Add View List (static)	RSEC_VL_CATALOG, RSEC_VL_CUSTOMER, RSEC_VL_HOLD, RSEC_VL_RA_METRICS	<ul style="list-style-type: none"> For catalog, hold codes, and metrics, click Next from the second Add View List page. For customers, click Next from the third Add View List page. 	View the criteria that you chose to select customers.
Add View List (dynamic)	RSEC_CUSTOMER_SRCH	Click Next at the bottom of the third Add View List page.	Choose the dynamic criteria that you want to use to select customers.
Functional Option	RSEC_FUNC_DEFN	Set Up CRM, Security, CRM Application Security, Functional Option, Functional Option	Define functional options, including enabling amount-related fields, conditional operators, application classes, and messages.
Functional Option Group	RSEC_FUNC_GROUP	Set Up CRM, Security, CRM Application Security, Functional Option Group, Functional Option Group	Group functional options.
Security Profile	RSEC_PROFILE	Set Up CRM, Security, CRM Application Security, Add Security Profile, Security Profile	Define a security profile.
Security Profile - Membership	RSEC_PROFILEMEMBER	Set Up CRM, Security, CRM Application Security, Add Security Profile, Membership	Add membership lists to the security profile

Page Name	Object Name	Navigation	Usage
Refresh Dynamic Lists	RSEC_BUILDER_RUN	<ul style="list-style-type: none"> Set Up CRM, Security, CRM Application Security, Refresh Dynamic Lists, Refresh Dynamic Lists Click Run from the Security Profile page. 	Set run controls for the List Build process.
Static Menu Transfer	RSEC_STAT_MENU	Set Up CRM, Security, CRM Application Security, Static Menu Transfer Path, Static Menu Transfer	Enter static menu transfer paths.

Defining Security Objects

Access the Security Object page.

Security Object

Save Run Search Next Previous Refresh Add

Object ID PARTNER **Object Name** Partner

Security Object Definition

*Object Name Partner *Object Type Membership

Description Partner Security Object

*View Record RSEC_SL_PTNR_VW *Security List Record RSEC_ML_PARTNER

Object Source Navigation Partner Search Static List Navigation Partner Static Member List

Cache Option Scheduled Always

Security Object Options

☒ Allow Dynamic Members
 ☐ Secure All
 ☒ Allow Multiple Members
 ☒ Show In Wizard
 ☒ Allow Reuse
 ☒ Allow All
 ☒ Allow Single Member

Security Object page (1 of 2)

Related Security Objects Customize Find First 1-3 of 3 Last

Related Object	Name
CATALOG	Catalog
CUSTOMER	Customer
METRIC	Performance Metric

Add Related Security Object

Audit Details

Security Object page (2 of 2)

Object Type

Select either *Membership* or *View Privilege*. The Object type determines whether the Security Object is used for defining Membership List or View List.

View Record	View record is used to resolve the list of members for a dynamic membership or view list. The view record must be a distinct subset of the search record that is used in defining the search for dynamic criteria.
Security List Record	Select the record where you want the system to store the results of the query or static list that is associated with the security object. The security list record may vary for each security object.
Object Source Navigation	Select the object source to which you want the system to navigate while creating dynamic membership or view lists. Selecting the object source that corresponds to the security object that you are creating provides for the proper transfer of the object source during the creation of dynamic membership or view lists. Data searches that are enabled for application security are only available as part of the selection. It is important to choose the correct search definition for the security object.
Static List Navigation	<p>Select the static list that you want the system to navigate to during the creation of the security profile.</p> <p>This is the navigation that is used for entering static list data or viewing static list data that is either dynamically created or manually entered. You set up static list navigations on the Static Menu transfer page. The system builds the Static List page with the static list record as a level 1 grid.</p>
Cache Option	Select the cache option that you want the system to use for the security object. The caching option is mainly used for partner and customer security. Basically, when a customer or a partner is added or updated in the Customer Data Model (CDM), it tells the system how often to cache the list members in the list tables and run the Application Engine job that creates the dynamic queries.
Security Object Options	<p>Select one or multiple security object options values:</p> <ul style="list-style-type: none"> • <i>Allow Dynamic Members:</i> Select this check box if you want to create dynamic membership or view lists. • <i>Allow Reuse:</i> Select this check box if you want to create lists that can be associated with more than one security profile. If you clear this check box, the static or dynamic lists that you create can be attached to only a single security profile, and the security list record for these security objects will contain the security profile value. <hr/> <p>Note. This check box is used for performance reasons. When you select this check box, the system adds the security profile ID to the Security List Table. Using this option enables the system to make a three-table join and retrieve results quickly. For example, in FSI the account holders and accounts are accessed directly through a join from the Security List tables of the account and account holders, which are joined with the Security Profile table.</p> <hr/> <ul style="list-style-type: none"> • <i>Secure All:</i> Select this check box if you want the system to apply the view record on the security object definition. If you clear this check box, no security is applied on the view record. Clearing this check box also causes applications to skip the security check.

Note. This check box is used for performance reasons. For example, if one of your security profiles is set up to give access to *All*, the security API will not return any data. It is implied that the calling application would display everything. In this situation users in Order Capture Administration have access to all hold codes. When the Order Capture application calls the Security API, the Security API gives the administrators access to all hold codes. In the code for the Order Capture application the system doesn't have to create an extra *Where* clause to show the filtered list of hold codes.

Note. If you clear this check box, the SQL API returns a state status of three (3). If the SQL string that is returned contains SQL, then security must be applied. Empty strings cause the system to skip the security check. ERROR (or some other constant) indicates that the context has access to no security profiles and zero rows should be returned.

- *Allow All:* Select this check box if you want the system to display the All field when you are adding view or membership lists to the security profile.
- *Allow Multiple Members:* Select this check box if you want the system to display the Multiple Lists as an available option when you are creating a view or membership lists.
- *Allow Single Member:* Select this check box if you want the system to display the Single Member as an available option when you are creating a view or membership list.
- *Show In Wizard:* Select this check box if you want the system to display the security object as a selectable option in the drop-down list box when you are creating membership or view lists.

Related Security Objects

Select the security objects that you want to associate with a security profile. When a security profile is created, the list of valid membership and view list objects are based on an intersection of the security objects.

For example, if you create a security profile for a customer view list, the system displays the person and partner membership lists in the membership object drop-down list box.

Adding Membership List Names and Descriptions

Access the Membership List page.

Add Membership List

Enter the membership list name and description
The membership list you create will be associated to a security profile. Choose the active status to use the list immediately after creation.

Membership List Definition

*Name: Partner Resellers *Status: Active

Description: Partners authorized to sell XBR line of products.

Next >

Add Membership List page

Enter a name for the membership list that you want to create. Select the *Active* status. Enter text that describes the type of membership list that you are creating.

Selecting Membership Objects and Object Members

Access the Add Membership List page.

Add Membership List

Select the membership object and the object members
Select the object type and then select the membership option that best meets your needs.

Select Membership Object

*Security Object: Partner

Membership Applies To

☐ **All** - Use this option to give permission to everyone

☒ **Multiple Members** - Use this option to give permission to a specific set of members

☐ **Single Member** - Use this option to give permission to a single member

< Back Next > Cancel

Add Membership List page

Security Object

Select the security object that you want to use for your membership list:

- *Customer*
- *Partner*
- *Partner Contact*
- *Person*
- *Role*

Note. You can also create your own security object and select it from this list. You would, however, need to call the delivered security APIs at runtime to access security.

Membership Applies To

Indicate to whom you want the membership list to apply. Select:

- *All*: Select if you want the membership list to apply to all members associated with the security object.
- *Multiple Members*: Select if you want the membership list to apply to select group of members that are associated with the security object. When you click Next, the system displays the next Add Membership List page, where you can select the membership type that you want to use (either dynamic or static).
- *Single Member*: Select if you want the membership list to apply to a single member associated with the security object. When you click Next, the system displays the page that is associated with the security object (either customers, partners, partner contacts, persons, or roles).

Next

Click to go to the next page. The system displays a new page based on the selections that you have made on the previous Add Membership List pages.

Selecting the Membership Type

Access the Add Membership List page.

Add Membership List

Select the membership type
The membership type can be static or dynamic. A static type will let you pick from a list of object members. A dynamic type will let you build a SQL query to define criteria for the list.

Membership Type

☒ **Dynamic** - Use this option to define a criteria for the members

☐ **Static** - Use this option to enter a static list of members

< Back Next > Cancel

Add Membership List page

Membership Type

Select from these values:

- *Dynamic*: Select to choose a dynamic list of members. When you click Next, a search page appears based on the security object that you selected on the second Add Membership List page.
- *Static*: Select to choose a static list of members. When you click Next, a page appears based on the security object that you selected on the second Add Membership List page.

Next

Click to go to the next page. The system displays a new page based on the selections that you made on the previous pages.

Adding Members to a Static Membership List

Access the Add Membership List (static) page.

Add Membership List

Roles Customize | Find | View All | First 1-3 of 3 Last

*Role Name		
Account Manager		
Catalog Administrator		
Account Administrator		

Add Membership List (static) page

This page displays different fields based on the security object you selected on the previous page. Selected the setID (if this field appears) and the role, customer, partner, partner contact, or person that you want to add to the membership list. Click the Add button to add new members.

Choosing the Dynamic Criteria for the Membership List

Access the Add Membership List (dynamic) page.

Add Membership List

Choose dynamic criteria for the Partners

The criteria you choose will determine the Partners included in the membership. Select the Preview button to view the Partner members that meet the criteria you entered.

▼ **Preview Partner Members** Customize | Find | View All | First 1-3 of 3 Last

Partner Name	DUNS Number	Address	City	State	Country	Partner Status
Alliance Group		14410 Union Ave	San Jose	CA	USA	Active
Quality Cooling		100 Mount Diablo Road	Pleasanton	CA	USA	Active
EIP, Inc.		800 W Shoreline Ave	Mountain View	CA	USA	Active

▼ **Choose Dynamic Criteria**

*SetID = SHARE

Company begins with

DUNS begins with

Status =

Partner Program Name begins with

Phone begins with

Address begins with

City begins with

State begins with

Postal begins with

Country = United States

Company ID begins with

Add Membership List page

Select or enter the criteria that you want to use to create a membership list. The system uses the criteria that you select to create a dynamic membership list. To view the results of the criteria that you enter, click the Preview button. When you are satisfied with the results, click the Finish button at the bottom of the page.

Adding View List Names and Descriptions

Access the View List page.

Add View List page

Enter a name for the view list that you want to create. Select the *Active* status. Enter text that describes the type of view list that you are creating.

Selecting View Objects and Options

Access the Add View List page.

Add View List page

Security Object

Select the security object that you want to use for your view list. Choose from one of these delivered values:

- *Catalog*
- *Customer*
- *Hold Codes*
- *Performance Metric*
- *Financial Accounts*

Note. You can also create your own security object and select it from this list.

View Applies To

Select one of these values to indicate to whom you want the view list to apply:

- *All:* Select this value if you want the view list to apply to all members associated with the security object.
- *Multiple Members:* Select this value if you want the view list to apply to select group of members that are associated with the security object. When you click Next, the system displays the next Add View List page, where you can select the view type that you want to use (either dynamic or static).
- *Single Member:* Select this value if you want the view list to apply to a single member associated with the security object. When you click Next, the system displays the page that is associated with the security object (either hold codes, catalogs, performance metrics, or customers).

Next

Click to go to the next page. The system displays a new page based on the selections that you made on the previous Add View List pages.

Selecting the View Type

Access the Add View List page.

Add View List page

View Type

Select one of these values:

- *Dynamic:* Select to define criteria for a dynamic list of members that you want included in your view list. When you click Next, a search page appears based on the security object that you selected on the second Add View List page.
- *Static:* Select to choose a static list of members. When you click Next, a page appears based on the security object that you selected on the second Add View List page.




Next

Click to go to the next page. The system displays a new page based on the selections that you made on the previous pages.

Adding Members to Static View List

Access the Add View List (static) page.

Add Customer To View List

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

*SetID	Customer Name
CRM02	MD Engineering

Add View List (static) page

This page displays different fields based on the security object you selected on the previous page. Selected the setID (if this field appears) and the catalog, customer, hold code, or performance metric that you want to add to the view list.




Choosing the Dynamic Criteria for the View List

Access the Add View List page.

Add View List




Choose dynamic criteria for customers

The criteria you choose will determine which customers are included in the view list. Click the Preview button to view the customers that meet the criteria you entered.

Preview Customer Members Customize | Find | View All |  First  1-2 of 2  Last

Customer Name	Address	City	State	Country
Maretec Ltd.	240 Northumberland Drive	Sydney	NSW	AUS
Balmoral Wholesalers	754 Pacific Highway, Chatswood	Sydney	NSW	AUS

Choose Dynamic Criteria

Name =
 SetID = 
 First Name begins with
 Last Name begins with
 Role =
 Address begins with
 City begins with
 State begins with NSW
 Postal begins with
 Country = AUS 
 Region = 
 Partner On Order bind

Add View List page

Select or enter the criteria that you want to use to create a view list. The system uses the criteria that you select to create a dynamic view list. To see the results of the criteria that you enter, click the Preview button. When you are satisfied with the results, click the Finish button at the bottom of the page.

Defining Functional Options

Access the Functional Options page.

Functional Option

Save

Search

Next

Previous

Refresh

Add

Personalize

Functional Option Code

AFTS

Functional Option

Automatic Fund Transfer

Functional Option Definition

*Functional Option

Automatic Fund Transfer

Description

Automatic Fund Transfer

Conflict Resolution

☐ Revoke Wins

Amount Related

☒ Related To Amount

☐ Maximum Amount Wins

☒ Use Conditional Operator

Base Currency

US Dollar

Functional Options page (1 of 2)

Display Logic

Application Class ID

Application Class Path

Option Value Translate Field

Default Message Set

Message Set Number

18146

Messages

Customize

Find

First

1 of 1

Last

*Denial Reason

Denied. Reason: 2 Signers required

Add Message

Audit Details

Functional Options page (2 of 2)

Functional Option and Description	Enter a name for the functional option and then enter a description.
Revoke Wins	Conflicts may happen when a user is associated with multiple security profiles using functional options that conflict or when the same security profile has overrides for conflicting functional options. Select this check box if you want the system to not override the security for the functional option that you are creating when there are conflicts within or among different security profiles. <div>Note. If one functional option group grants an option and another revokes it, the revoke takes precedence. If the Revoke Wins check boxes are not selected in the same scenario, the option is granted.</div>

104

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Related to Amount	Select to enable amount-related fields during the setup of functional option groups and specific functional options within the security profile.
Maximum Amount Wins	Select this check box to indicate that you want the maximum amount to win when there are functional options that conflict within or among different security profiles
Use Conditional Operator	Select to enable the conditional operator field during the setup of functional option groups and specific functional options within the security profile for amount-related fields.
Base Currency	Select the currency that is used most often for the functional option that you are creating.
Application Class ID, Application Class Path, and Option Value Translate Field	<p>Use these fields if you are writing PeopleCode programs required to evaluate the functional option. Select the ID and path of the application class that the system carries out when a user accesses the function or when the program runs. Also, you can specify a value translate field with values that will be interpreted by the calling application to perform a specific functional action. For example, the display template uses a translate field that makes the fields display-only or editable.</p> <p>See <i>PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook</i>, “Configuring Display Templates”.</p>
Message Set Number and Denial Reason	Select the message that you want the system to display if a user is denied access to the function.

Defining Functional Option Groups

Access the Functional Option Group page.

Functional Option Group

Save | Search | *Next | Previous | Refresh | Add | Personalize

Functional Option Group Code MKT_FIELDS **Functional Option Group** Secured Marketing Fields

Functional Option Definition

***Functional Option Group** Secured Marketing Fields

Description Secured marketing fields for a partner user.

Functional Options Customize | Find | First 1-2 of 2 Last

Functional Option	Amount Related	Option Value	Revoke
* Functional Option			
Marketing Display Only Fields	<input type="checkbox"/>	Display Onl	<input type="checkbox"/>
Marketing Hidden Fields	<input type="checkbox"/>		<input checked="" type="checkbox"/>

Add Functional Option

Audit Details

Functional Option Group page

Use functional option groups to group functional options. You may then associate the functional option groups with security profiles. Creating functional option groups and using them with security profiles can help make security maintenance faster and more efficient.

Functional Option Group and Description Enter a name for the functional option group and then enter a description.

Functional Option Tab

Functional Option Select the functional options that you want to include in the functional option group.

Option Value Select the value that you want to use for the functional option. This field is available for entry only if a translate field was set up on the functional option.

Revoke Select this check box if you want the system to override the security for the functional option when there are conflicts within or among different security profiles.

Note. Revoke applies to the functional option only (for example, does a user have authorization to transfer money). If one functional option group says yes and another says no, the functional option that has the *Revoke Wins* check box selected wins and resolves the conflict.

For transfer amounts, there is another type of conflict resolution called *Max Amount Wins*. In this situation, if one functional option group gives you access to 2000 USD and another gives you access to 3000 USD, the maximum amount wins and you have the authority to transfer up to 3000 USD.

Add Function Option Click to add a new row in the functional option grid.

Amount Related Tab

The fields that appear on this page are used if the functional option is associated with an amount field.

Conditional Operator Select the conditional operator (for example, equal to, less than, greater than, and so on) that you want to use for the functional option.

Amount Enter the amount that you want associated with the conditional operator for the functional option.

Denial Reason Select the reason that you want the system to display if the user is denied access to the transaction related to the functional option.

For example, let's say you have given order capture representatives the ability to override prices. At some point in the season, you may want all of them to be denied from overriding prices on the items that you sell. You can go to the functional option group definition and set the Revoke Wins check box. From that point onward, the order capture representatives are denied from doing price overrides. You can set up similar situations for leads, opportunities, cases, and so on.

Adding Functional Option Groups and View Lists to the Security Profile

Access the Security Profile page.

Security Profile

Save Run Search Next Previous Add Personalize

Security Profile Name Appliance High Value Partners **Status** Active

Security Profile Membership

Security Profile Definition

*Name Appliance High Value Partners *Status Active

Description Western region customers that high value partners can see in Appliances.

Functional Option Group

Functional Option Group	Description
Secured Marketing Fields	Secured marketing fields for a partner user.

Add Functional Option Group

Security Profile page (1 of 2)

View List

View List	Description	Security Object	Type	Status	Last Refresh Date
Appliance Western Customers	Appliance companies and consumers in the Western region.	Customer	Dynamic	Active	03/05/2004 10:19AM

Add View List

Audit Details

Save Run Search Next Previous Add Top of Page

Security Profile page (2 of 2)

Defining security profiles involves the granting of view lists and/or functional options. You then grant or associate one or multiple membership lists with the security profile. An enterprise administrator or enterprise channel manager should know how to create and maintain security profiles, as well as understand how security is impacted when a security profile changes.

Warning! Inactivating a security profile removes the associated membership and view lists

Name and Description

Enter a name for the security profile and then enter a description.

Add Functional Option Group

Click to access the Functional Options Group page, where you can select the functional option groups that you want to include in the security profile. You can also use this page to view the functional options that are associated with the functional option group. The Enterprise Administrator who is assigning the Functional Option Groups must be aware of the groups that make sense for a given Membership list. Out of the box, all functional options and functional options groups that are delivered by PeopleSoft work with the 'Role' Security Membership Object. The only exception is the Financial Account Holders.

Add View List

Click to access the Add View List page, where you can select the view lists that you want to include in the security profile.

Run

Click to access the Refresh Dynamic Lists page, where you can set up a process to periodically refresh the lists that you have associated with the security profiles that you created. View lists and Membership lists that are built based on dynamic criteria are refreshed.

Adding Membership Lists to the Security Profile

Access the Security Profile - Membership page.

Security Profile

Save Run Search Next Previous Add Personalize

Security Profile Name Appliance High Value Partners **Status** Active

Security Profile Membership

Membership List

Membership List	Description	Security Object	Type	Status	Last Refresh Date
Appliance High Value Partners	Partners participating in the partner programs for appliances.	Partner	Dynamic	Active	03/05/2004 10:19AM

Add Membership List

▶ **Audit Details**

Save Run Search Next Previous Add Top of Page

Security Profile - Membership page

Add Membership List

Click to access the Add Membership List page, where you can select the membership lists that you want to include in the security profile.

Run

Click to access the Refresh Dynamic Lists page, where you can set up a process to periodically refresh the lists that you have associated with the security profiles that you created. View lists and Membership lists that are built based on dynamic criteria are refreshed.

Setting Run Controls for the List Build Process

Access the Refresh Dynamic Lists page.

Refresh Dynamic Lists page

Use this page to refresh the lists, security objects, and profiles that you have created to implement security for your PeopleSoft Enterprise CRM environment. If the content of the lists, objects, and profiles changes frequently, you can set up this process to run daily, every few minutes, or every few hours.

Process Type

Select one of these values based on the type of list that you want to refresh:

- *Dynamic List Refresh.*
- *New and Updated List Members.*
- *Data Integrity.*

Process Scope

Select one of these lists or objects that you want to refresh:

- *All Objects*
- *Security Object*
- *Security Profile*
- *Membership List*
- *View List*

Note. If you select *All Objects*, you do not need to specify the objects that you want to refresh. If you select any other value, you must use the field that corresponds to your selection to select a list, profile, or object name.

Entering Static Menu Transfer Paths

Access the Static Menu Transfer page.

Static Menu Transfer

Security Object Definition

Static List Navigation Partner Static Member List

***Menu Name**

***Menu Bar Name**

***Item Name**

***Panel Item Name**

Audit Details

Date Created	11/13/2003 1:02PM PST	SSURAPAN
Last Modified	11/13/2003 1:02PM PST	SSURAPAN

Static Menu Transfer page

Use this page to create static menu transfer paths for entering or viewing static list data that is either dynamically created or manually entered. The static list navigations that you create on this page appear in the Static List Navigation drop-down list box on the Security Object page. Static list navigation is used when you create a security profile.

CHAPTER 5

Working with Notes and Attachments

This chapter provides an overview of notes and attachments and discusses how to:

- Set up note types.
- Create standard notes and product notes.
- Enter and view notes.
- Add attachments to notes.

Understanding Notes and Attachments

This section discusses:

- Notes in PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM).
- Attachments.
- Note types.

Notes in PeopleSoft Enterprise CRM

You can view and update notes in PeopleSoft Enterprise CRM in two ways:

1. The Notes List (RB_NOTES_LIST) component.
2. Notes pages on CRM components and transactions.

The Notes List Component

This component summarizes notes that are entered on commonly used PeopleSoft Enterprise CRM components: Lead, Opportunity, Order, Case, Customer, and Contact, and enables you to select a note and transfer to the Notes page in the component to view and update note details.

Notes Pages

All PeopleSoft Enterprise CRM components that can have notes attached to them use the same interface; however, the Notes page itself might vary slightly depending on the parent object. For example, case notes and order notes have a visibility field that determines whether self-service users can see the note when they look at the parent object. Other objects that are not accessible through self-service do not have this field.

Note Details

The note details view displays complete information for a single note, including a list of attachments that is associated with the note.

Notes Summary

The notes summary view lists all existing notes for the component.

Notes pages on some components include a summary notes list on the same page as the note details; for other components, the summary notes list is on a separate page. The summary notes list might also be part of a more general page.

Case notes can be associated with the case itself or with a resolution in the case. The notes summary view that is in the Case component displays both types of notes together. A resolution icon identifies notes that are part of a resolution.

Attachments

When you add an attachment to a note, you identify the file to attach. Once you identify the file, the system uploads the attachment to an attachment server. The attachment server stores attachment files, which ensures that the attachments are available to all users. You configure the system by using the Uniform Resource Locator (URL) Maintenance page to specify a URL for each component that supports attachments. This setup is part of the PeopleSoft Enterprise CRM installation process.

See the installation guides on the PeopleSoft Customer Connection website.

Files stored as attachments have two names. The original name of the file at the time it was uploaded is stored in the ATTACHUSERFILE field. A system-generated unique file name, stored in the ATTACHSYSFILENAME field, is the actual name of the file on the file server. The different objects that store attachments have different file-naming patterns for generating the ATTACHSYSFILENAME value, but all patterns are based on the ATTACHUSERFILE file name.

For example, system names for case attachments are formed by concatenating the case number, the letter *C*, the note sequence number, the letter *R*, the attachment sequence number, and the original file name. The following code represents this pattern:

```
CASE_ID||"C"||NOTE_SEQ_NBR||"R"||ATTACH_SEQ_NBR||ATTACHUSERFILE
```

Except in the Product component, attachments are associated with a note rather than associated with the note's parent object. When you click the link for an existing attachment, the system launches the attachment. If the attachment is an executable or batch program, the system runs the program. If the attachment is any other type of file, the system handles it according to the operating system's rules, either opening the file in a new browser window, prompting for a location to download the file, or offering a choice between these two actions.

Note Types

Most differences in the Notes page for different parent objects are self-explanatory. However, there is one hidden difference: the Note Type field that appears in some components derives its values from different places depending on the parent object.

This table lists the page where you define valid note types for objects that use note types:

Parent Object	Source of Valid Note Types
Business objects: Company, Consumer, Representative, and Site	Note Type page (BC_NOTETYPE_TBL), found under Set Up CRM, Common Definitions, Notes

Parent Object	Source of Valid Note Types
Case and Solution	Case and Solution Note Type page (RC_NOTETYPE), found under Set Up CRM, Common Definitions, Notes
Order/Quote, Services Management Order	Product Note Type page (NOTE_TYPE), found under Set Up CRM, Common Definitions, Notes
Campaign Detail	Translate (xlat) table.
Other objects	Notes for other objects do not include a Note Type field.

See Also

Chapter 5, “Working with Notes and Attachments,” Setting Up Note Types, page 113

Setting Up Note Types

This section lists the pages used to set up note types.

Pages Used to Set Up Note Types

Page Name	Object Name	Navigation	Usage
Note Type	BC_NOTETYPE_TBL	Set Up CRM, Common Definitions, Notes, Note Type, CDM Note Type	Set up note categorization codes that you can reference on the notes pages available in the Company, Partner Company, and Person components.
Case and Solution Note Type	RC_NOTETYPE	Set Up CRM, Common Definitions, Notes, Case and Solution Note Type, Case and Solution Note Type	Set up note types that you can reference on the notes pages available in the Case and Solution components.
Product Note Type	NOTE_TYPE	Set Up CRM, Common Definitions, Notes, Product Note Type, Product Note Type	Set up note types that you can reference on the notes pages available in the Product component.

Creating Standard Notes and Product Notes

This section discusses how to:

- Create standard notes.

- Create product notes.

Pages Used to Create Standard Notes and Product Notes

Page Name	Object Name	Navigation	Usage
Standard Notes	STD_NOTE	Set Up CRM, Common Definitions, Notes, Standard Notes, Standard Notes	Create a standard note.
Notes	PROD_NOTE	Product CRM, Product Notes, Notes	Create product notes.

Creating Standard Notes

Access the Standard Notes page.

Standard Notes

SetID CRM02 Standard Note Code INFO

Find | View All First 1 of 1 Last

*Effective Date 05/13/2004 *Status Active

*Description Information about returns

*Note Type

Text To return this product, call customer service at 1-800-222-1122

Search Key Words View All First 1 of 1 Last

Print On Document First 1 of 1 Last

PACK Packing List

Standard Notes page

Text Enter up to 256 characters of text. You can modify the text, but you cannot have more than one entry.

Search Key Words Enter keywords to select notes for reporting.

Print On Document Not applicable to standard notes.

Creating Product Notes

Access the Product Notes page.

Search Key Words Enter keywords to select notes for reporting.

Print On Documents

Not applicable for product notes.

Entering and Viewing Notes

This section discusses how to:

- View lists of notes.
- Enter notes.

Note. Because Notes pages are always accessed within the context of a component (such as an order capture or campaign), navigational paths are not listed in this table. For the navigational path, refer to the component documentation.









Pages Used to View and Enter Notes

Page Name	Object Name	Navigation	Usage
Notes List - Lead Notes	RB_NOTES_LIST_LEAD	Customers CRM, Notes List, Lead Notes	View a list of lead notes and access note details.
Notes List - Opportunity Notes	RB_NOTES_LIST_OPP	Customers CRM, Notes List, Opportunity Notes	View a list of opportunity notes and access note details.
Notes List - Case Notes	RB_NOTES_LIST_CASE	Customers CRM, Notes List, Case Notes	View a list of case notes and access note details.
Notes List - Customer Notes	RB_NOTES_LIST_CUST	Customers CRM, Notes List, Customer Notes	View a list of customer notes and access note details.
Notes List - Contact Notes	RB_NOTES_LIST_PRSN	Customers CRM, Notes List, Contact Notes	View a list of contact notes and access note details.
Notes List - Consumer Notes	RB_NOTES_LIST_CONS	Customers CRM, Notes List, Consumer Notes	View a list of consumer notes and access note details.

Page Name	Object Name	Navigation	Usage
Notes	PROD_ATT, RA_CAMPAIGN_NOTE, RA_CM_NOTE_SUMRY, RA_CM_ATCH_SUMRY, RA_CONTENT_NOTE, RA_CNT_NOTE_SUMRY, RA_LIST_NOTE, RA_LST_NOTE_SUMRY, RA_OFFER_NOTE, RA_OFR_NOTE_SUMRY, RB_EMAIL_NOTE, RC_CASE_NOTE, RC_CASE_RSLN_NOTE, RC_SOLN_NOTES, RD_COMPANY_NOTE_2, RD_NOTES, RD_PERSON_NOTES, RD_SITE_NOTE, RD_SITE_NOTE_2, RE_NOTES, RE_NOTE_SUMMARY, RF_RMA_NOTE, RF_SERVICE_NOTE, RF_SO_NOTE, RO_NOTE, RQ_DEFECT_NOTE, RQ_DEF_NOTE_SUMRY, RQ_DEF_ATCH_SUMRY, RQ_FIX_NOTE, RQ_FIX_NOTE_SUMRY, RQ_FIX_ATCH_SUMRY, RSF_LEAD_NOTE, RSF_OPP_NOTE, RSP_PLANNING_NOTE	Varies by component: refer to the documentation for the parent component.	Create or update notes and add attachments.

Viewing Lists of Notes

Access the Notes List page for a lead, opportunity, customer, contact, or consumer.

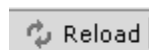
Note Details		Note Summary		
	Customer Name	Source ID	Added By	Date/Time Added
	Grandma's Kitchens International	512	SREDFORD	11/06/2001 7:58:36AM
	Grandma's Kitchens International	512	SRAY	11/10/2001 1:26:52PM
	Fast Grandma's Restaurants	516	SREDFORD	11/06/2001 8:10:23AM
	Grandma Kitchens Foods Inc.	517	SREDFORD	11/06/2001 8:16:57AM
	Grandma Kitchens Foods Inc.	517	SREDFORD	11/06/2001 8:20:42AM
	Grandma's Breakfast Bakery	527	SAMPLE	11/07/2001 8:35:22AM
	Shoreview Medical	CI00532	SAMPLE	09/23/2002 4:48:20PM
	Shoreview Medical	CI00532	TMURPHY	03/05/2004 11:52:12AM

▼ Search

Notes List - Customer Notes page: Note Details tab

Note Details

Select the Note Details tab.








Click to access the component for the listed lead, opportunity, customer, contact, or consumer. You can access the Notes page for the component to view notes.

Note. When you click this link, the Lead, Opportunity, Company, or Person component and the associated notes page appear in a new browser window.

Note Summary

Select the Note Summary tab.

Note Details		Note Summary	
	Customer Name	Note Summary	
	Grandma's Kitchens International	Grandma's Kitchen Int'l - Account update Nov 2001	
	Grandma's Kitchens International	This is a great account	
	Fast Grandma's Restaurants	Fast Grandma's Account Update - Nov 2001	
	Grandma Kitchens Foods Inc.	Grandma's Kitchen Manuf. - Account Update Nov 2001	
	Grandma Kitchens Foods Inc.	Public Announcement - Partner with GKF Nov 2001	
	Grandma's Breakfast Bakery	Grandma's Breakfast Bakery	
	Shoreview Medical	Important Customer	
	Shoreview Medical	Customer is an Important Reference for Us	

▼ Search

Use Saved Search

Notes List - Contact Notes page: Note Summary tab

The contact name and note summary appear in this page region.

Entering Notes

Access the Notes page.

Note. This screen shot is from the Company component. It is typical of Notes pages throughout PeopleSoft Enterprise CRM.

Notes Summary

Subject and Details	Attachment(s)	Added By	Date Added
This is a great account Wished I could be on the team		Stu Marx	11/10/2001 1:26PM
Grandma's Kitchen Int'l - Account update Nov 2001 Grandma's Kitchen is a fast growing organization (double digit growth in the last 5 years) that we intend to stay a preferred supp...		Stu Marx	11/06/2001 7:58AM

Note Details

Added 11/10/2001 1:26PM Stu Marx

***Subject** This is a great account

Note Type [Dropdown]

Start Date [Calendar] **End Date** [Calendar]

Details Wished I could be on the team

Buttons: Add Note, Apply Note, Add an Attachment

Notes page

Notes Summary

A summary of existing notes for the component appears in this page region. If there are attachments for the note, the number of attachments appears in the Attachments column.

Note Details

If no notes exist for the component, this page region is titled Add Note.

Subject

Enter a short summary of the note. If you do not enter a value, the system enters the first fifty characters of the Details field into this field when you save the note.

Note Type

Select a classification for the note. Values are defined differently depending on the parent object. This functionality is not available in all components.

See [Chapter 5, "Working with Notes and Attachments," Note Types, page 112](#).

Details

Enter the full text of the note.

Apply Note

Click to update the Notes Summary list with the note that you entered.

Note. Click the Apply Note button to add the note to the Notes Summary grid. The note is not saved to the component until you save the component.

Add an Attachment

Click to add an attachment to the note.

Adding Attachments to Notes

This section discusses how to add attachments to notes.

Selecting a File to Add as an Attachment

To add an attachment to a note:

1. Access the Notes page for the object to which you are adding an attachment.

Note. Normally you add attachments to notes. In the Product component, however, you add attachments directly to the product.

2. Click the Add an Attachment button.

Enter the full path (including the file name) of the file to attach.

3. In the dialog box that appears, enter the full path name of the file to attach, or browse to the file.
4. Click the Upload button.

The system uploads the specified file to the server that is configured to store all of the PeopleSoft Enterprise CRM attachments. Large files may take a long time to upload. When the upload is complete, the system displays the Notes page again. If the upload was successful, the file appears on the page.

5. Add descriptive information about the file.

If the parent object is a note, you can also use the note to record a longer comment about the attachment.

6. Save the component.

CHAPTER 6

Using Interactive Reports

This chapter provides overviews of interactive reports and delivered system data for interactive report and discusses how to launch interactive reports.

Understanding Interactive Reports

This section discusses:

- Interactive reports and the business analysis modeler (BAM).
- Delivered report and query definitions
- Delivered BAM server definitions

Interactive Reports and BAM

PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM) interactive reports are based on the PeopleSoft business analysis modeler tool that PeopleSoft delivers with PeopleSoft Enterprise CRM. The business analysis modeler contains several predefined models for use with interactive reports. You can also use the PeopleSoft business analysis modeler and other reporting tools such as Crystal Reports to create additional interactive reports or modify the ones that PeopleSoft delivers.

Use the interactive reports to view transactional data in multidimensional online reports. For example, a PeopleSoft Call Center business analysis modeler report might have two dimensions: customer and product. This enables users to display the number of cases in four ways—customer, product, customer within product, or product within customer.

Interactive reports can have more than two dimensions, which enable users to organize data in a variety of ways that serve various business purposes. Users drag and drop the available dimensions to reconfigure the smart view as they use it. In the call center example, a user might add month as a third dimension.

Users can filter interactive report data by selecting a single value for any dimension. For example, a user can limit a report so that only cases for one customer, organized by product and then by month, appear. This provides the user with an overview of the products that are giving the customer trouble and whether the number of cases that are reported against each product is decreasing over time.

The PeopleSoft BAM tool is a PeopleTools product. For information on installing and setting up interactive reports using BAM, see the references listed.

See Also

PeopleSoft Customer Connection website

PeopleSoft Enterprise Components for CRM 8.9 PeopleBook.

Delivered Report and Query Definitions

These are the interactive report definitions that PeopleSoft Enterprise CRM provides:

Report ID	Report Description	Application
CR_RA_WHATIF	Campaign Performance/ Forecast	Marketing
CR_RC_HD_SLM_DBOARD	Helpdesk SLM Analysis	Support
CR_RC_MGMT_DBOARD	Support Case Analytics	Support
CR_RF_SUP_SLM_DBOARD	Support SLM Analysis	Field Service
CR_RF_MGMT_DBOARD	FieldService Dashboard	Field Service
CR_RF_SO_AGE	Service Order Aging Analysis	Field Service
CR_RF_SO_AGE_CUST	Service Order Aging (Customer)	Field Service
CR_RF_UTILIZE_RATE	Utilization Rate Analysis	Field Service
CR_RF_UTILIZE_RATE_PG	Utilization Rate Analysis PG	Field Service
CR_RG_CHG_METRICS	Change Request Metrics	Help Desk
CR_RG_FWD_SCHD	Forward Schedule of Changes	Help Desk
CR_RO_ORD_METRICS	Enterprise Order Metrics	Order Capture
CR_RO_ORD_METRICS_BU	Order Metrics for Single BU	Order Capture
CR_RO_ORD_REVENUE	Enterprise Order Revenue	Order Capture
CR_RO_ORD_REVENUE_BU	Order Revenue for Single BU	Order Capture
CR_RS_FCAST_COMP	Sales Compare of Forecasts	Sales
CR_RS_FORECAST	Sales Activity Forecasts	Sales
CR_RT_LEAD_ACCEPT	Telemarketing Lead Acceptance	Telemarketing
CR_RT_LEAD_QUALITY	Telemarketing Lead Quality	Telemarketing
CR_RT_SALES_CONV_RATE	Telemarketing Sales Conv Rate	Telemarketing
CR_RT_SALES_EFFECT	Telemarketing Sales Quality	Telemarketing
CR_RY_DIALOG	Dialog Performance Report	Online Marketing
INSTALLATION_TEST	Installation Test	All products

Each report has an accompanying query definition that is similarly named to the report definition.

Servers

These are the BAM server definitions that PeopleSoft Enterprise CRM provides:

Server ID	Description
BAM_SERVER_CSA	BAM Server for Sales
BAM_SERVER_FS	BAM Server for FieldService
BAM_SERVER_HD	BAM Server for HelpDesk
BAM_SERVER_MKT	BAM Server for Marketing
BAM_SERVER_OCI	BAM Server for Orders & Quotes
BAM_SERVER_OMK	BAM Server for Dialog
BAM_SERVER_SU	BAM Server for Support
BAM_SERVER_TM	BAM Server for Telemarketing
SGOPALAK080801	SGOPALAK080801 Server

Launching Interactive Reports

Each PeopleSoft Enterprise CRM application that delivers an interactive report provides documentation for viewing that specific report.

See Also

PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook, “PeopleSoft Call Center Interactive Reports”

PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook, “Working with Interactive Reports for PeopleSoft Order Capture”

PeopleSoft Enterprise CRM 8.9 Marketing Applications PeopleBook, “Using Interactive Reports in PeopleSoft Marketing Applications”

PeopleSoft Enterprise Sales 8.9 PeopleBook, “Understanding PeopleSoft Sales Interactive Reports”

PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook, “PeopleSoft Call Center Interactive Reports”

CHAPTER 7

Setting Up Currencies

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

- Set up currencies.
- Calculate currency exchange.

See Also

PeopleSoft Enterprise Components for CRM 8.9 PeopleBook

Understanding Currencies

This section discusses:

- Currency management in PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM).
- Direct and indirect rate quotations.
- Triangulation.
- Automatic reciprocation of quote methods.

Currency Management in PeopleSoft Enterprise CRM

PeopleSoft Enterprise CRM enables you to manage financial information in multiple currencies and perform currency conversions. The Currency Code table that PeopleSoft Enterprise CRM delivers defines many common currencies that are identified by the International Standards Organization (ISO) standard, including the European common currency (euro). You can update the currency definitions on this table or enter new ones.

Note. The Currency Code table supports the ISO standard of zero, two, and three decimal positions.

PeopleSoft supports direct and indirect rate quotation, quote units, and triangulation to provide you with flexible tools to convert and manage multicurrency operations. The currency quotation method controls how a stored rate appears and how an entered rate is interpreted and stored in the database.

You can set up a currency quotation method for each from and to pair of currencies that you use. Define currency quotation options before entering and calculating rates.

Direct and Indirect Rate Quotations

An exchange rate is the price of one currency, such as the British pound, in terms of another currency, such as the U.S. dollar. Exchange rates are quoted directly or indirectly. Most countries use the direct method. With this method, the exchange rate indicates how much of the local currency is exchanged for one unit of the foreign currency. For example, suppose that one has to pay .6326 pounds to obtain one dollar, the direct quotation is 1 USD = .6326 GBP.

With the indirect method the exchange rate is expressed as the amount of foreign currency that is required to purchase one unit of the domestic currency. In the preceding example, the indirect quotation is 1 GBP = 1.5814 USD.

Triangulation

Triangulation is used in hyperinflationary environments in which all conversions to the local currency are done through a reference currency—a stronger, more stable currency, such as the U.S. dollar.

For currency pairs that triangulate, you do not typically maintain rates online. Instead, the Cross Rate/Triangulation Generation SQR (Structured Query Report) uses these three exchange rates:

- The rate between the from and reference currencies.
- The rate between the reference and to currencies.
- The cross rate between the from and to currencies.

Typically, you do not maintain these rates directly.

Set up the currency quotation methods correctly to yield the correct results for triangulation. Two fields store the rate conversion factor: RATE_DIV and RATE_MULT. With these in mind, the currency conversion formula is always (From currency / RATE_DIV) * RATE_MULT = To currency.

For example, converting from the Russian rouble (RUR) to the Brazilian real (BRL) through the U.S. dollar (USD) is a two-step conversion. First, the RUR is converted to the USD using the appropriate triangulated rate (which uses the RUR to USD component of the triangulated rate that is stored in RATE_DIV). Second, the USD is converted to the real by using the fixed exchange rate (which uses the USD to BRL component of the triangulated rate that is stored in RATE_MULT).

It was a legal requirement to use triangulation to convert currencies participating in the euro prior to January 1, 2002. Even after an enterprise has switched over to the euro, it is necessary to keep historical data available in the national currency unit in order to maintain an audit trail. In most countries, national law requires enterprises to keep accounting records in their original form for at least 5 to 10 years. This is important to avoid synchronization problems between the legacy and the converted systems. For example, representing amounts dated before the euro came into existence in euro could cause anomalies when comparing data that was collected during the floating-rate era before January 1, 1999.

Conversion of historical data requires that you convert all instances of the same data in exactly the same way. This can cause rounding differences with non-normalized data, as is commonly the case in data warehouses that support management information systems (MIS) or decision support systems (DSS). Each organization must decide how significant such differences are in the context of the data use, which might be merely for internal trend analysis.

Automatic Reciprocation of Quote Methods

The Currency Quotation Method page automatically reciprocates itself. For example, if you define the conversion of USD to GBP as indirect, the system automatically creates this record to indicate a quote method of direct. If you change the quote method on the GBP to USD record, the system automatically updates the USD to GBP record.

This table lists each possible value with its reciprocal value:

Page Element	Value (for RUR to BRL)	Reciprocal Value (for BRL to RUR)
Rate Quotation Basis	Direct Indirect	Indirect Direct
Quote Units	Any value	Same value
Rate Decimal Positions	4 (default value)	Same value
Auto Reciprocate	Yes No	Yes No
Triangulate	Yes No	Yes No
Reference Currency	Any value	Same value
Primary Visual Rate	From - To (RUR - BRL) From - Reference (RUR - USD) Reference - To (USD - BRL)	From - To (BRL - RUR) Reference - To (USD - RUR) From - Reference (BRL - USD)
Cross-Rate Allow Override	Yes No	Yes No
Cross-Rate Recalculate	From - Reference (RUR - USD) Reference - To (USD - BRL)	Reference - To (USD - RUR) From - Reference (BRL - USD)

Setting Up Currencies

To set up currencies, use the Currency Code (CURR_CD_TABLE) and Currency Quotation Method (CURR_QUOTE_PNL) components.

This section discusses setting up currencies in PeopleSoft Enterprise CRM.

Pages Used to Set Up Currencies

Page Name	Object Name	Navigation	Usage
Currency Code	CURRENCY_CD_TABLE	Set Up CRM, Common Definitions, Currency, Currency Code, Currency Code	Add or update a currency code.
Currency Quotation Method	CURR_QUOTE_PNL	Set Up CRM, Common Definitions, Currency, Currency Quotation Method, Currency Quotation Method	Set up and maintain a currency quotation method for each from currency and to currency pair.

Adding or Updating Currency Codes

Access the Currency Code page.

Currency Code

Currency Code

Currency Code: GBP

Definition

Find | View AllFirst1 of 1Last

*Effective Date:01/01/190031

*Status:Active+ -

*Description:Pound Sterling

Short Description:Pound

Currency Symbol:

Country:GBRUnited Kingdom

Decimal Positions:2

Scale Positions:

Currency Code page

Currency Symbol Enter a currency symbol. You can change the currency symbol that is delivered with the application or enter new symbols for currencies.

Scale Positions Enter the number of numerals that you want to appear to the left of the decimal. The system rounds numbers accordingly for display, although it actually stores data with full precision in the database.

For example, suppose that you want all million dollar amounts to appear as the number of millions without the zeros, enter 6 as the scale position. In this case, 24,000,000 appears as 24, but it is stored in the database as 24,000,000.

Setting Up the Currency Quotation Method

Access the Currency Quotation Method page.

Currency Quotation Method

Currency Quotation Method

From Currency Code: GBP Pound Sterling

To Currency Code: USD US Dollar

Quote Method Find | View All First 1 of 1 Last

Effective Date: 01/01/1990 **Status:** Active

Rate Quotation Basis

☒ Direct ☐ Indirect ***Quote Units:** 1 ☒ Auto Reciprocate

Triangulation Options

☐ Triangulate **Reference Currency:**

Primary Visual Rate

☐ Not Applicable

Cross-Rate

☐ Allow Override

Recalculate

☐ Not Applicable

GBP 1 = USD x.xxxx

Currency Quotation Method page

Rate Quotation Basis

Direct

Select if you want direct quotes for currency pairs. For example, for a conversion of dollars to euros, a direct quote indicates that 1 USD = x.xxxx EUR.

Note. You must still classify currency pairs that triangulate as either direct or indirect for use in displaying the calculated cross rate.

Indirect

Select if you want indirect quotes for currency pairs. For example, for a conversion of dollars to euros, an indirect quote indicates that x.xxxx USD = 1 EUR.

Note. You must still classify currency pairs that triangulate as either direct or indirect for use in displaying the calculated cross rate.

Quote Units

Enter any value in this field, although quote units generally have a scale of 10 (such as 10, 100, 1000). The default value for this field is 1.

Quote units, sometimes called scaling factors, are used to preserve decimal position. For example, you might state the exchange rate between roubles and dollars as 1000 RUR = 31.4169 USD instead of 1 RUR = 0.031469 USD.

Auto Reciprocate

Select to have the system automatically create or update the rate for the reciprocal currency pair whenever an exchange rate is added or updated. For example, when you enter a new USD to GBP rate, the GBP to USD rate is updated automatically. You can only automatically reciprocate currency pairs for which quotation methods are established. The check box is selected by default.

Triangulation Options

Use the Triangulation Options group box to set up triangulation between currencies.

Triangulate

Select to convert two currencies through a third currency (the reference currency).

Reference Currency

Enter the currency through which the from currency is converted. For example, when the system converts between Russian roubles and Brazilian reals, the reference currency might be the United States dollar.

Primary Visual Rate

Select the primary rate. The primary rate appears on primary pages and reports.

Allow Override

Select to enable users to override the cross rate for a triangulated currency pair. If this check box is cleared, users can only change the components of the triangulated rate. If you select this check box, you must specify which currency pair the system uses to recalculate to keep the triangulation accurate.

Recalculate

Select the method for recalculation.

Calculating Currency Exchange

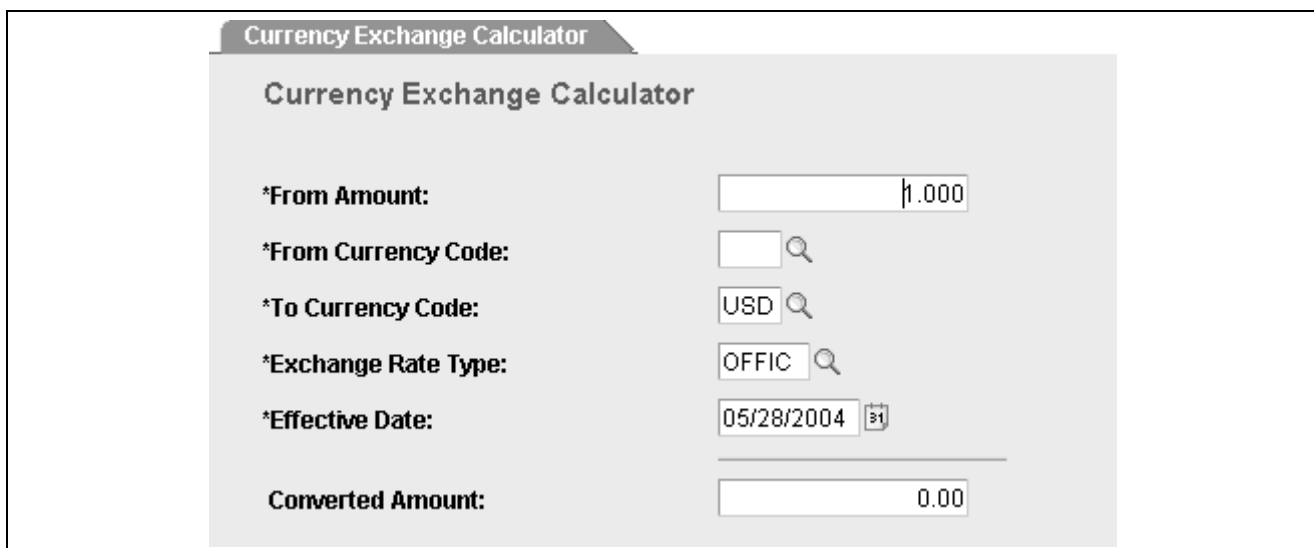
This section discusses how to calculate currency exchange.

Page Used to Calculate Currency Exchange

Page Name	Object Name	Navigation	Usage
Currency Exchange Calculator	CURRENCY_EXCHNG_PN	Set Up CRM, Common Definitions, Currency, Currency Exchange, Currency Exchange Calculator	Calculate the currency exchange between currencies.

Calculating Currency Exchange

Access the Currency Exchange Calculator page.



Currency Exchange Calculator

Currency Exchange Calculator

*From Amount: 1.000

*From Currency Code: 🔍

*To Currency Code: USD 🔍

*Exchange Rate Type: OFFIC 🔍

*Effective Date: 05/28/2004 📅

Converted Amount: 0.00

Currency Exchange Calculator page

Effective Date

Enter the date of the currency conversion. The system uses the rate that is effective on the date that you enter.

CHAPTER 8

Implementing Alternate Character

This chapter provides an overview of alternate character and discusses how to configure the system for alternate character usage.

Understanding Alternate Character

This section discusses:

- Alternate character functionality.
- Alternate character display.
- Alternate character searches.

See Also

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, “Defining Company Business Objects”

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, “Defining Person Business Objects”

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, “Defining Person Business Objects”

Alternate Character Functionality

PeopleSoft Enterprise Customer Relationship Management (PeopleSoft Enterprise CRM) provides alternate character functionality that supports the need in Japanese and Cantonese (Hong Kong) markets to represent proper nouns phonetically and in their native formats. This functionality enables PeopleSoft Enterprise CRM to validate double-byte characters in alternate character fields.

To implement alternate character functionality, you must have installed a Japanese- or Cantonese-enabled database and a double-byte-enabled operating system. The alternate character architecture and the related language table architecture enable users to enter data using both single-byte and double-byte character sets and to switch between a base language table and a related language table to view information in either single-byte or double-byte characters.

For example, users who enter data in Japanese require functionality that enables them to enter proper nouns, such as names or addresses, both in kanji and by using a phonetic double-byte character set, such as hiragana. The alternate character architecture also supports phonetic sorting rather than binary sorting on proper nouns for languages that require the use of two-character sets to enter proper nouns.

Alternate Character Fields

In an alternate character-enabled system, alternate character fields appear in company and person names and addresses.

Labels for alternate character fields differ depending on the component and the field. For example, the Alt Char Name appears in the Company component for entry of the company name in alternate character format. The rules that the system used to determine if alternate character fields appear on pages vary depending on the type of alternate character information that you enter:

- Company name.

In an alternate character-enabled system, the alternate character field for a company name always appears, whether or not it has a value. This does not depend on the country setting for the company.

- Person name.

The alternate character field appears on a page only if the country format is Japan or Hong Kong. You cannot view the alternate character field if one of these countries is not selected.

Pages that display personal name fields usually display them in first name, last name order. For Japanese and most Southeast Asian languages, however, personal name fields appear in the last name, first name order. A space, not a comma, separates the last and first names—the Name field displays the last name[space]first name, not last name,first name.

- Address (for both companies and persons).

The alternate character fields appear on the Update Address, the Address Book Entry Details and the Quick Create pages. They do not appear on the Address Book list page or on the summary address information that appears on the primary page for a business object.

See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, “Defining Name and Address Information for Business Objects”.

Note. The alternate character display is determined by the country code that is specified for the business object, not by the country code that is defined as a user preference for the user.

Alternate Character Searches

After you establish alternate character information, you can use the alternate character fields as search criteria in the Business Object search component or the Configurable search.

See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, “Working with Predefined Business Object Search and Quick Create Data”.

Configuring the System for Alternate Character Usage

This section discusses how to:

- Set up alternate characters for language codes.
- Enable alternate character functionality for a user.
- Enable business object search to recognize alternate character fields.

Pages Used to Configure the System for Alternate Character Usage

Page Name	Object Name	Navigation	Usage
Installation Options - Alt Character	ALT_CHAR_PNL	Set Up CRM, Install, Installation Options, Alt Character	Set up the alternate characters that the system uses for a specific language code.
User Preferences - Overall Preferences	OPR_DEF_TABLE_RB1	Set Up CRM, Security, User Preferences, Overall Preferences	Enable alternate character functionality for a user.
Field	RBQ_FLDDFN	Set Up CRM, Common Definitions, Customers, BO Search, Field, Field	Enable business object searches and quick creates to use alternate characters for a specific field.

Setting Up Alternate Characters for Language Codes

Access the Installation Options - Alt Character (alternate character) page.

Installation Options - Alt Character page

Language Code	Select a language code to which you can assign an alternate character value.
Alternate Character	Select the character set for the language code. Values are: <i>Alphanumeric</i> , <i>Alphanumeric with Latin-1 Ext</i> , <i>Any</i> , <i>DB Any Characters (Kanji)</i> , <i>Double Byte Hiragana</i> , <i>Double-Byte Katakana</i> , and <i>Single Byte Katakana</i> . The system uses the character set that is assigned to a user's language code to display alternate character-enabled fields to the user.

Enabling Alternate Character Functionality for a User

Access the User Preferences - Overall Preferences page.

See [Chapter 4, "Setting Up PeopleSoft Customer Relationship Management Security and User Preferences," Defining Overall Preferences , page 73.](#)

Enabling Business Object Search to Recognize Alternate Character Fields

Access the Field page.

Select Alternate Character Enabled.

See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, “Setting Up Business Object Search and Quick Create,” Adding and Modifying BO Search and Quick Create Definitions.

CHAPTER 9

Setting Up Auditing for Cases and Inbound Email

This chapter provides an overview of audit information and discusses how to set up case auditing.

Important! PeopleSoft delivers the system with auditing features disabled. Because enabling auditing can negatively impact application performance, you should analyze audit needs carefully and enable auditing only when there is a strong business reason to do so.

Understanding Audit Information

This section discusses:

- History versus auditing.
- The audit record.

History Versus Auditing

PeopleSoft Enterprise CRM tracks events that occur in the Case component and Inbound Email component using a feature called the active analytics framework. You can view a summary of these tracked events on component history pages. For each tracked event, a corresponding audit trail record stores details of changes and is used to display details of the changes.

Use the following pages to review history information in the Case component and in the Inbound Email component:

- Case History page

The Case History page lists information about major events in the life of the case, including a description of the event and details of field changes that are associated with the event. You can define case history events using complex conditional statements. For example, you can configure the case history so that changes to a field only appear if the field changes to or from a particular value.

You set up case history processing using the active analytic framework.

- Email History page

The Email History page lists email history events that are captured by the active analytic framework. You can use this page to review email event history, routing history, and audit trail information.

Both the Case History page and the Email History page offer access to a detailed audit trail page that displays record-level changes. You can specify the fields in the record to audit and the types of changes to capture (add, update, display, or delete). You cannot incorporate logic based on the value of the fields; the system captures changes without regard to the data that changes.

See Also

PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook

PeopleSoft Enterprise CRM 8.9 Multichannel Applications PeopleBook

PeopleSoft Application Designer

The Audit Record

The audit record stores audit trail data. The structure of this record determines the fields that get audited. The audit record for the Case component, RC_CASE_AUDIT, stores information from both support cases and help desk cases. The RB_INEM_AUDIT record stores information for the Inbound Email component.

The audit record consists of these elements:

1. Audit record key fields.

These fields hold information that is specific to the audit action.

2. The key fields for the records to audit.

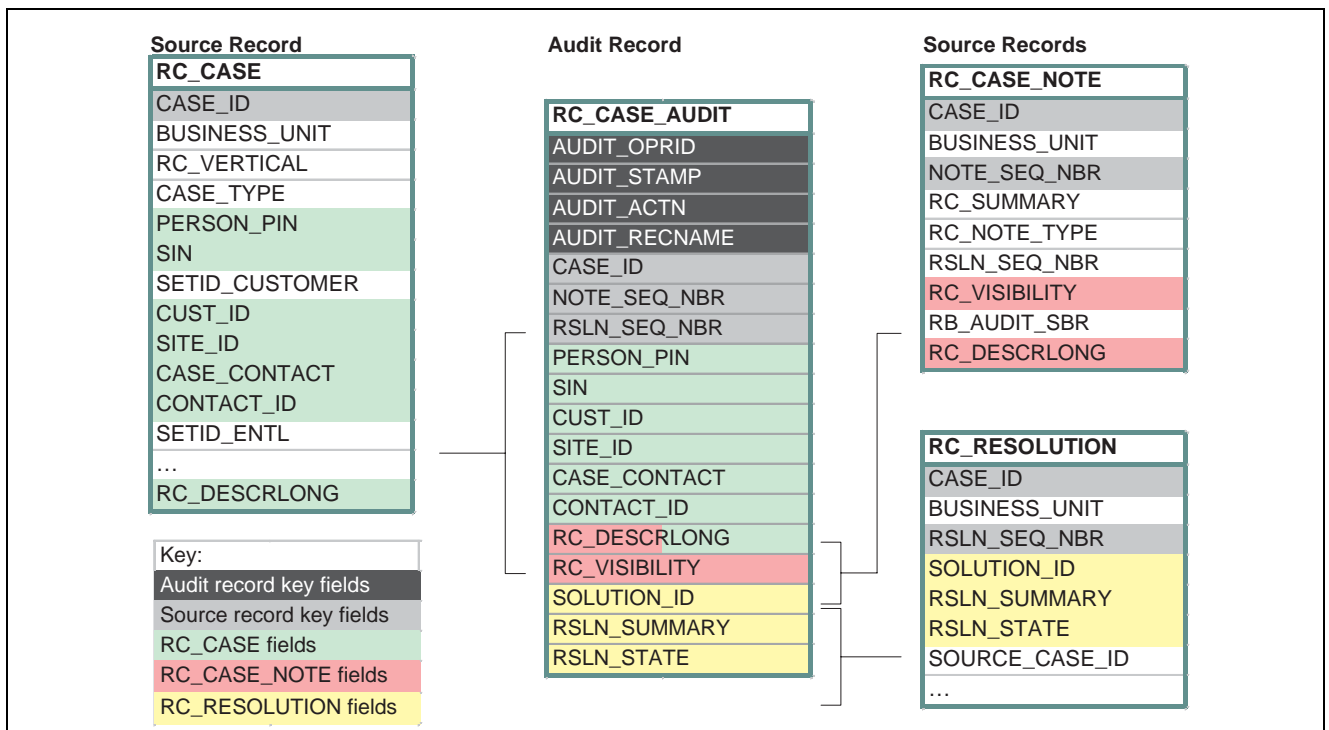
These are alternate key fields in the audit record.

Cases are based on several records; the audit record includes the key fields for every record that is audited. The BUSINESS_UNIT key field, however, is not on the audit record even though BUSINESS_UNIT is a key to the main case record, RC_CASE, and to each of its child records. This is because case numbers are unique across all business units, and the value in the CASE_ID field is enough to uniquely identify the case.

3. The fields to audit.

If a field appears in more than one record, changes to both records are audited. For example, the RC_DECSRLONG field appears in both RC_CASE and RC_CASE_NOTE. By including this field in the audit record, you ensure that changes to both the case description and the note description are audited.

This is the audit record architecture for RC_CASE_AUDIT:



Partial case audit record

The left and right columns list the records that are audited, or *source records*. The middle column lists the audit record.

Note. This diagram is an example only. Use PeopleSoft Application Designer to review the actual record structures for cases.

Before you turn on auditing, review the record structure so that you know which fields get audited.

To change the fields that get audited, use PeopleSoft Application Designer to modify the RC_CASE_AUDIT record definition or the RB_INEM_AUDIT record definition.

Important! PeopleSoft does not support modifications to the audit record definitions.

Setting Up Case Auditing

This section discusses how to set up case auditing.

Page Used to Set Up Case Auditing

Page Name	Object Name	Navigation	Usage
Audit - Setup	RC_COMP_AUDIT	Set Up CRM, Common Definitions, Audit Trail - Setup, Audit - Setup	Choose which actions (add, change, and delete) to audit.

Choosing Actions to Audit

Access the Audit - Setup page.

Audit - Setup

*Component Name:

RB_EM_IB

*Audit Record Name:

RB_INEM_AUDIT

Description:

Inbound Email

Record - Audit Options

Customize | Find |

First 1 of 1 Last

Record (Table) Name	Add	Change	Delete		
RB_IN_EMAIL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	+	-

☒ Show Field Label

Audit - Setup page

Note. PeopleSoft does not deliver entries for the inbound email component.

To define a new entry for this component, use the following values when setting up this page:

- Component name: *RB_EM_IB*.
- Audit record name: *RB_INEM_AUDIT*.
- Record (table) name: *RB_IN_EMAIL*.

Component Name	Enter the object name of the case component. PeopleSoft delivers entries for RC_CASE (the Case component). Although you configure auditing at the component level, the processing occurs at the record level. Therefore, when multiple components are based on the same record, the system captures data changes regardless of which component the user was in when making the change. For example, the auditing that you establish for the RC_CASE component is also valid for the self-service case components, which are based on the same records.
Audit Record Name	Enter the record where the system stores information about data changes. The structure of this record determines which fields get audited.
Record (Table) Name	Enter the record that is associated with the audited component. The Case component includes data from several records.

Record - Audit Options

The fields in the Record - Audit Options region enable you to select which actions (add, change, and delete) to capture for each record that you audit. The selections apply to all audited fields in the specified record. You cannot set any field-level auditing options; all fields in a record must use the same auditing rules. To set field-level auditing options, you must redefine the audit record using PeopleSoft Application Designer.

When you activate auditing on the Audit Setup page, you turn on auditing only for the fields that are included in the audit record (RC_CASE_AUDIT or RB_INEM_AUDIT)—the record that stores the audit trail data.

All auditing is based on differences between the field values at the time that the component is opened and at the time that the component is saved. If a user saves several times while working in a component, each save triggers auditing activity.

Add

Select to have the system capture the change every time a value is added to a field that is audited. A value is considered as added in two situations:

- When data is in the field the first time that you save a new row of data.
For example, if you create a new case, the values in all populated fields are considered as added the first that time that you save that case.
- When you save data in a field that was previously null.

Change

Select to have the system capture the change every time the value of an audited field is updated. A value is considered updated when a new non-null value is different from the previous non-null value.

Delete

Select to have the system capture the change every time the value of an audited field is deleted. A value is considered deleted when a null value replaces a non-null value.

Show Field Label

Select to have the Audit Trail page display the field labels rather than the field's object name. For example, if you're auditing the RC_PRIORITY field, selecting this option causes the Audit Trail page to refer to this field as *Priority* rather than *RC_PRIORITY*.

If this check box is clear, the Audit Trail page displays field values. If the audited field has translate values, the translate long value appears.

CHAPTER 10

Running Diagnostic Reports

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

- Register diagnostic packages.
- Run diagnostic reports

Understanding PeopleSoft Enterprise CRM Diagnostics

CRM diagnostics consist of seven PeopleSoft application packages, or plug-ins, that can help to troubleshoot the PeopleSoft Enterprise CRM system setup or integration related problems. When you report a problem to the PeopleSoft Global Services Center, the support representative might ask you to run a diagnostic package to determine how the system is set up.

The delivered diagnostic packages are sufficient to diagnose most system problems. To develop additional diagnostic packages that meet installation-specific needs, use the PeopleTools Application Designer.

See *Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Application Designer*

PeopleSoft Enterprise CRM diagnostic packages produce reports that appear at the workstation or are emailed to you. You can run the following seven diagnostic packages:

Package Name	Purpose
DIAG_CMSETUP	Displays information about correspondence management installation and setup: <ul style="list-style-type: none">• Merge Server Definition• Merge Server Printers• Setup Merge Server• Install Options• FTP URL Details for Correspondence Management• Process Scheduler Server Names for Correspondence Management Jobs• Process Scheduler Server Details

Package Name	Purpose
DIAG_COMMSETUP	Displays information about communications setup: <ul style="list-style-type: none"> • Configuration table. • Churn event setup. • Churn event set setup. • Churn score setup.
DIAG_EIPGATEWAYINFO	Queries the connection URL and displays information about multiple gateways, if multiple gateways are set up.
DIAG_EIPMESSAGENODES	Displays information about node definition: <ul style="list-style-type: none"> • Message node name. • Transaction type (InSync, OutSync, InAsync, and OutAsync). • Request message. • Request message version. • Status (active, inactive).
DIAG_EIPMESSAGES	Displays information about EIP messages that is sorted by the different application names: <ul style="list-style-type: none"> • Message node name. • Transaction type (InSync, OutSync, InAsync, and OutAsync). • Request message. • Request message version. • Status (active, inactive).
DIAG_FSISSETUP	Displays the following: <ul style="list-style-type: none"> • Operator, business unit, and setID. • Role code and role name. • Role mapping. • FSI issues setup.
DIAG_SEARCHBUILDSETUP	Displays the following: <ul style="list-style-type: none"> • Information about the last search build. • Run control information. • Search parameters for CRM_RB_SRCHDB. • Search records. • Search records and fields.

Note. Before you can run any of these diagnostic packages, you must register them.

See [Chapter 10, “Running Diagnostic Reports,” Registering Diagnostic Packages, page 145](#).

Registering PeopleSoft Enterprise CRM Diagnostics

This section discusses how to run PeopleSoft Enterprise CRM diagnostics.

Page Used to Register PeopleSoft Enterprise CRM Diagnostics

Page Name	Object Name	Navigation	Usage
Register Diagnostics	PT_DIAG_FRAME_REG	Application Diagnostics, Register Diagnostics	Register diagnostic packages to run in the PeopleSoft Enterprise CRM system.

Registering Diagnostic Packages

Access the Register Diagnostics page.



The screenshot shows the 'Register Diagnostics' page. It features a section titled 'Registered Plug-ins' with a table. Above the table are links for 'Customize', 'Find', 'View All', and a grid icon. To the right of these links are 'First', '1 of 1', and 'Last' navigation controls. The table has two columns: '*Plug-in Name' and 'Description'. The first row shows '1' in the first column, 'DIAG_CMSETUP' in the second column, and 'Correspondence Management' in the third column. There are search and add/remove buttons at the bottom right of the table.

Register Diagnostics page



Click the Look Up Plug In Name button and search for a package name that begins with DIAG.

See Also

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

Running PeopleSoft Enterprise CRM Diagnostic Packages.

This section describes how to run PeopleSoft Enterprise CRM diagnostic packages.

Pages Used to Run PeopleSoft Enterprise CRM Diagnostic Packages

Page Name	Object Name	Navigation	Usage
Application Diagnostics	PT_DIAG_PLUGIN	Application Diagnostics, Launch Diagnostics	Select and run diagnostic packages.
PeopleSoft Diagnostics	PT_DIAG_PLUGIN	Access the Launch Diagnostics page Select one or more listed plug-ins. Click the Display report in browser link. Click the Generate Diagnostics button.	View the diagnostics for the selected plug-ins.

Selecting and Running Diagnostic Packages

Access the Launch Diagnostics page.

Launch Diagnostics

Registered Plug-ins [Customize](#) | [Find](#) | First 1 of 1 Last

	Select	Plug-in Name	Description
1	<input checked="" type="checkbox"/>	DIAG_CMSETUP	Correspondence Management

[Select All](#) [Clear All](#)

☐ Email report ☒ Display report in browser

[Generate Diagnostics](#)

Launch Diagnostics page

Select one or more diagnostic packages to run and click the Generate Diagnostics button.

Email report Select to have the report emailed to you

Display report in browser Select to have the report appear in a separate popup window.

Viewing Diagnostics

Access the PeopleSoft Diagnostics page.

PeopleSoft Diagnostics

Database Name: **C1B89000**
 User ID: **VP1**
 Date Created: **2004-05-28-12.18.41.000000**
 Database Type: **MICROSFT**

Plug-in Name: DIAG_CMSETUP

Description: Correspondence Management

Purpose: Correspondence Management Diagnostics

The following values were retrieved:

```
****Merger Server Definition**** ****PS_RBC_SERVER****
SERVERNAME MERGE_NT
STATUS_SETUP C
RBC_CMDLINE cscript.exe //B //T:3600 c:\Peoplesoft_Merge\Bin\PSFT_WORD_ENGINE.WSF
FOLDER_BIN c:\Peoplesoft_Merge\Bin
FOLDER_TEMP c:\temp
FOLDER_TRANS c:\Peoplesoft_Merge\Transaction
FOLDER_CACHE c:\Peoplesoft_Merge\Cache
TEMPLATE_CACHE_FLG Y
LANGUAGE_CD ENG
****Merger Server Printer**** ****PS_RBC_SRVR_PRINT****
****Setup Merger Server**** ****PS_RBC_SETUPFILE****
```

PeopleSoft Diagnostics page

PART 3

Workforce Management

Chapter 11

Setting Up and Maintaining Provider Groups and Group Members

Chapter 12

Managing Workforce Competencies

Chapter 13

Setting Up and Performing Assignment Searches

Chapter 14

Defining Holiday Schedules

Chapter 15

Using Calendars

CHAPTER 11

Setting Up and Maintaining Provider Groups and Group Members

This chapter provides an overview of provider groups and group members and discusses how to:

- Establish cost categories for workers.
- Define provider groups.
- Define schedules for provider groups.
- Define group assignment criteria and competencies.

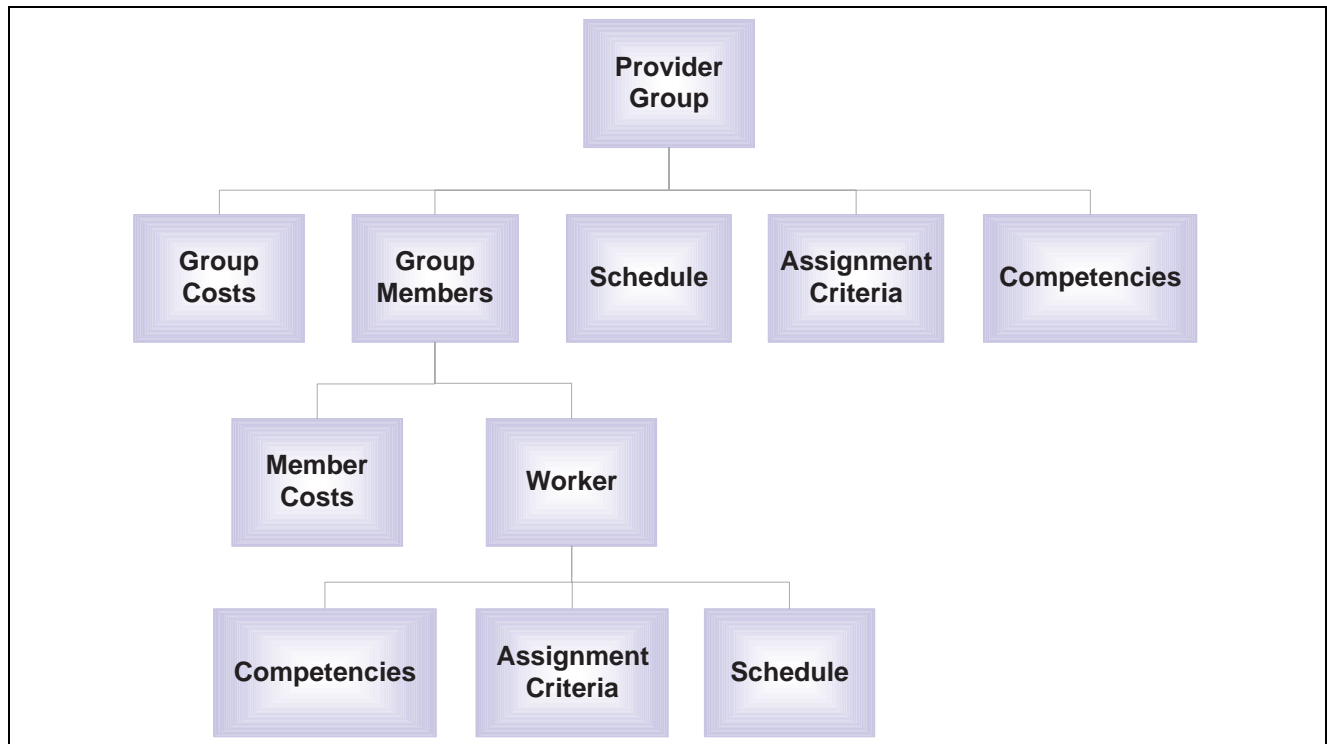
Understanding Provider Groups and Group Members

Provider groups organize groups of workers that provide the services or support that is offered by your organization. Cases and service orders are assigned first to a provider group and then to a member of a provider group. For cases you can assign cases directly to provider groups members (agents) rather than going through a provider group assignment.

You can create provider groups that represent workers who service or support specific geographic regions, specific products, or specific customers. Provider groups might also represent workers who have specific competencies. Each worker that can be assigned to a service order must be a member of at least one active provider group.

Provider Group Data Model

As the following diagram illustrates, a provider group definition includes group cost information, group members, an operating schedule, assignment criteria, and competency information:



Provider group and group member data model

Each group member can represent employees or third-party contractors. You can also define cost information for each worker in the group. Workers are defined using the Worker component.

Default Assignments for Service Orders

Default assignments for provider groups and group members can be automatically populated for service orders based on the related agreement or service. The defaults for an agreement take precedence over the defaults for a service. For on-demand service orders, the default provider group and group member information come from the service definition.

System-Suggested Assignments for Cases and Service Orders

For both provider groups and workers, you can define competencies and assignment criteria for provider group and group member assignment searches that are performed on a case or service order. The system uses the competency and assignment criteria to evaluate the best candidate for assignment to the case or service order.

To further inform assignment decisions, the system displays current availability status of each provider group or group member on the candidate list. To determine availability for a provider group, the system uses the schedule information—the hours of operations and holidays—that you define for the provider group.

For group members, the system determines availability by using schedule information that is defined on the worker's resource calendar, if it's available, or standard workweek information that is defined for the installation. In addition to availability status, the system also displays the current number of open cases that are assigned to each worker in the list when the assignment search is performed for a case.

Automatic Assignments for Cases

PeopleSoft Customer Relationship Management (PeopleSoft CRM) performs automatic assignment for regular and self-service cases based on the configuration rules that are set up at the call center business unit level. For each type of case (regular and self-service), you can configure separate assignment options for provider groups and group members (agents).

Regardless of the configuration, an existing provider group or group member assignment is never overwritten. For example, if you select a provider group for the case through the system-suggested assignment, the system does not attempt to assign a provider group when you save.

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

Automatic Assignments for Service Orders

Similar to cases, you can enable PeopleSoft CRM to assign service orders automatically at save time by activating the automatic assignment feature at the field service business unit level.

The automatic assignment feature, however, does not overwrite any provider group or group member values that are present on service orders as a result of manual, default, or system-suggested assignment.

If the Candidate must be available check box is selected at the business unit level, the assignment engine only considers provider groups and group members that are available (during the time the service is performed) for the automatic assignment. No automatic assignment will be made if this check box is selected and there is no provider group or technician available.

See *PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook*, “Creating and Managing Service Orders,” Setting Up Automatic Service Order Assignments.

See Also

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, “Defining Workers”

[Chapter 13, “Setting Up and Performing Assignment Searches,” page 173](#)

[Chapter 23, “Setting Up and Managing Agreements and Warranties,” page 337](#)

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

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

Establishing Cost Categories for Workers

This section discusses how to define cost categories for workers.

Page Used to Define Cost Categories

Page Name	Object Name	Navigation	Usage
Cost Categories	RF_COST_CAT	Set Up CRM, Common Definitions, Employee Data, Cost Categories, Cost Categories	Define cost categories to account for the cost of labor time to your company.

Defining Cost Categories

Access the Cost Categories page.

Cost Categories

SetID CRM01

Cost Categories

Customize | Find | View All |

First 1-6 of 6 Last

*Cost Category Code	*Description	Short Description			
AFTR	After Hours	After Hour	VAT Defaults	Service VAT Treatment Defaults	
DOUB	Double Time	Double	VAT Defaults	Service VAT Treatment Defaults	
HALF	Time and Half	1.5	VAT Defaults	Service VAT Treatment Defaults	
PAGER	Pager	Pager	VAT Defaults	Service VAT Treatment Defaults	
STRT	Straight Time	Straight	VAT Defaults	Service VAT Treatment Defaults	
TRAVL	Travel	Travel	VAT Defaults	Service VAT Treatment Defaults	

Add Cost Category

Save

Return to Search

Refresh

Add

Update/Display

Cost Categories page

Once you define cost categories, establish an hourly cost rate for each category that provider groups use on the Provider Groups page. Specify cost categories and rates for group members on the Provider Group Member page.

Cost Category Code

Enter cost categories to account for the labor costs that the organization incurs; that is, the cost to provide a worker to perform a service for your customers.

Vat Defaults

Click to go to the VAT Defaults Setup page in the PeopleSoft Financials/SCM (FSCM) database.

Use the page to specify a value for all the required fields, for any fields requiring an overall default at the top of the VAT default hierarchy, or for any fields requiring an exception to the value specified for a VAT driver higher up in the VAT default hierarchy. You can insert rows for any or all of the VAT driver keys, as well as the VAT country or state. You can also delete existing rows

Service VAT Treatment Defaults

Click to access the Service VAT Treatment Defaults Setup page in the PeopleSoft Financials/SCM (FSCM) database. Use this page to enter VAT Defaulting information for service VAT treatment.

Note. VAT is an acronym for value-added tax. Under many different names VAT is in use in over 130 countries around the world. VAT is a governmental sales tax, a straight percentage that is added to the cost of a good or service. VAT can be inclusive, in which case VAT is included in the price of a good or service, or exclusive, in which case VAT needs to be added to the price of a good or service.

See Also

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

Defining Provider Groups

To define provider groups, use the Provider Group (PF_PROVIDER_GRP) and Provider Group Member (RF_GRP_MEMBER) components. To load data into these tables for these components, you can also use the RF_PROVIDER_GRP_SCI and RF_GRP_MEMBER_CI component interfaces.

This section lists prerequisites and common elements, and discusses how to:

- Define provider groups.
- Define provider group members.

Prerequisites

Before you define provider groups, you must:

- Define workers by using the Worker component.
- (Optional) Define cost categories.

See Also

Chapter 11, “Setting Up and Maintaining Provider Groups and Group Members,” [Establishing Cost Categories for Workers, page 153](#)

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, “Defining Workers”

Common Elements Used in This Section

Hourly Rate and Currency Code	Enter the cost to your company for one hour of labor time that is charged to this cost category, and the currency that you use for the cost.
Multiplier	Enter a numeric value to generate an hourly billing rate that is based on the hourly rate.
Billable Rate	Displays the value that is calculated at save time or the next server trip that reflects the hourly billing rate, which is based on the following formula: (Billable Rate) = (Hourly Rate) – (Multiplier)

Pages Used to Define Provider Groups

Page Name	Object Name	Navigation	Usage
Provider Groups	RF_PROVIDER_GRP	Workforce, Provider Groups, Provider Groups	Define and maintain the groups of people who perform service or support activities.
Provider Group Member	RF_GRP_MEMBER	<ul style="list-style-type: none"> • Workforce, Provider Group Members, Provider Group Member • Click the Details button on the Provider Groups page. 	Define the people who are associated with a provider group.

Defining Provider Groups

Access the Provider Groups page.

Provider Groups | [Schedule](#) | [Assign Group Criteria](#) | [Group Competencies](#)

SetID CRM01 **Provider Group ID** APLE

Basic Information

***Provider Group** Appliances Eastern

***Status** Active **Type**

☒ Internal ☐ Partner/TPM ☐ Both

Company Name

***Notifications** ☒ Use Members to Broadcast
☒ Group Worklist

Group Worklist Name Appliances_Eastern

Preferred Notification Both

Email Address crmq@yahoo.com

Comments Pine,Teresa P, Orellana,Mason D and Perry David, L belong to the Appliances_Eastern Group Worklist

Currency Code

Provider Groups page (1 of 2)

Group Cost Categories [Customize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

*Cost Category	*Hourly Rate	*Currency Code	*Multiplier	Billable Rate	
STRT	75.00	USD	1.00	75.00	

[Add Cost Category](#)

Group Members [Customize](#) | [Find](#) | [View All](#) | First 1-10 of 10 Last

Name	*Status	
Alan Bailey	Active	
Amed Carver	Active	
Ben Harris	Active	
Kendall Symth	Active	
Melinda Rose	Active	
Rider Bookie	Active	
Shanna Ethbridge	Active	
Shirley Gardner	Active	
Teresa Pine	Active	
Tyson Bruno	Active	

[Add Group Member](#)

[Audit History](#)

Provider Groups page (2 of 2)

Basic Information

Status	<p>Select the current status of the provider group: <i>Active</i> or <i>Inactive</i>.</p> <p>The system excludes all inactive provider groups from system prompt lists; therefore, you can't assign them to service orders and cases. Also, you can't change the status of a provider group to <i>Inactive</i> if any of its group members is currently assigned to an open service order or case.</p> <hr/> <p>Note. When you change the status of a provider group to <i>Inactive</i>, the status of all its members changes to inactive automatically and can't be modified unless you set the provider group status to <i>Active</i> again. To activate group members, you must manually change the status of each group member to <i>Active</i>.</p> <p>If you change the status of a group member to <i>Inactive</i> by using the Worker component, the group member automatically becomes inactive in the associated provider group.</p> <hr/>
Type	For informational purposes, the Type defines whether members of the provider group are internal employees, partner or third-party maintainer (TPM) employees, or both.
Company Name	Select the company that is associated with the provider group. When a provider group represents staff from a third-party contractor, use this field to define a name for the third-party company. Click the Transfer to Company button to access the Company component and define an additional company.
Notifications	The system uses the notification routing preferences that are associated with the group member's user ID to publish workflow notifications about service order assignment changes that affect the group member. Routing preferences are defined for the group member's user profile on the Workflow page of the User Profiles component under PeopleTools, Security.
Use Members to Broadcast	Select to send all automated notifications (that are sent to the group) to each member's individual worklist instead of to the group worklist. The system never broadcasts manual notifications, regardless of whether this check box is selected.
Group Worklist and Group Worklist Name	Select the check box and the name of the group worklist that is associated with the provider group. Worklists are established on the Group Worklist page. As group membership changes, update permissions for the group worklist as necessary.
Preferred Notification	Select the preferred way of receiving notification: <i>Email</i> , <i>Worklist</i> , or <i>Both</i> .
Email Address	Enter the email address that is used to send notifications to the provider group.
Currency Code	Select the currency that is used to determine labor costs for the work that provider group members perform. The selected currency becomes the default for new rows in the Group Cost Categories grid. Currency codes are established on the Currency Code page.

Group Cost Categories

The Group Cost Categories grid reflects the costs per hour and corresponding billable rates for the members of the provider group.

Cost Category	Select the code of the cost category that is used to account for the labor time of members in the provider group. Cost category codes are defined on the Cost Categories page.
Hourly Rate, Currency Code, Multiplier, and Billable rate	Use these field to establish the rate, currency, and multiplier by which you want to bill a customer for the selected cost category for the group of members. When you save the page, the system multiplies the hourly rate by the value in the Multiplier field to calculate the billable rate.

See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, “Defining Workers,” Setting Up Cost Categories.

Group Members



Click the Details button to access the Provider Group Member page, where you can view or modify the group member record.

Name Displays the name (first name followed by last name) of the group member. Before you can add a new person to the group, the person must be defined using the pages in the Worker component. Click the Transfer to Worker button that is next to this field to access the Worker component.

Note. You can also define members of the provider group on the Provider Group Member page.

Status Select the person’s current status as a member of this provider group: *Active* or *Inactive*.

The system excludes all inactive group members from system prompt lists, so you can’t assign them to service orders and cases. You cannot change the status of a group member to *Inactive* if an open service order is assigned to the group member. Similarly, you cannot delete a group member if an open service order is assigned to him or her.

See Also

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, “Defining Workers”

Chapter 5, “Working with Notes and Attachments,” page 111


Defining Provider Group Members

Access the Provider Group Member page.


Provider Group Member


Provider Group


SetID CRM01


Provider Group APLE  Appliances Eastern **Status** Active




Member Information




Name Kendall Symth **Person ID** 592 

***Status** Active  **Location** KUNY00 Corporation Headquarters




Currency Code USD  **Description** US Dollar



Comments 

Member Cost Categories [Customize](#) | [Find](#) | [View All](#) |  First  1 of 1  Last

*Cost Category	*Hourly Rate	*Currency Code	*Multiplier	Billable Rate	
STRT 	75.00	USD 	1.20	90.00	

[Add Cost Category](#)

Assigned Service Orders [Customize](#) | [Find](#) |  First  1-2 of 2  Last

Unit	Service Order ID	Status	Priority	Line	Activity	Act Status	Act Priority	Start Date	Start Time	End Date	End Time
US200	0000000050 	Open	Urgent	1		Assigned	Urgent	06/20/2001	10:00AM	06/20/2001	12:00PM
US200	0000000057 	Open	Urgent	1		Assigned	Urgent	07/02/2001	4:00PM	07/02/2001	5:00PM

Provider Group Member page

To view details about the selected provider group, click the Transfer to Provider Group button that is next to the provider group ID to access the Provider Group page.

Member Information

Name Displays the name of the group member that you enter when adding the record.

Note. You can also define members of the provider group on the Provider Group page.

Currency Code Select the currency that you use to determine the labor costs for the work that the group member provides. The selected currency becomes the default for new rows in the Member Cost Categories group box. Currency codes are established on the Currency Code page.

Member Cost Categories

The Member Cost Categories group box reflects the costs per hour and corresponding billable rates for the member.

Cost Category Select the code of the cost category that you use to account for the labor time of the group member. Define cost category codes on the Cost Categories page.

Hourly Rate, Currency Code, Multiplier, and Billable rate Use these field to establish the rate, currency, and multiplier by which you want to bill a customer for the selected cost category for the member. When you save the page, the system multiplies the hourly rate by the value in the Multiplier field to calculate the billable rate.

Assigned Service Orders

You can view service order assignments for the group member.

Unit Displays the PeopleSoft Integrated FieldService business unit where the service order originated.

Service Order Displays the number of the service order that is assigned to the group member. Click the Transfer to Service Order button to access that service order.

See Also

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

Enterprise PeopleTools 8.45 PeopleBook: Security Administration

Defining Schedules for Provider Groups

Schedule information determines when the provider group is available for assignment.

Page Used to Define Schedules for Provider Groups

Page Name	Object Name	Navigation	Usage
Schedule	RF_PROVGRP_TIME	Workforce, Provider Groups, Schedule	Define the hours of operation for a specific provider group.

Defining Schedules

Access the Schedule page.

Provider Groups | **Schedule** | Assign Group Criteria | Group Competencies

SetID CRM01 Provider Group ID APLE

Schedule

Time Zone Pacific Time (US), Tijuana

Holiday Schedule

Hours of Operation

☒ **Monday** ☒ **Tuesday** ☒ **Wednesday** ☒ **Thursday**

Start	End		
8:00AM	5:00PM	+	-

☒ **Friday** ☐ **Saturday** ☐ **Sunday**

Start	End		
8:00AM	5:00PM	+	-

▶ **Audit History**

Schedule page

To define hours of operation for a provider group:

1. Specify the appropriate time zone.

The time periods that you define in Hours of Operation group box appear in the time zone that you select.

2. Specify the appropriate holiday schedule, if applicable.

If the date that an assignment search is performed corresponds to a holiday for a provider group, the system indicates that the provider group is unavailable for assignment. Define holiday schedules by using the Holiday Schedule page under Set Up CRM, Common Definitions, Calendars and Schedules.

Note. You can update workers' calendars with specified holiday schedules by running the Load Holiday process (RF_HOLIDAY).

3. Select the days of the week that the provider group is open for business transactions.

If the date that an assignment search is performed corresponds to a day that a provider group is not open for business transactions, the system indicates that the provider group is unavailable for assignment.

4. For each day of the week, specify the hours of operation.

Enter start and end times for each work period in the day. You can enter multiple work periods to represent lunch breaks, shifts, and so forth. Establish default values for this page on the Installation - Calendar Options page under Set Up CRM, Install, Installation Options.

See Also

[Chapter 13, "Setting Up and Performing Assignment Searches," page 173](#)

[Chapter 14, "Defining Holiday Schedules," Associating Workers with Holiday Schedules, page 201](#)

[Chapter 14, "Defining Holiday Schedules," Updating Workers' Calendars with Specified Holiday Schedules, page 201](#)

Defining Group Assignment Criteria and Competencies

This section discusses how to:

- Define assignment criteria.
- Associate competencies with provider groups.

Pages Used to Define Group Assignment Criteria and Competencies

Page Name	Object Name	Navigation	Usage
Assign Group Criteria	RF_PRV_GRP_CRIT	Workforce, Provider Groups, Assign Group Criteria	Define the criteria that you use to match a provider group to a case or service order.
Group Competencies	RF_PRVGRP_COMP	Workforce, Provider Groups, Group Competencies	Associate a provider group with a list of competencies and define the provider group's level of proficiency for each competency.

Defining Assignment Criteria

Access the Assign Group Criteria page.

Provider Groups		Schedule		Assign Group Criteria		Group Competencies	
SetID CRM01				Provider Group ID APLE			
Region				Customize Find			
*Region Description							
Eastern						+ -	
Customer				Customize Find			
*SetID		*Customer		Site			
CRM01		MMA Property Management Group					
						+ -	
Product				Customize Find			
*SetID		*Product Description		*Proficiency			
CRM01	26.7 cu. Ft. Refrigerator w/Fc		4-Very Good		+ -		
CRM01	21.6 cu. Ft. Top Refrigerator		4-Very Good		+ -		
CRM01	24.7 cu. Ft. Refrigerator w/Fc		4-Very Good		+ -		
CRM01	19.6 cu. Ft. Top Refrigerator		4-Very Good		+ -		
CRM01	14.8 cu. Ft. Chest Freezer Fla		5-Expert		+ -		
CRM01	7.2 cu. Ft. Chest Freezer Flas		5-Expert		+ -		
CRM01	22.8 cu. Ft. Chest Freezer Man		5-Expert		+ -		
CRM01	17.8 cu. Ft. Chest Freezer Man		5-Expert		+ -		

Assign Group Criteria page (1 of 2)

Product Group		Customize Find	
*SetID	*Product Group		
CRM01	REFRIDGE	+ -	
CRM01	FREEZER	+ -	
Location		Customize Find	
*SetID	*Location		
CRM01	California Location	+ -	
Department		Customize Find	
*SetID	*Department		
CRM01	Service	+ -	
Role		Customize Find	
*Role Description			
Call Center Agent		+ -	
▶ Audit History			

Assign Group Criteria page (1 of 2)

When an assignment search is performed from a case or service order, the assignment engine calculates a point value for each criteria value on the service order or case that the provider group matches, based on the weight, or relative importance of the match. The sum of the point values becomes the provider group's fit score. Failure to match a criterion does not exclude the provider group from the list of suggested assignment candidates, but it lowers the provider group's total fit score.

For help desk cases, the assignment engine matches values for department, location, product, and product group. For service orders and support cases, the assignment engine matches values for customer, site, region, product, and product group.

Enter each region, customer, product, product group, location, department, and role that the provider group supports.

Region

Region information can be derived from information that is on the service order or case. At least one region is required.

Customer

If the provider group can support a customer at any site, enter the customer and leave the Site field blank. You can also select a site without specifying a customer.

Product

Enter the setID and the name of the product and the group's proficiency level for supporting the product. Available values for the Proficiency field depend on the product rating model that you specify for the setID on the Assignment Setup page of the Assignment Engine Setup component under Set Up CRM, Common Definitions, Codes and Auto Numbering, Assignment Weighting Factors.

Product Group

Enter the product group that is the provider group supports.

Location

Enter the location that the provider group supports.

Department

Enter the department that the provider group supports.

Role

Enter the role that the provider group supports.

Note. Change management is the only product that uses role criteria for assignments.

See Also

Chapter 13, "Setting Up and Performing Assignment Searches," page 173

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

Associating Competencies with Provider Groups

Access the Group Competencies page.

Provider Groups | Schedule | Assign Group Criteria | **Group Competencies**

SetID CRM01 Provider Group ID APLE

Assigned Competencies Customize | Find | First 1-3 of 3 Last

*Description	*Proficiency	
Appliances Service & Repair	5-Expert	
Ability to manage own time	4-Very Good	
Articulate & concise	3-Good	

Add Competency

▶ Audit History

Group Competencies page

PeopleSoft Integrated FieldService can evaluate which provider group is best qualified for assignment to a service order by comparing provider group competency and proficiency with the competency and proficiency that is required for a service or service activity on a service order.

Similarly, in PeopleSoft Support and PeopleSoft HelpDesk, the system can evaluate which provider group is qualified for assignment to a case by matching the competency and proficiency that you specify on the case in the Problem Type field with the competency that is defined for the provider group.

Assigned Competencies

Description

Select a competency. Establish competencies on the Competencies page of the Competencies component under Set Up CRM, Common Definitions, Competencies.

Proficiency

Select the provider group's level of expertise for the competency. The rating model that you define for the competency on the Competencies page determines the available proficiency values. In PeopleSoft Integrated FieldService, the system checks a provider group's proficiency level to determine whether the provider group is qualified to perform work on a service order that requires the competency.

See Also

[Chapter 13, "Setting Up and Performing Assignment Searches," page 173](#)

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, "Defining Workers"

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

CHAPTER 12

Managing Workforce Competencies

This chapter provides an overview of competencies in PeopleSoft Customer Relationship Management (PeopleSoft CRM) and discusses how to set up competency information.

Understanding Competencies in PeopleSoft CRM

In PeopleSoft CRM, competencies define the skills of the workforce. You can associate a set of competencies with provider groups and workers and define the competency proficiency level for each provider group and worker.

In PeopleSoft Integrated FieldService, define competency requirements for the services that the company provides, and the minimum level of competency proficiency that is required to perform a service or service activity.

Similarly, in PeopleSoft call center applications, you set up minimum competency proficiency requirements for the problem type, category, type or detail information that are used for case assignment. By comparing the competency requirements with the competencies that you define for your workforce, the system can generate a list of qualified candidates to assign to a case.

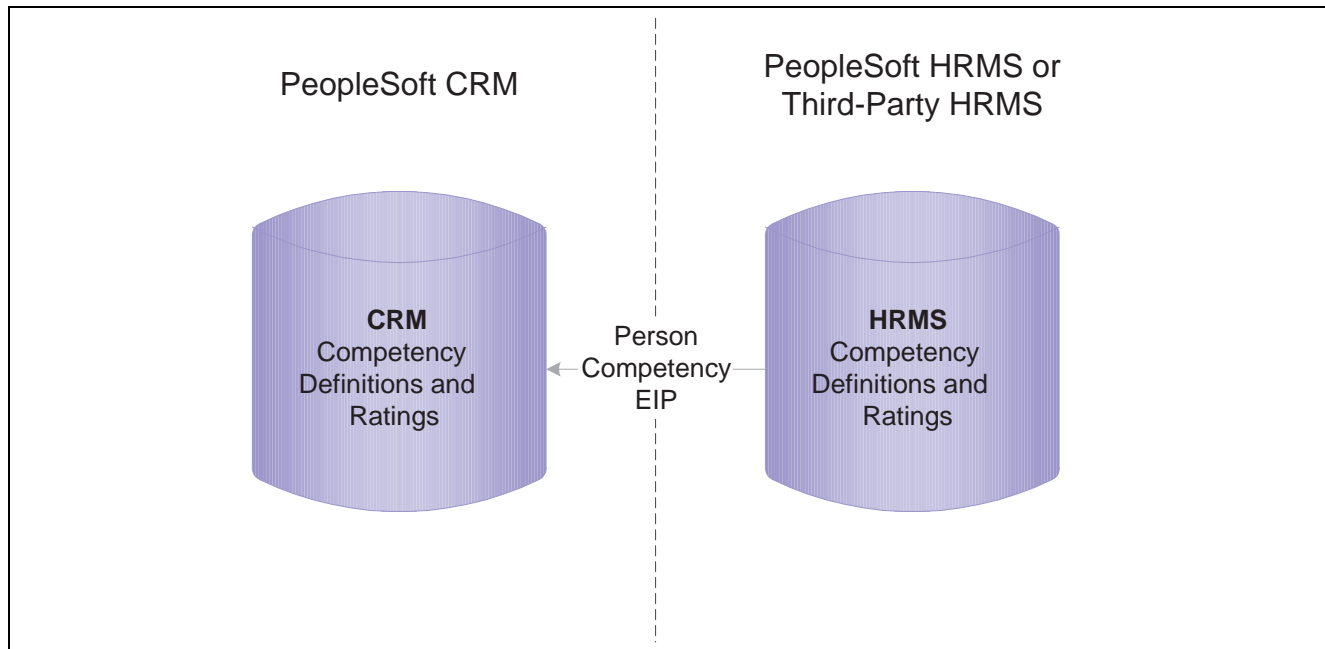
You can enter competencies and competency proficiency ratings by using components within PeopleSoft CRM or the Person Competency enterprise integration point (EIP). The EIP synchronizes system tables with competency information that you define in PeopleSoft Human Resources Management (PeopleSoft HRMS) or a third-party human resource management system.

The Person Competency EIP includes two application messages: `PERSON_COMPETENCY_FULLSYNC` and `PERSON_COMPETENCY_SYNC`. At initial implementation, the human resources management system publishes a full set of competency records to PeopleSoft CRM by using the `PERSON_COMPETENCY_FULLSYNC` application message.

When a user adds or modifies competency definitions in the human resources management system after the initial full synchronization, each change is published to PeopleSoft CRM by using the `PERSON_COMPETENCY_SYNC` application message.

PeopleSoft CRM is a subscriber to Person Competency EIP messages, not a publisher. Any changes that you make to competency definitions or ratings in PeopleSoft CRM are not published or synchronized with the human resources management system.

Make all updates to competency records in your human resources management system and publish them to PeopleSoft CRM, as the following diagram illustrates:



Flow of competency information from the human resources management system to PeopleSoft CRM

See Also

Chapter 13, “Setting Up and Performing Assignment Searches,” page 173

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

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

Chapter 3, “Setting Up General Options,” Setting Up PeopleSoft Enterprise CRM Application Installation Options, page 22

PeopleSoft Enterprise Components for CRM 8.9 PeopleBook

PeopleSoft 8.8 Application Fundamentals for HRMS PeopleBook

Setting Up Competency Information in PeopleSoft CRM

To define competency information, use the Review Rating (CM_REVW_RATING_TBL), Competency Type (CM_TYPE_TABLE), and Competency (COMPETENCY_TBL) components.

If you do not synchronize competency information with another system by using the Person Competency EIP, you can manually define competency rating models, competencies, and the competency proficiency for workers by using components in PeopleSoft CRM.

This section discusses how to:

- Define competency rating models.
- (Optional) Define competency types.
- Define competencies.
- Define competency proficiency levels.

- Define minimum competency requirements for service orders and cases.

Pages Used to Set Up Competency Information in PeopleSoft CRM

Page Name	Object Name	Navigation	Usage
Competency Rating Model	CM_REVW_RATING_TBL	Set Up CRM, Common Definitions, Competencies, Competency Rating Model, Competency Rating Model	Define codes that you want to use to indicate a provider group or worker's level of proficiency for a competency that is required to perform a service or support a product.
Competency Types	CM_TYPE_TABLE,	Set Up CRM, Common Definitions, Competencies, Competency Types, Competency Types	Define competency types, broad categories of competencies that are relevant to particular positions or projects. When you define a competency, it can be associated with one or more types.
Competencies	COMPETENCY_TABLE	Set Up CRM, Common Definitions, Competencies, Competencies, Competencies	Establish IDs for competencies and then tie the ID to the rating model and competency types.

Defining Competency Rating Models

Access the Competency Rating Model page.

Competency Rating Model

Rating Model PSCM

Description Find | View All First 1 of 1 Last

***Effective Date** 01/01/1980 **Status** Active

***Description** Competency Management Scale **Short Description** Comp Mgmt

*Rating	*Description	Short Description	Rating Points		
0	0-None	None	0	+	-
1	1-Little	Little	1	+	-
2	2-Fair	Fair	2	+	-
3	3-Good	Good	3	+	-
4	4-Very Good	Very Good	4	+	-
5	5-Expert	Expert	5	+	-

Competency Rating Model page

A rating model specifies how you measure a provider group or worker’s proficiency for a particular competency.

Rating Levels

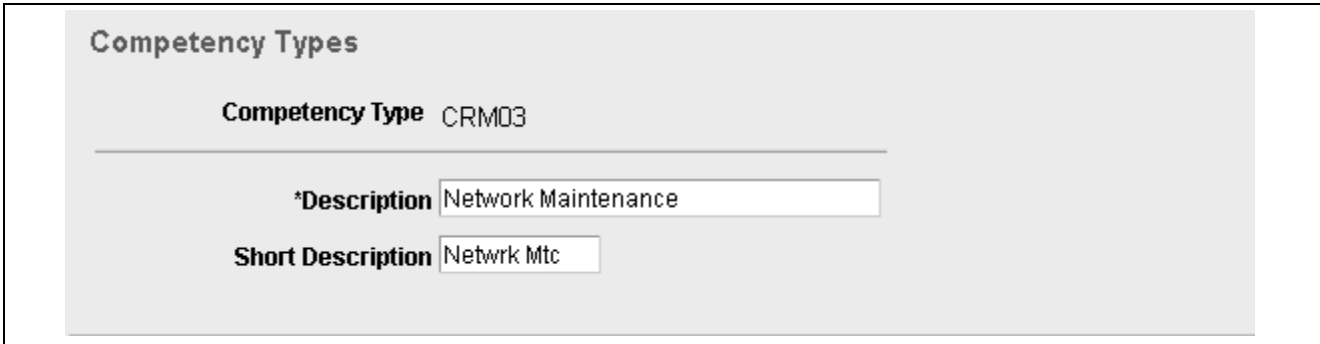
Rating	Enter a code that represents the rating level. When defining a rating, you must enter a code by using one alphanumeric character.
Description	<div>Enter a description of the rating code by using up to 30 alphanumeric characters.</div> <div>Note. Include the numeric number of the rating at the beginning of the rating level description. This enables the system to display the rating descriptions in numerical order instead of alphabetical order on the prompts where users select ratings levels.</div>
Rating Points	<div>Enter a numeric value that the assignment engine uses to represent the relative importance of each rating.</div> <div>Important! When defining rating point scales for rating models that are used to rate the proficiency of a provider group or worker, use a numeric rating system in which the highest number of points represents the highest level of proficiency. Otherwise, the fit score values that the assignment engine calculates will not accurately reflect the best qualified candidate. The minimum proficiency, however, is tied to a service, not within the rating model.</div>

See Also

[Chapter 13, “Setting Up and Performing Assignment Searches,” page 173](#)

Defining Competency Types

Access the Competency Types page.



Competency Types page

Although competency types are not used by the system, you can develop reports that reflect competency categories.

Defining Competencies

Access the Competencies page.

Competencies

Competency 2028

*Description Token Ring Networks

Short Description Token Ring

*Rating Model PSCM Competency Management Scale

Comments

Competency Types Customize | Find | First 1 of 1 Last

Type	Description
HARDW	Hardware and Networks + -

Competencies page

Competencies can represent any provider group or worker skills, abilities, knowledge, product support areas, or behaviors that are pertinent to jobs in the organization, such as the ability to repair and maintain specific products or equipment, knowledge of specialized manufacturing processes, or expertise with computer programming languages. The codes can be broad or detailed and can represent any type of competency.

To enable system-suggested assignments on service orders, define each skill that is required to complete work on a service order as a competency in your system. To enable system-suggested assignments on cases that are based on the problem type, category, type or detail that the user specifies, define competencies that correspond to this information.

Description

Enter a description that uses up to 30 alphanumeric characters.

Note. These descriptions should make sense to a user that is viewing a list of problem types. For example, competencies like *Works independently* or *Microsoft Certification* are probably not appropriate descriptions for problem-type competencies. If the product is a laptop, appropriate problem type competencies may include *hard drive* and *network connectivity*.

Rating Model

Select the model that is used to evaluate a provider group or worker's degree of expertise for this competency. Establish rating models on the Competency Rating Model page.

Type

Select competency types for this competency, if applicable. Establish competency types on the Competency Types page.

Defining Competency Proficiency Levels

You establish competency proficiency for provider groups on the Group Competencies page of the Provider Groups component. Similarly, you establish competency proficiency for workers on the Competencies page of the Worker component.

The system uses the level of competency proficiency that you define for provider groups and workers to evaluate whether the provider group or worker is qualified to perform work on a service order or provide support on a case. You can also track the competency proficiency of your workforce for informational purposes.

See Also

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, “Defining Workers”

Chapter 11, “Setting Up and Maintaining Provider Groups and Group Members,” page 151

Defining Minimum Competency Requirements for Service Orders or Cases

In PeopleSoft Integrated FieldService, the system evaluates which workers are qualified to perform work on a service order by matching the minimum level of competencies that you define for the associated service or service activity with workers’ proficiency for the corresponding competencies.

In PeopleSoft call center applications, you establish minimum competency proficiency requirements for the problem type, category, type or detail information on cases, which the system uses when performing call center agent assignment.

See Also

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

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

CHAPTER 13

Setting Up and Performing Assignment Searches

The chapter provides an overview of assignment searches and discusses how to:

- Set up the assignment searches.
- Reviewing and assigning provider groups.
- Reviewing and assigning group members.

Understanding Assignment Searches

This section discusses:

- Fit scores.
- Activity.
- Assignment criteria.
- Candidate selection and fit score generation.

Fit Scores

In PeopleSoft Customer Relationship Management (PeopleSoft CRM), you can perform assignment searches to find the provider groups and group members that are best suited to a case or service order. The system returns a list of eligible candidates ranked by *fit score*, which is an evaluation of how well each provider group or group member matched criteria on the case or service order.

In addition to fit score, the system displays current availability and, for group member assignment searches that are performed for a case, the number of open cases that are currently assigned to the group member.

The system doesn't restrict the workforce assignment only to what it suggests. You can select the provider group and group member that the system recommends, any provider group and group member on the list (regardless of the fit score, current availability, or case load), or any provider group and group member that does not appear on the list, to be assigned to a case or service order.

Activity

The system displays the activity from the service order.

Because a competency may be required for more than one activity, this column indicates the activity to which the competency applies. This column does not appear when you perform the assignment search from a case.

Assignment Criteria

PeopleSoft CRM uses the assignment engine to generate recommendations for provider group and group member assignments. The assignment engine uses this information in the assignment evaluation process:

- General assignment criteria
- Case-specific assignment criteria
- Service order-specific assignment criteria
- Weighting factors
- Assignment search data model.

General Assignment Criteria

For each worker or provider group, you can define a list of values that the worker or provider group specializes or supports under these criteria: customer, location, product, product group, region, and site.

When you perform an assignment search on a service order or case, the assignment engine matches the values of these criteria that are available on the service order or case to the values that are available on workers and provider groups. The weight, or relative importance, of each assignment criteria match determines a candidate's fit score.

Failure to match an assignment criteria value on a case or service order lowers the fit score but does not exclude a provider group or group member from the list of eligible candidates. However, if you do not select the Display Provider Groups and Group Members with no Criteria Matches check box on the Assignment Setup page, then a provider group or group member must match at least one criteria or competency value to be included in the list.

The assignment engine uses a different set of assignment criteria values when searching for a case in PeopleSoft HelpDesk or Support, or for a service order in PeopleSoft Integrated FieldService.

The table below illustrates:

- For help desk cases, the assignment engine matches values for location, product, product group, problem type, and category, type, and detail (CTD).
- For support cases, the assignment engine matches values for customer, site, region, product, product group, problem type, and CTD.
- For service orders, the assignment engine matches values for customer, site, region, product group, product, service (or service activity) competency.

Assignment Criteria	Used in Support Case?	Used in Help Desk Case?	Used in Service Order?
Competency - CTD	Yes	Yes	NA
Competency - Problem Type	Yes	Yes	NA
Competency - Service	NA	NA	Yes
Customer	Yes	NA	Yes

Assignment Criteria	Used in Support Case?	Used in Help Desk Case?	Used in Service Order?
Location	NA	Yes	NA
Product	Yes	Yes	Yes
Product Group	Yes	Yes	Yes
Region	Yes	NA	Yes
Site	Yes	NA	Yes

As mentioned in the table, the assignment engine uses the region information to perform service order and support case assignment. A region search occurs when the Incident Address group box is available on a Case or Service Order page (according to the associated configuration template) with a specified incident location. The assignment engine runs the region search based on the zip code that you specify in the incident location.

Note. This is only if the incident location is being displayed. If not, the region is determined by the customer specified. In this case, the region match starts with this region (not the parent region like it does for zip code)

Before using zip codes as regions as assignment criteria, you must:

- Use the Region component to add zip codes as individual regions.
- Create a region, such as the Santa Clara county, and make it the parent region for all appropriate zip codes.

Note. You should define regions with the category of *Geography*. .

When the assignment engine runs, the zip code of the incident location determines the region. The system looks for the zip code with a category of *Geography* in the region table and starts with the parent region for assignment matches.

The system continues to look at the region hierarchy and reports region matches for any provider groups and group members that match the parent or grandparent regions. For example, if the parent region of Santa Clara County is Northern California, then the system includes any provider groups or group members associated with Santa Clara County or Northern California. If the provider group or group member is associated with both Santa Clara and Northern California, the match will be on the lower region (in this case, Santa Clara County).

Case-Specific Assignment Criteria

For assignment searches that you perform for cases, you can match the problem type and CTD competencies of the case with competencies that are defined for group members and provider groups.

You can specify competencies for problem types, categories, specialty types and details to be used when the system performs an assignment search from a case in PeopleSoft Support or HelpDesk.

The assignment engine matches the competency values in these fields on the case with group members or provider groups that are associated with the same competency values. Any provider group or group member that does not meet the minimum competency proficiency defined for the CTD or problem type will not have a match for the competency.

Note. There is a hierarchical relationship among category, specialty type, and detail. A category includes specialty types, which contain details. When all three levels of information are available in a case that needs to be assigned, the value from the lowest available level is used in the assignment search. For example, if the case has a category, specialty type and detail, the assignment uses the competency information that is defined for detail when performing the assignment search. If it has category and specialty type, the system uses the competency information for type. If it has only the category, the system uses the competency information for category.

Service Order-Specific Assignment Criteria

For assignment searches that you perform for service orders, the assignment engine matches (besides general assignment criteria) the competency proficiency of provider groups and group members with the minimum competency proficiency requirements on the service (or service activity). Any provider group or group member that does not meet the minimum competency proficiency that is defined for the service or service activity will not have a match for the competency.

The service competency data that the assignment engine uses depends on:

- Whether competency data is defined for a service or service activity.
- Whether the assignment search is initiated from the service order activity actions section or the service order line.

If activities are defined for the service, the assignment engine uses only the competency requirements that are defined for the activities, even if competencies are also defined for the service.

If you perform the assignment search from the service order activity actions for a service with one or more activities, the system evaluates provider group or group member competency against the competency requirements that are defined for all activities that are associated with the service.

If you perform the assignment search from the service order line, the system considers only the competency requirements of the activity on the line.

If no activities are defined for the service, the assignment engine uses the competency information that is defined for the service. If no competencies are defined for the service, the assignment engine does not perform a competency match; it uses only assignment criteria matches to evaluate candidates for service order assignment.

Weighting Factors

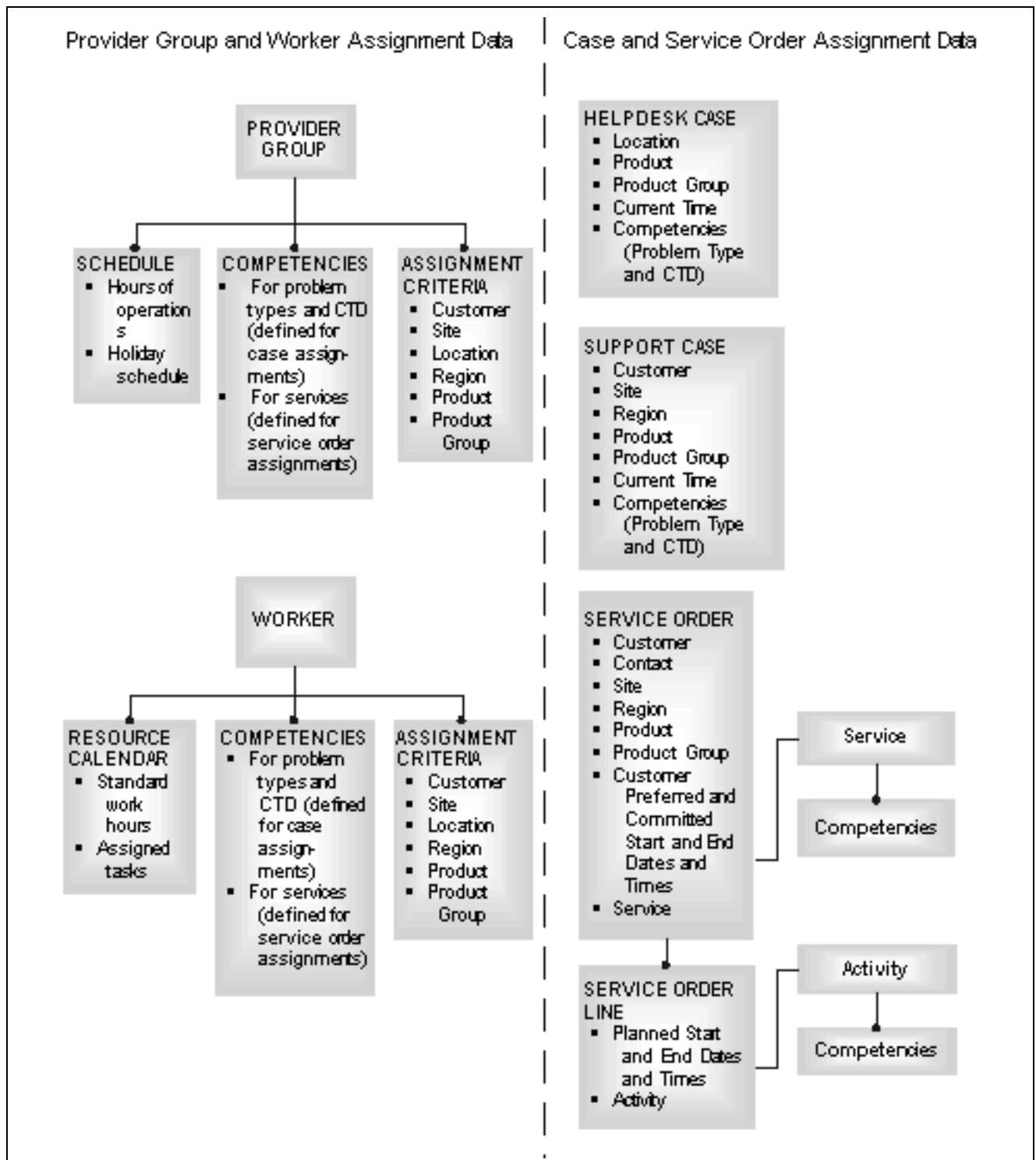
You can define the relative importance of assignment criteria for provider group and group member searches. These weights may differ between the provider group and group member.

For example, if the competency for CTD (applicable to support and help desk cases) has no importance when assigning provider groups in cases, but region is important, set the group weight for the CTD competency to 0 and the weight for region to 5.

If CTD competency and product are equally important and customer is somewhat important for group member searches, you can then set the weights to 5, 5, and 3, respectively.

Assignment Search Data Model

This diagram illustrates the information that the assignment engine uses to generate a list of provider group or worker candidates to assign to tasks on a help desk case, support case, or service order and to display current availability status:



Assignment Search Data Model

See Also

Chapter 12, “Managing Workforce Competencies,” page 167

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, “Defining Workers,” Maintaining Worker Information

Chapter 11, “Setting Up and Maintaining Provider Groups and Group Members,” page 151

Chapter 15, “Using Calendars,” page 205

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

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

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

Candidate Selection and Fit Score Calculations

For both provider group and group member searches, the assignment engine builds a table in the database that represents each criteria match between provider groups or group members and the values on a service order or case.

After completing the search, the system returns a list of the provider groups or group members with criteria matches. The aggregate fit score of the provider groups or group members sequences the list.

Evaluating Workforce Assignment

For each assignment criteria match between a provider group or group member and the evaluated help desk case, support case, or service order, the system inserts a row into a temporary table called Criteria Fit (RF_ASSIGN_FIT).

Each row includes the name of the group member or provider group, the criteria that was matched, and the relative importance, or weight, of the match. The weight value for the match becomes the number of points that are assigned to the match.

For matches on problem type competency, CTD competency, or both, the number of points depends on the number of competencies and the provider group or group member’s proficiency for those competencies.

For service competency matches, the number of points also depends on the number of competencies and the provider group or group member’s proficiency for those competencies. For these reasons, the number of competency points may be less than the competency weight.

Determining Workforce Availability

The system determines the availability status of each provider group or group member. For provider groups, the system checks the hours of operation and the holiday schedule that you define for the provider group on the Schedule page in the Provider Group component.

If the customer preferred (or committed if customer preferred doesn’t exist, start and end dates and times on a service order, or the current date and time on a case, correspond to an open period for the provider group, and if the start and end dates are not on their holiday schedule, the provider group is considered available for assignment.

For group members, the system checks for tasks on the worker’s resource calendar as well as the worker’s schedule.

If the customer preferred start and end dates and times on a service order (if they don't exist, the system uses the committed dates), or the current date and time on a case, correspond to a period during the group member's standard work hours for which no other task has been assigned, the group member is considered available for assignment.

Establish standard workweek and workday hours during installation on the Calendar Options page (select Set Up CRM, Install, Installation Options). You can modify an individual worker's standard hours on the Schedule page in the Worker component.

Displaying Case Load for Candidates

For group member assignment searches that you perform from a case, the system determines how many open cases are currently assigned to the group member. To facilitate workload balancing, this information appears for each agent who is returned for a group member search.

Calculating Candidate Fit Scores

For each provider group or group member with a criteria match that is recorded in the Criteria Fit table, the system sums the weight value that is associated with each criteria match row and calculates the fit score for the provider group or group member using this equation: Fit score =

$$\frac{\text{Total number of match points for the provider group or group member}}{\text{Number of possible match points for the case or service order}} \times 100$$

where the number of possible match points is defined by the criteria weight factor.

For example, for a group member assignment search, suppose that Jon Smith matched three assignment criteria (region, customer, and site) on a service order for which no competency requirements were defined, and this is the weight for each of the matching assignment criteria that applies to service orders:

- Customer = 5
- Region = 4
- Product = 3
- Site = 0
- Competency - Service = 4

The total number of possible match points is the total of the weight values: $5 + 4 + 3 + 0 + 4 = 16$.

For the service order in this example, Jon Smith matched region, customer, and site. His total number of match points is calculated as follows:

$$4 + 5 + 0 = 9$$

$$\text{Jon's fit score} = \frac{9}{16} \times 100 = 56\%$$

Accounting for Competency Proficiency on a Service Order

When calculating fit scores for service order assignments, the assignment engine accounts for the provider group or group member's competency proficiency and the relative importance of the competency that is defined for the service or service activity using this equation:

$$\text{Competency score} = \frac{(C1Wt * C1CP) + (C2Wt * C2CP) + \dots (CnWt * CnCP)}{(C1Wt * C1MP) + (C2Wt * C2MP) + \dots (CnWt * CnMP)}$$

- $CnWt$ is the weight of the competency defined for the service or service activity.
- $CnCP$ is the candidate's proficiency rating for the competency.
- $CnMP$ is the maximum proficiency rating.

For example, suppose that the service order in the previous example was for an air-conditioner maintenance service with no activities. The air-conditioner maintenance service has two competency requirements: basic maintenance and compressor replacement.

The basic maintenance competency requires a minimum proficiency of 2 on a 1 to 6 rating scale, where 6 is the maximum proficiency rating. The compressor replacement competency requires a minimum proficiency of 3 on the same rating scale.

The service definition for air-conditioner maintenance weights the relative importance of the basic maintenance competency for performing the service as a 5 on a 0 to 5 scale, while the relative importance of the compressor replacement competency is weighted at 2 on the same scale.

This table summarizes the competency data for the air-conditioner maintenance service:

Competency	Minimum Proficiency	Relative Importance to the Service ($CnWt$)	Maximum Proficiency on Rating Model ($CnMP$)
Basic Maintenance (C1)	2	5	6
Compressor Replacement (C2)	3	2	6

This table shows the competency proficiency rating for three technicians, Jon Smith, Bill Jones, and Jane Markowitz:

Worker	Basic Maintenance Competency Proficiency ($C1CP$)	Compressor Replacement Competency Proficiency ($C2CP$)
Jon Smith	4	3
Bill Jones	2	0
Jane Markowitz	5	4

The competency score for each technician is calculated as follows:

$$\text{Jon Smith's competency score} = \frac{(5 * 4) + (2 * 3)}{(5 * 6) + (2 * 6)} = 0.62$$

$$\text{Bill Jones' competency score} = \frac{(5*2)}{(5*6) + (2*6)} = 0.24$$

Notice that Bill Jones did not match the proficiency requirements for the compressor replacement competency; therefore, no points for the match are included in the calculation.

$$\text{Jane Markowitz's competency score} = \frac{(5*5) + (2*4)}{(5*6) + (2*6)} = 0.79$$

To calculate the fit score for each worker, the competency score is multiplied by the assignment weighting factor of the corresponding assignment criterion, which is defined for you in your installation.

Let's assume that the same criteria weight factors as in the previous fit score calculation example: Customer = 5, Region = 4, Product = 3, Site = 0, Competency - Service = 4.

Let's also assume that, except for the competency proficiency on competency - service, Jon, Bill, and Jane matched on identical criteria. Their fit scores are calculated as follows:

$$\text{Jon Smith's fit score} = 4+5+0+(4*0.62)/ 5+4+3+0+4 = 0.717$$

$$\text{Bill Jones's fit score} = 4+5+0+(4*0.24)/ 5+4+3+0+4 = 0.622$$

$$\text{Jane Markowitz's fit score} = 4+5+0+(4*0.79)/5+4+3+0+4 = 0.76$$

The assignment engine sorts these candidates:

- Jane Markowitz, 76%
- Jon Smith, 72%
- Bill Jones, 62%

If you view the detail scores, the system displays the criteria matches that compose the fit scores. For example, under Jon Smith's name, you would see this breakdown:

Criteria	Competency	Score
Region	NA	4/16 = 25%
Customer	NA	5/16 = 31.3%
Site	NA	0/16 = 0%
Competency - Service	Basic Maintenance	(4 x (5 x 4) / 42) / 16 = 11.90%
Competency - Service	Compressor Replacement	(4 x (2 x 3) / 42) / 16 = 3.6%

Accounting for Competency Proficiency on a Case

Similar to calculating service and service activity competencies, when the assignment engine calculates fit scores for case assignments, it accounts for the provider group or group member's competency proficiency and the relative importance of the competency values that are specified for problem type or CTD on the case using this equation:

$$\text{Competency score} = \frac{(C1Wt * C1CP) + (C2Wt * C2CP) + \dots (CnWt * CnCP)}{(C1Wt * C1MP) + (C2Wt * C2MP) + \dots (CnWt * CnMP)}$$

- $CnWt$ is the weight of the competency that is defined for the problem type or CTD.
- $CnCP$ is the candidate's proficiency rating for the competency.
- $CnMP$ is the maximum proficiency rating.

For example, suppose that the case involves a problem with a personal computer (PC) and the required problem type competency and category competency are IBM PC Hardware and PC Configuration, respectively. If Jon Smith has a proficiency of 4 on a 1 to 6 rating scale for both competencies, then Jon's competency score for problem type is:

$$\frac{4}{6} = 0.666$$

His competency score for the category is also 0.666.

Let's assume that the following criteria weight factors are set:

Customer = 5, Region = 4, Product = 3, Site = 0, Competency - Problem Type = 4, Competency - CTD = 4.

If Jon Smith matches the customer and both competencies on the case, then his fit score is calculated as follows:

$$\text{Jon Smith's fit score} = \frac{5 + (4 * 0.666) + (4 * 0.666)}{5 + 4 + 3 + 0 + 4 + 4} = 0.516 \text{ or } 52\%$$

Accounting for Product Proficiency on a Service Order or Case

When calculating fit scores for service order and case assignments, the assignment engine accounts for the provider group or group member's product proficiency using this equation:

$$\text{Product score} = \frac{PCP}{PMP}$$

- PCP is the candidate's proficiency rating for the product.
- PMP is the maximum proficiency rating.

For example, suppose that the case or service order involves a problem with an air conditioner.

If Bill Jones has a proficiency of 2 for this product on a 1 to 6 rating scale, then Bill's product score is:

$$\frac{2}{6} = 0.333$$

Let's assume that the criteria weight factors are the same as in the previous examples:

Customer = 5, Region = 4, Product = 3, Site = 0, Competency - Problem Type = 4, Competency - CTD = 4.

If Bill Jones matches the customer and product on the case or service order, this is how his fit score is calculated:

$$\text{Bill Jones' fit score} = \frac{5 + (3 * 0.333)}{5 + 4 + 3 + 0 + 4 + 4} = 0.299 \text{ or } 30\%$$

See Also

[Chapter 11, “Setting Up and Maintaining Provider Groups and Group Members,” page 151](#)

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, “Defining Workers,” Maintaining Worker Information

[Chapter 12, “Managing Workforce Competencies,” page 167](#)

Setting Up the Assignment Searches

To define assignment searches, use the Worker (RD_WORKER_2), Provider Group (RF_PROVIDER_GRP), Service (RE_SERVICE), Problem Type (RC_PROB_TYPE), Category Type Detail (RC_CA_TY_DE_PNL), Assignment Weight Groups (RF_ASSIGN_WGHT) and Assignment Weight (RF_ASSIGNMENT_WGHT) components.

This section discusses how to:

- Define worker schedules and assignment criteria.
- Define provider group schedules and assignment criteria.
- Associate competency information with services and service activities.
- Associate competency information with problem types.
- Associate competency information with categories, and specialty types and details.
- Establish weighting factors for provider group criteria matches.
- Establish weighting factors for group member criteria matches.
- Specify assignment engine setup.

Pages Used to Set Up Assignment Searches

Page Name	Object Name	Navigation	Usage
Job Detail	RD_WORKER_DETAIL	Workforce, Search Worker, Job Detail	Specify a holiday schedule for the worker. This information helps to determine worker's availability.
Work Schedule	RD_WORKER_SCHEDULE	Workforce, Search Worker, Work Schedule	Specify worker's workday information if it differs from the information that you define for the installation on the Calendar Option page. This information helps to determine worker's availability.
Skills and Competencies	RD_WORKER_CMP_PROF	Workforce, Search Worker, Skills and Competencies	Associate competency information with the worker. This information is optional.

Page Name	Object Name	Navigation	Usage
Assignment Criteria	RD_WORKER_CRITERIA	Workforce, Search Worker, Assignment Criteria	Define assignment criteria for the worker. This information is optional.
Schedule	RF_PROVGRP_TIME	Workforce, Provider Groups, Schedule	Specify a holiday schedule and workday information for the provider group. This information helps to determine provider group's availability.
Assign Group Criteria	RF_PRV_GRP_CRIT	Workforce, Provider Groups, Assign Group Criteria	Define assignment criteria for the provider group. The Region criterion is required when defining provider groups.
Group Competencies	RF_PRVGRP_COMP	Workforce, Provider Groups, Group Competencies	Associate competency information with the provider group. This information is optional.
Service Details	RF_SERVICE_ATTRIB	Set Up CRM, Product Related, FieldService, Services, Service Details	Associate competency information with the service. This information is optional.
Service Activities	RF_SERVICE_ACT	Set Up CRM, Product Related, FieldService, Services, Service Activities	Associate competency information with the service activity. This information is optional.
Problem Type	RC_PROBTYPE	Set Up CRM, Product Related, Call Center, Problem Type, Problem Type	Associate competency information with the problem type. You use problem types to associate competencies with products that a worker needs to resolve a problem with the product. This information is optional.
Category	RC_CATEGORY	Set Up CRM, Product Related, Call Center, Category/Type/Detail, Category	Associate competency information with the category. This information is optional.
Type and Detail	RC_CA_TY_DE_PNL	Set Up CRM, Product Related, Call Center, Category/Type/Detail, Type and Detail	Associate competency information with the type and detail. This information is optional.

Page Name	Object Name	Navigation	Usage
Group Weighting Factors	RF_ASSIGN_WGHT_PG	Set Up CRM, Common Definitions, Codes and Auto Numbering, Assignment Weighting Factors, Group Weighting Factors	Establish the relative importance of assignment criteria matches for customer, location, product, product group, region, site, and competency values on CTD, problem type, and service during assignment searches for provider groups.
Member Weighting Factors	RF_ASSIGNMENT_WGHT	Set Up CRM, Common Definitions, Codes and Auto Numbering, Assignment Weighting Factors, Member Weighting Factors	Establish the relative importance of assignment criteria matches for customer, location, product, product group, region, site, and competency values on CTD, problem type, and service during assignment searches for provider group members.
Assignment Setup	RF_PRD_RATE_MDL	Set Up CRM, Common Definitions, Codes and Auto Numbering, Assignment Weighting Factors, Assignment Setup	Specify the rating model that is used to define proficiency levels for product competencies and configure search results.

Defining Worker Schedules and Assignment Criteria

Define workers using the Worker component.

Specifying Holiday Schedules

Access the Job Detail page.

Note. You are not required to define standard workweek information for your installation or for individual workers. However, the system requires this information to create entries automatically on a worker's calendars when a service order is assigned to the worker.

See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, “Defining Workers,” Entering Job Information.

See Chapter 14, “Defining Holiday Schedules,” page 197.

Specifying Workday Information

Access the Work Schedule page.

See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, “Defining Workers,” Defining Default Schedules.

Associating Competencies with Workers

Access the Skills and Competencies page.

See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, “Defining Workers,” Associating Competencies with Workers.

See Chapter 12, “Managing Workforce Competencies,” page 167.

Defining Assignment Criteria

Access the Assignment Criteria page.

See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, “Defining Workers,” Defining Job Assignment Criteria.

See Chapter 11, “Setting Up and Maintaining Provider Groups and Group Members,” Defining Group Assignment Criteria and Competencies, page 162.

See Also

Chapter 11, “Setting Up and Maintaining Provider Groups and Group Members,” page 151

Defining Provider Group Schedules and Assignment Criteria

Every worker who can be assigned to a case or a service order must be associated with an active provider group. Define provider groups using the Provider Group component.

Specifying Holiday Schedules and Workday Information

Access the Schedule page.

See Chapter 11, “Setting Up and Maintaining Provider Groups and Group Members,” Defining Schedules for Provider Groups, page 160.

Defining Assignment Criteria

Access the Criteria page.

See Chapter 11, “Setting Up and Maintaining Provider Groups and Group Members,” Defining Assignment Criteria, page 162.

Associating Competency Information with the Provider Group

Access the Group Competencies page.

See Chapter 11, “Setting Up and Maintaining Provider Groups and Group Members,” Associating Competencies with Provider Groups, page 164.

See Also

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, “Defining Workers,” Defining Job Assignment Criteria

Associating Competency Information with Services and Service Activities

Access the Service Details and Service Activities pages.

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

See *PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook*, “Setting Up Services,” Defining Services.

See *PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook*, “Setting Up Services,” Defining Activities.

Associating Competency Information with Problem Types

Access the Problem Type page.

See *PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook*, “Setting Up Call Center Prompt Tables,” Setting Up Prompt Tables for Cases.

Associating Competency Information with Categories, Specialty Types, and Details

Access the Category and Type and Detail pages.

See *PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook*, “Setting Up Call Center Prompt Tables,” Setting Up Prompt Tables for Cases.

Establishing Weighting Factors for Provider Group Criteria Matches

Access the Group Weighting Factors page.

Group Weighting Factors		Member Weighting Factors		Assignment Setup		
SetID CRM01						
Weight						
Rate each factor from 1 (least) to 5 (most). Select N/A if the factor does not apply.						
	Least Important		Most Important			
Competency - CTD	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input checked="" type="radio"/> N / A
Competency - Problem Type	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input checked="" type="radio"/> N / A
Competency - Service	<input type="radio"/> 1	<input type="radio"/> 2	<input checked="" type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input type="radio"/> N / A
Customer	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input checked="" type="radio"/> 5	<input type="radio"/> N / A
Department	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input checked="" type="radio"/> N / A
Location	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input checked="" type="radio"/> N / A
Product	<input type="radio"/> 1	<input type="radio"/> 2	<input checked="" type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input type="radio"/> N / A
Product Group	<input type="radio"/> 1	<input checked="" type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input type="radio"/> N / A

Group Weighting Factors page (1 of 2)

Role	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input checked="" type="radio"/> 5	<input type="radio"/> N / A
Site	<input checked="" type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input type="radio"/> N / A

Group Weighting Factors page (2 of 2)

Select the relative importance of a provider group's assignment criteria matches for competency on CTD (support and help desk cases), problem type (support and help desk cases), service (service orders), customers (service orders and support cases), department (help desk cases), locations (help desk cases), products (all), product groups (all), regions (service orders and support cases), roles (change management only), and sites (service orders and support cases).

See Also

Chapter 11, "Setting Up and Maintaining Provider Groups and Group Members," page 151

Establishing Weighting Factors for Group Member Criteria Matches

Access the Member Weighting Factors page.

Group Weighting Factors	Member Weighting Factors	Assignment Setup
SetID CRM01		
Weight		
Rate each factor from 1 (least) to 5 (most). Select N/A if the factor does not apply.		
	Least Important	
	Most Important	
Competency - CTD	<input type="radio"/> 1	<input type="radio"/> 2
	<input type="radio"/> 3	<input type="radio"/> 4
	<input type="radio"/> 5	<input checked="" type="radio"/> N / A
Competency - Problem Type	<input type="radio"/> 1	<input type="radio"/> 2
	<input type="radio"/> 3	<input type="radio"/> 4
	<input type="radio"/> 5	<input checked="" type="radio"/> N / A
Competency - Service	<input type="radio"/> 1	<input type="radio"/> 2
	<input type="radio"/> 3	<input checked="" type="radio"/> 4
	<input type="radio"/> 5	<input type="radio"/> N / A
Customer	<input type="radio"/> 1	<input type="radio"/> 2
	<input type="radio"/> 3	<input type="radio"/> 4
	<input checked="" type="radio"/> 5	<input type="radio"/> N / A
Department	<input type="radio"/> 1	<input type="radio"/> 2
	<input type="radio"/> 3	<input type="radio"/> 4
	<input type="radio"/> 5	<input checked="" type="radio"/> N / A
Location	<input type="radio"/> 1	<input type="radio"/> 2
	<input type="radio"/> 3	<input type="radio"/> 4
	<input type="radio"/> 5	<input checked="" type="radio"/> N / A
Product	<input type="radio"/> 1	<input type="radio"/> 2
	<input checked="" type="radio"/> 3	<input type="radio"/> 4
	<input type="radio"/> 5	<input type="radio"/> N / A
Product Group	<input type="radio"/> 1	<input checked="" type="radio"/> 2
	<input type="radio"/> 3	<input type="radio"/> 4
	<input type="radio"/> 5	<input type="radio"/> N / A

Member Weighting Factors page (1 of 2)



Region	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input checked="" type="radio"/> 4	<input type="radio"/> 5	<input type="radio"/> N / A
Role	<input type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input checked="" type="radio"/> 5	<input type="radio"/> N / A
Site	<input checked="" type="radio"/> 1	<input type="radio"/> 2	<input type="radio"/> 3	<input type="radio"/> 4	<input type="radio"/> 5	<input type="radio"/> N / A

Member Weighting Factors page (2 of 2)

Select the relative importance of a of a group member's assignment criteria matches for competency on CTD (support and help desk cases), problem type (support and help desk cases), service (service orders), customers (service orders and support cases), department (help desk cases), locations (help desk cases), products (all), product groups (all), regions (service orders and support cases), roles (change management), and sites (service orders and support cases).

Specifying Assignment Engine Setup

Access the Assignment Setup page.

Group Weighting Factors	Member Weighting Factors	Assignment Setup
SetID CRM01		
Options		
*Rating Model	PSCM 	
*Default Assignment Page	Summary 	
<input type="checkbox"/> Display Provider Groups and Group Members with no Criteria Matches		

Assignment Setup page

Rating Model

Enter the rating model to indicate required proficiency levels for products. Establish rating models on the Competency Rating Model page.

Default Assignment Page

Select the page that the system initially returns when you perform a search. Values are:

Summary: The system displays the Provider Group Summary page when you perform a provider group search and the Candidate Summary page when you perform a provider group member search for a technician or agent.

Detail: The system displays the Provider Group Detail page when you perform a provider group search and the Candidate Detail page when you provide a provider group member search for a technician or agent.

Display Provider Groups and Group Members with no Criteria Matches

Select to enable all provider groups and group members to appear as part of the assignment engine search results when you click Suggest a Provider Group or Suggest a Group Member from a case or service order. Clear this check box if only the provider groups and group members that have criteria matches should appear in the search results.

See Also

[Chapter 12, "Managing Workforce Competencies," Defining Competency Rating Models, page 169](#)

Reviewing and Assigning Provider Groups

This section lists common elements and discusses how to:

- Review provider group summary search results and assign provider groups.
- Review provider group detail search results and assign provider groups.

See Also

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, “Creating and Managing Service Orders,” Setting Up Automatic Service Order Assignments

Common Elements Used in This Section





Provider Group Name	Displays the name of the eligible provider group. Click the Transfer to Provider Group button next to the name to access the Provider Group component and view the provider group definition record.
Select	Click to assign the selected provider group to the corresponding service order or case.
Available	Displays the group or group member’s availability. A green circle indicates availability; a red square indicates unavailability.
<hr/> Note. The Available column does not appear if you do not specify a start or end period on the service order. <hr/>	
Score	Displays the provider group’s score for the criteria match based on the assignment weight factor that is defined on the Group Weighting Factors page in the Assignment Engine Setup component.
Total Score	Displays the total fit score of the provider group.
Return To Service Order and Return To Case	Click to return to the component (service order or case, respectively), where you access this page.

Pages Used to Review and Assign Provider Groups

Page Name	Object Name	Navigation	Usage
Provider Group Summary	RF_ASSIGN_PG_SEC	<ul style="list-style-type: none"> On the Service Order - Activities page in PeopleSoft FieldService, click the Suggest Group button. <p>Click the Summary link if the Provider Group Detail page appears.</p> <ul style="list-style-type: none"> On the Case page in PeopleSoft Support or HelpDesk, click the Suggest a Provider Group button. <p>Click the Summary link if the Provider Group Detail page appears.</p> <ul style="list-style-type: none"> On the Dispatch Board page click the Suggest a Provider Group button. 	Review the provider group search result (summary view) and select a provider group that you can assign to a service order or a case.
Provider Group Detail	RF_ASSIGN_PGDT_SEC	<ul style="list-style-type: none"> On the Service Order - Activities page in PeopleSoft FieldService, click the Suggest Group button. <p>Click the Detail link if the Provider Group Summary page appears.</p> <ul style="list-style-type: none"> On the Case page in PeopleSoft Support or HelpDesk, click the Suggest a Provider Group button. <p>Click the Detail link if the Provider Group Summary page appears.</p> <ul style="list-style-type: none"> On the Dispatch Board page click the Suggest a Provider Group button. <p>Click the Detail link if the Provider Group Summary page appears.</p>	Review the provider group search result (detail view). You can select a provider group that you can assign to a service order or a case from here as well.

Reviewing Provider Group Summary Search Results and Assigning Provider Groups

Access the Provider Group Summary page.

Service Order		
Provider Group Summary		
Provider Groups		Customize Find 
Score	Provider Group Name	
42%	Appliances Eastern 	Select
42%	Appliances Western 	Select
33%	Telemarketing East 	Select
Go to: Detail Return to Service Order		

Provider Group Summary page

The Provider Group Summary page lists provider groups that matched at least one assignment criteria value on the case or service order.

Detail Click to access the Provider Group Detail page and view the assignment weight factors that are used to calculate the fit scores.

Reviewing Provider Group Detail Search Results and Assigning Provider Groups

Access the Provider Group Detail page.


Service Order




Provider Group Detail

Provider Groups

Customize

Find



Score	Total Score	Provider Group Name	Criteria Code	Description	
41.7%	41.7%	Appliances Eastern 	Customer	MMA Property Management Group	Select
41.7%	41.7%	Appliances Western 	Customer	MMA Property Management Group	Select
33.3%	33.3%	Telemarketing East 	Region	Midwest - USA	Select

Go to: [Summary](#) [Return to Service Order](#)

Provider Group Detail page

Summary Click to access the Provider Group Summary page.

Criteria Code Displays the assignment criterion on the case or service order that the provider group matched.

Reviewing and Assigning Group Members

This section lists common elements and discusses how to:

- Review group member summary search results and assign group members.

- Review group member detail search results and assign group members.

See Also

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, “Creating and Managing Service Orders,” Setting Up Automatic Service Order Assignments

Common Elements Used in This Section





Select	Select this check box to indicate a group member to assign, and then click the Select button. If the assignment is for a service order line, you can select multiple group members.
Name	Displays the name of the eligible group member. Click the Transfer to Worker button to access the Worker component and view the worker definition record.
Cases	Displays the number of cases that are assigned to an agent. This column appears only for worker assignment searches that you perform from a case in PeopleSoft Support or HelpDesk.
Score	Displays the group member’s score for each criteria match based on the criteria assignment weight factor for the criteria code that you define on the Member Weighting Factors page in the Assignment Engine Setup component.
Total Score	Displays the total fit score of the group member.
Return To Service Order and Return To Case	Click to return to the service order or case from which you accessed this page.

Pages Used to Review and Assign Group Members

Page Name	Object Name	Navigation	Usage
Candidate Summary	RF_ASSIGN_LIST_SEC	<ul style="list-style-type: none"> On the Service Order - Activities page in PeopleSoft FieldService, click the Suggest Group Member button. Click the Summary link if the Candidate Detail page appears. On the Case page in PeopleSoft Support or HelpDesk, click the Suggest an Agent button. Click the Summary link if the Candidate Detail page appears. On the Dispatch Board page, click the Suggest Group Member button. Click the Summary link if the Candidate Detail page appears. 	Review the group member search result (summary view) and select group members that you can assign to a service order or a case.
Candidate Detail	RF_ASSIGN_DET_SEC	<ul style="list-style-type: none"> On the Service Order - Activities page in PeopleSoft FieldService, click the Suggest Group Member button. Click the Detail link if the Candidate Summary page appears. On the Case page in PeopleSoft Support or HelpDesk, click the Suggest an Agent button. Click the Detail link if the Candidate Summary page appears. On the Dispatch Board page, click the Suggest Group Member button. Click the Detail link if the Candidate Summary page appears. 	Review the group member search result (detail view). You can select a group member that you can assign to a service order or a case from here as well.

Reviewing Group Member Summary Search Results and Assigning Group Members

Access the Candidate Summary page.

Service Order			
Candidate Summary			
Candidates			
Customize Find 			
Select	Score	Available	Name
<input type="checkbox"/>	69%	●	Bill Kilmer 
<input type="checkbox"/>	16%	●	Daniel Perry 
<input type="checkbox"/>	8%	●	Leslie Chung 
<input type="button" value="Select"/> Go to: Detail Return to Service Order			

Candidate Summary page

The Candidate Summary page lists the members in the provider group who matched at least one assignment criteria value on the case or service order, or all provider group members if you select the *Display Provider Groups and Group Members with no Criteria Matches* check box on the Assignment Setup page. For support and help desk cases, the system shows the number of open cases that are currently assigned to each group member on the list.





Note. You must specify a provider group on the case or service order before performing a search on group members.

Detail

Click to access the Candidate Detail page and view the assignment weight factors that are used to calculate the total fit scores.

Reviewing Group Member Detail Search Results and Assigning Group Members

Access the Candidate Detail page.

Service Order							
Candidate Detail							
Candidates							
Customize Find 							
Select	Score	Total Score	Available	Name	Criteria Code	Description	Activ
<input type="checkbox"/>	21.7%	68.8%	●	Bill Kilmer 	Customer	Shoreview Medical	
	17.4%				Product Group	Walk-In Coolers	
	13.9%				Product	Custom Build Freezer Package	
	10.9%				Competency - Service	Appliances Service & Repair	Repa
	4.9%				Competency - Service	Customer Service Orientation	Therr
<input type="checkbox"/>	13.0%	15.8%	●	Daniel Perry 	Region	Western	
	2.7%				Competency - Service	Appliances Service & Repair	Repa
	4.9%	7.7%	●	Leslie Chung 	Competency - Service	Customer Service Orientation	Therr
	2.7%				Competency - Service	Appliances Service & Repair	Repa
<input type="button" value="Select"/> Go to: Summary Return to Service Order							

Candidate Detail page

Summary

Click to return to the Candidate Summary page.

Criteria Code

Displays the assignment criterion on the case or service order that the candidate matched. Associate values for each criteria code with workers on the Assign Criteria page in the Worker component.

CHAPTER 14

Defining Holiday Schedules

This chapter provides an overview of holiday schedules and discusses how to:

- Define holiday schedules.
- Associate provider groups with holiday schedules.
- Associate workers with holiday schedules.
- Update workers' calendars with specified holiday schedules.

Understanding Holiday Schedules

In PeopleSoft Customer Relationship Management (PeopleSoft CRM), you can associate holiday schedules with provider groups and individual workers. You can schedule a process to update worker calendars to reflect holiday information. On calendars, holidays appear as a type of task.

In PeopleSoft Integrated FieldService, the assignment engine indicates on the assignment search result that an eligible provider group or worker is unavailable for assignment if the period that the committed start and end dates defined on a service order coincides with a defined holiday.

Similarly, in PeopleSoft call center applications, the assignment engine indicates that a provider group or worker is unavailable for case assignment if the date on which you perform the assignment search corresponds with a defined holiday. (Regardless of availability, however, you can always manually assign provider groups and workers to a case or service order.)

Important! Workers do not inherit holiday schedules from their provider groups.

Because workers can belong to multiple provider groups, you must define and maintain holiday schedules for workers and provider groups separately. If you want workers to inherit holiday schedules from their provider groups, you must institute a manual process to ensure synchronization of holiday schedules.

Defining Holiday Schedules, Time Frames, and Sales Quota Rollups

To define holiday schedules, time frames and sales quotas, use the Installation (RB_INSTALLATION), Holiday Schedule (HOLIDAY_SCHED) and Time Frames (RSF_TF) components.

This section discusses how to:

- Define standard workday information.

- Define holidays.
- Define time frames for forecasting, pipeline analysis, planning and portfolio examination.
- Define time frames for sales quota relapse.

Pages Used to Define Holiday Schedules

Page Name	Object Name	Navigation	Usage
Calendar Options	RF_INSTALLATION	Set Up CRM, Install, Installation Options, Calendar Options	Define standard workday information. The system uses the start and end times on this page as the start and end times of any holiday that you define. The system displays these times on workers' calendars.
Holiday Schedule	HOLIDAY_SCHED_TBL	Set Up CRM, Common Definitions, Calendars and Schedules, Holiday Schedule, Holiday Schedule	Define holidays.
Timeframes	RSF_TF_MAIN	Set Up CRM, Common Definitions, Calendars and Schedules, Time Frames, Time Frames	Define time frames for forecasting, pipeline analysis, planning and portfolio examination.
Sales Information	RSF_TF	Set Up CRM, Common Definitions, Calendars and Schedules, Time Frames, Sales Information	Define time frames for sales quota rollups.

Defining Standard Workday Information

Access the Calendar Options page.

See [Chapter 3, “Setting Up General Options,” Setting Up PeopleSoft Enterprise CRM Application Installation Options, page 22](#).

Defining Holidays

Access the Holiday Schedule page.

Holiday Schedule

Holiday Schedule DBE

Schedule Information

***Description** Germany

Short Description Germany

Holiday Details [Customize](#) | [Find](#) | First 1 of 1 Last

*Holiday	Description
10/03/2004	Tag der Deutschen Einheit

Holiday Schedule page

When you add a new date to the list of holidays, enter a description (up to 30 alphanumeric characters). This description appears on the workers' calendars.

Define Time Frames for Forecasting, Pipeline Analysis, Planning, and Portfolio Examination

Access the Timeframes page

Timeframes [Sales Information](#)

Time Frame Group

Time Frame Group 2004 BY QUARTER ***Description** 2004 by Quarter

Time Frame Periods

Period Definition		Usage & Status				
*Frequency	*Period	Time Frame	*Begin Date	*End Date	*Description	Short Description
Annual	2004FY	2004 BY QUARTER-2004FY	01/01/2004	12/31/2004	2004 Fiscal Year	
Quarterly	Q1	2004 BY QUARTER-Q1	01/01/2004	03/31/2004	2004 Q1	
Quarterly	Q2	2004 BY QUARTER-Q2	04/01/2004	06/30/2004	2004 Q2	
Quarterly	Q3	2004 BY QUARTER-Q3	07/01/2004	09/30/2004	2004 Q3	
Quarterly	Q4	2004 BY QUARTER-Q4	10/01/2004	12/31/2004	2004 Q4	
SemiAnnual	1H2004	2004 BY QUARTER-1H2004	01/01/2004	06/30/2004	1st Half 2004	
SemiAnnual	2H2004	2004 BY QUARTER-2H2004	07/01/2004	12/31/2004	2nd Half 2004	

Modified 10/16/2002 11:46AM PDT SAMPLE

Timeframes page

Period Definition Tab

Select the Period Definition tab.

Select the period (for example, annual, daily, monthly quarterly, and so on) for the time frame.

Enter a description of the period (for example, Q1, 2005 FY, and so on). The Time Frame field uses the name that you enter for the time frame and the text that you enter in the Period field to enter a description of the time frame.

Select the begin and end dates and then enter a long and short description for the period.

Usage and Status Tab

Select the Usage and Status tab.

Use the Period Use field to indicate how you plan to use the information generated in the time frame that you are defining. You can select either *All*, *Pipeline Only*, *Forecast and Pipeline*, and *Planning and Portfolio*. Use the Status field to indicate the status of the usage for the time frame.

Define Time Frames for Sales Quota Rollups

Access the Sales Information page.

Timeframes

Sales Information

Time Frame Group

Time Frame Group 2004 BY QUARTER

*Description 2004 by Quarter

Quota Information

☐ No Quotas
 ☒ Define Quotas By Time Frame
 ☐ Define Detailed Quotas

Quota Definition Period Type Quarterly

Define Detail Revenue Quota By

Time Frame Periods

Period Definition

Quota Rollup

*Frequency	*Period	Time Frame	*Begin Date	*End Date	*Description		
Annual	2004FY	2004 BY QUARTER-2004FY	01/01/2004	12/31/2004	2004 Fiscal Year	+	-
Quarterly	Q1	2004 BY QUARTER-Q1	01/01/2004	03/31/2004	2004 Q1	+	-
Quarterly	Q2	2004 BY QUARTER-Q2	04/01/2004	06/30/2004	2004 Q2	+	-
Quarterly	Q3	2004 BY QUARTER-Q3	07/01/2004	09/30/2004	2004 Q3	+	-
Quarterly	Q4	2004 BY QUARTER-Q4	10/01/2004	12/31/2004	2004 Q4	+	-
SemiAnnual	1H2004	2004 BY QUARTER-1H2004	01/01/2004	06/30/2004	1st Half 2004	+	-
SemiAnnual	2H2004	2004 BY QUARTER-2H2004	07/01/2004	12/31/2004	2nd Half 2004	+	-

Modified

10/16/2002 11:46AM PDT

SAMPLE

Sales Information page

After you enter the time frames on the Timeframes page and save it, select the Sales Information tab and enter quota information for the time frame group that is being defined.

Quota Information

Use the fields in this group box to define sales quotas by period definition (for example, annual, biweekly, daily, monthly, and so on). You can also use the Define Detailed Quotas option to define revenue details by business unit, product, product group, industry, region, revenue type, and territory.

Quota Rollup Tab

Select the Quota Rollup tab.

Use the Quota Rollup Period field to select the time period that the period should roll up to for reporting or forecasting reasons.

For example, suppose that you are entering monthly time frames based on a quarterly reporting system, the April, May and June periods should roll up to the 2nd quarter rollup period.

Associating Provider Groups with Holiday Schedules

Specify the appropriate holiday schedule on the Schedule page under Workforce, Provider Groups, Schedule.

The assignment engine checks the holiday schedule and hours of operation that you define for a provider group to determine whether an eligible provider group is available for assignment to a service order or case.

See Also

Chapter 11, “Setting Up and Maintaining Provider Groups and Group Members,” Defining Schedules for Provider Groups, page 160

Associating Workers with Holiday Schedules

Associate workers with the appropriate holiday schedule on the Job Detail page under Workforce, Worker, Job Detail.

When you select a holiday schedule for a worker, the system updates the worker’s calendar to reflect the selected holiday schedule when you save the record. If you don’t select a holiday schedule for a worker, no holidays are reflected on the worker’s calendar.

Note. If you change a worker’s holiday schedule on the Job Detail page, when a user saves the page, the system deletes all existing holidays on the worker’s calendar and records the holidays of the new schedule starting from the beginning of the calendar year.

See Also

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, “Defining Workers,” Defining Job Assignment Criteria

Updating Workers’ Calendars with Specified Holiday Schedules

This section discusses how to update workers’ calendars with specified holiday schedules.

Page Used to Update Workers' Calendars with Specified Holiday Schedules

Page Name	Object Name	Navigation	Usage
Holiday Load	RUN_CNTL_RF1000	Workforce, Load Holidays, Holiday Load	Update workers' calendars with specified holiday schedules.

Updating Workers' Calendars with Specified Holiday Schedules

Access the Holiday Load page.

Holiday Load

Run Control ID: aaa

Language: English

Report Manager

Process Monitor

Run

Load Criteria

☐ One Worker

☒ All Workers/One Schedule

☐ All Workers/All Schedules

Holiday Schedule

Holiday Load page

You should maintain one holiday schedule per region or per segment of your workforce and periodically add new dates to each holiday schedule to reflect the next year's official holidays. When you add additional dates to the holiday schedules that you define with the Holiday Schedule page, run the Load Holiday process (RF_HOLIDAY).

For example, you might define next year's holidays in the last quarter of this year. After defining the holiday dates for the coming year, run the Load Holiday process to have the system record the new dates on workers' calendars.

Note. When you run the Load Holiday process, the system updates workers' calendars to reflect the changes in the associated holiday schedule from the current date forward. If you delete a holiday for a date prior to the current date, the system does not delete the past holiday from the calendars. However, if you delete or add a holiday for a future date, the system updates calendars to reflect the holiday schedule changes.

Load Criteria

The Load Criteria group box indicates the parameters for the Holiday Load process. Before running the process, you must associate a holiday schedule with each worker who needs the update on the Job Detail page.

- One Worker**

Select to load the holiday schedule for the worker who you specify in the Name field. The system displays the Name field after you select this option.
- All Workers/One Schedule**

Select to load the holiday schedule that you specify in the Holiday Schedule field for all workers who are currently defined in the system and have the specified holiday schedule. The system displays the Holiday Schedule field after you select this option.

All Workers/All Schedules Select to load all holiday schedules that are associated with each worker in the system.

See Also

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Process Scheduler

CHAPTER 15

Using Calendars

This section provides an overview of calendars and discusses how to:

- Set up calendars.
- Integrate calendars with third-party applications.

Understanding Calendars

In PeopleSoft Customer Relationship Management (PeopleSoft CRM) every worker has access to their own My Calendar page to view their monthly, weekly, or daily calendars. Managers can update calendars to reflect daily tasks. In PeopleSoft Sales, system events can automatically update sales representatives' calendars to reflect leads and opportunities.

Similarly, in PeopleSoft Integrated FieldService, system events can automatically update technicians' calendars to reflect service order assignments. When suggesting eligible candidates to assign to a service order and case, the system checks for worker availability. If a worker has another task scheduled, or if the start and end times of the task are not within the worker's scheduled work hours, the system indicates that the worker is unavailable.

Note. License the PeopleSoft Infosync application to provide end users with the capability to synchronize data between their CRM calendar and PIM (Personal Information Manager) calendar. PeopleSoft Infosync supports the data synchronization of contacts, tasks and calendars between the CRM system and Microsoft Outlook or Lotus Notes. For more information on the product, visit the PeopleSoft website and search for the Infosync product under the Customer Relationship Management product line.

See Also

Chapter 13, "Setting Up and Performing Assignment Searches," page 173

PeopleSoft Enterprise Sales 8.9 PeopleBook, "Working with Territories"

Setting Up Calendars

This section discusses how to:

- View daily calendars.
- View weekly calendars.
- View monthly calendars.

Common Elements Used in this Section

Daily	Click this link to go to the daily calendar page.
Weekly	Click this link to go to the weekly calendar page.
Monthly	Click this link to go to the monthly calendar page.
View Other Calendars	Click this link to go to the Other Calendars search page to view calendars of other workers. Depending on how you implement security, a worker may not be able to view the calendars of other workers. It is more typical for managers to use this link to view the calendars of the people that report to them.
Add Calendar Entry	<p>Click this link to access the Task Details page and add calendar entries. For specific information on adding calendar entries refer to the section on Managing Tasks.</p> <p>See Chapter 22, “Working with Tasks,” Managing Tasks, page 326.</p>
Calendar Item Entry	Click this link to go to the page that displays the calendar item. This could be a service order, case, lead, opportunity, or the Task Details page where a user can view and change meeting times, appointments, scheduled phone calls, reminders, and to do items.
Time Zone	<p>Every user can personalize their own time zone setting by clicking the My Personalizations link at the bottom of the menu navigation on the left side of the page. To change the time zone you would then click the Personalize Option button for Regional Settings.</p> <p>You can also set up time zones for workers using the Worker component.</p> <p>To display time zone information, the system first looks to see if the user has personalized their own time zone. It then goes to the Worker component to see if there is time zone information for the worker’s location. If there are no settings for either, the system uses the database time zone.</p>

Pages Used to Set Up Calendars

Page Name	Object Name	Navigation	Usage
Daily Calendar	RB_TSK_CALENDAR	<ul style="list-style-type: none"> Click the Daily Calendar button next to the worker's name on the dispatch board in PeopleSoft FieldService. Click the gray bar that represents a task for a worker on the dispatch board in PeopleSoft FieldService. Click a scheduled task or a day on the Monthly Calendar or Weekly Calendar page. 	View a worker's daily calendar.
Weekly Calendar	RB_TSK_CALENDAR	Click Weekly Calendar link on the Daily Calendar or Monthly Calendar page.	View a worker's weekly calendar.
Monthly Calendar	RB_TSK_CALENDAR	Click Monthly Calendar link on the Daily Calendar or Weekly Calendar page.	View a worker's monthly calendar.

Viewing Daily Calendars

Access the Daily Calendar page.

Daily Calendar of Ben Harris

[Daily](#)
[Weekly](#)
[Monthly](#)
[View Other Calendars](#)

Time Zone **PST**

Go To

15:30 - 16:00	Inventory Owner: Ben Harris
16:00 - 16:30	Status Report Details Owner: Ben Harris

[Daily](#)
[Weekly](#)
[Monthly](#)
[View Other Calendars](#)

Daily Calendar page

Go To

Displays the date for the events appearing on the calendar. To view different days, enter a new date, select a new date using the Choose a date button or use the Next Day and Previous Day arrows.



Click the Choose a date button to access the Daily Calendar page for another date.

See Also

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

PeopleSoft Enterprise Sales 8.9 PeopleBook, “Setting Up Sales Security and Personalization”

Viewing Weekly Calendars

Access the Weekly Calendar page.

Weekly Calendar of Douglas Miller

[Daily](#) [Weekly](#) [Monthly](#) [View Other Calendars](#) Time Zone PST

◀ March 28, 2004 - April 3, 2004 ▶ [Current Week](#) Go To

Sunday March 28, 2004	
Monday March 29, 2004	08:00-17:00 Inventory at Warehouse Owner: Douglas Miller
Tuesday March 30, 2004	
Wednesday March 31, 2004	
Thursday April 1, 2004	
Friday April 2, 2004	
Saturday April 3, 2004	

Weekly Calendar page

Go To

Displays the current date. To display a new calendar enter a new date, select a new date using the Choose a date button or use the Next Week and Previous Week arrows.



Click the Choose a date button to access the calendar page for another date.

Note. You can also click the link under the day of the week to go to the worker's daily calendar for that day.

Viewing Monthly Calendars

Access the Monthly Calendar page.

Monthly Calendar of Douglas Miller

[Daily](#) [Weekly](#) [Monthly](#) [View Other Calendars](#) Time Zone PST

◀ March, 2004 ▶ Go To

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
<u>29</u>	<u>1</u>	<u>2</u>	<u>3</u>	<u>4</u>	<u>5</u>	<u>6</u>
<u>7</u>	<u>8</u>	<u>9</u>	<u>10</u>	<u>11</u>	<u>12</u>	<u>13</u>
<u>14</u>	<u>15</u>	<u>16</u>	<u>17</u>	<u>18</u>	<u>19</u>	<u>20</u>
<u>21</u>	<u>22</u>	<u>23</u>	<u>24</u>	<u>25</u>	<u>26</u>	<u>27</u>
<u>28</u>	<u>29</u> 08:00 Inventory at Warehouse	<u>30</u>	<u>31</u>	<u>1</u>	<u>2</u>	<u>3</u>

Monthly Calendar page

Go To

Displays the month and year for the events appearing on the calendar. Select a new month and year to go to a different calendar for the worker. To access a calendar for a different month, click the Next Month and Previous Month arrows.

Note. You can also click the link under the day of the week to access the worker's daily calendar for that day.

Current Month

Click to return to the calendar for the current month after navigating to other months or years. The system highlights the current day and displays nonwork days in light gray.

See Also

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, "Defining Workers"

Integrating Calendars with Third-Party Applications

PeopleSoft CRM delivers two enterprise integration points (EIPs)—Calendar/Task and Task Type—to integrate the calendar functionality with third-party voice recognition applications.

In addition, you can take advantage of the PeopleSoft Infosync product, which provides end users with the ability to synchronize data between PeopleSoft CRM and PIM applications. PeopleSoft Infosync performs bidirectional synchronization of calendars, contacts and tasks between PeopleSoft CRM and Microsoft Outlook or Lotus Notes with a click of a button.

See the EIP Catalog on the PeopleSoft Customer Connection website for more information.

See Also

PeopleSoft Enterprise Components for CRM 8.9 PeopleBook

PART 4

Interactions and 360-Degree Views

Chapter 16
Working with Interactions

Chapter 17
Setting Up the 360-Degree View

Chapter 18
Using the 360-Degree View

CHAPTER 16

Working with Interactions

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

- Set up interaction status.
- View interactions.

Understanding Interactions

This section discusses:

- Interactions and subinteractions.
- Contact methods and status.
- Interaction creation.
- Interaction display.
- Interaction notes.

Interactions and Subinteractions

Interactions are communications between you and customers or partners. Tracking such communications provides valuable insight into customer-related activities.

Subinteractions are interactions that relate to a specific PeopleSoft CRM transaction, such as a lead, order, or case. Notes that are associated with an interaction are also subinteractions. A single interaction can have zero, one, or many subinteractions.

External Customers Versus Workers

You create different types of subinteractions depending on whether an interaction is for an external customer (or partner) or a worker. In most CRM applications, customers are external to an organization. Any person or organization whose data that you manage in one of the customer or partner components (Company, Partner Company, Person, or Site) is considered an external customer. However, in PeopleSoft HelpDesk and HelpDesk for Human Resources, customers are internal people whose data you manage in the Worker component.

The Worker component enables you to manage data for help desk internal customers and for CRM staff users such as salespeople, call center agents, and field service technicians. A worker can function as either a customer or as CRM staff; therefore, the creation of a worker interaction is context-dependent. Worker interactions are created only from the context of a help desk case, a human resources help desk case, or the Worker 360-Degree View page.

For example, if you open a help-desk case for Mark Anderson, any correspondence that you send to Mark from that case is logged as an interaction, and the case itself becomes a subinteraction. If Mark is also a customer service representative, he might receive notifications that are related to cases for other callers. These notifications are not logged as interactions because, in this context, Mark is a contact, not a customer.

Note. PeopleBooks normally reserves the term *customer* for external customers. However, in this chapter, the term includes partners as well as internal and external customers unless otherwise indicated.

Subinteraction Types

You can create the following PeopleSoft CRM transactions as subinteractions of external customer interactions:

- PeopleSoft Support cases.
- PeopleSoft Sales leads.
- PeopleSoft Sales opportunities.
- All types of PeopleSoft Order Capture (collectively known as *order captures*).
- Installed products.
- PeopleSoft Enterprise FieldService service orders.
- Notes.

You can create the following PeopleSoft CRM transactions as subinteractions of worker interactions:

- PeopleSoft HelpDesk cases.
- PeopleSoft HelpDesk for Human Resources cases.
- Notes.

Note. Additional types of interactions are available in PeopleSoft CRM industry-specific applications.

Contact Methods and Status

Every interaction has an associated *contact method*. An interaction's contact method categorizes the interaction. It indicates the direction (inbound or outbound) of the interaction and the communication channel. Inbound interactions occur when a customer initiates the contact; outbound interactions occur when you initiate the contact. Outbound interactions can be manual (for example, when a salesperson sends correspondence to a customer) or automatic (for example, when workflow notifies a customer that a case is closed).

Many communication channels are used for both inbound and outbound communications. For example, phone, email, and paper correspondence (whether mailed or faxed) can originate internally or externally. However, the customer always initiates web-based interactions. Therefore, the Inbound Chat and Inbound Web (for web self-service) contact methods do not have any outbound counterparts.

The Interaction Detail page contains the contents of the interaction (the text of the email, correspondence, or chat), and the interaction detail type identifies that detail type. For example, the phone interaction detail type is just one type, whereas the contact methods include Phone In and Phone Out. Contact methods include both the channel and the direction of the interaction (in or out), while the interaction detail type is used mainly to control different sets of interaction statuses. There are different sets of interaction statuses for different channels and directions.

Contact Method (INTERACTION_MTHD) and Interaction Detail Type (RB_MCF_DETAIL_TYPE) are translate fields.

Interaction Status

Every interaction has a status, which varies depending on the contact method. This table shows the valid statuses for each contact method.

Contact Method	Statuses
Chat	<i>Accepted, Requested</i> <i>See PeopleSoft Enterprise CRM 8.9 Multichannel Applications PeopleBook, “PeopleSoft ERMS”.</i>
Email out (outbound email), including email replies, ad-hoc email, and email that is sent through a correspondence request.	<i>Cancelled, Completed, Failed In Delivery, and In Progress.</i> <i>See PeopleSoft Enterprise CRM 8.9 Multichannel Applications PeopleBook, “Understanding ERMS”.</i>
Email in (inbound email)	<i>Assigned, Cancelled, Completed, Processing, New, and Reassigned.</i> <i>See PeopleSoft Enterprise CRM 8.9 Multichannel Applications PeopleBook, “Understanding ERMS”.</i>
Phone	<i>Busy, Callback, Child Answered, Completed, In Progress, No Answer, and Do Not Call Again.</i> <i>See Chapter 18, “Using the 360-Degree View,” page 253.</i>
Printer	None.
Self-Service	<i>Completed</i> <i>See Chapter 20, “Working with Customer Self-Service Transactions,” page 275.</i>

An interaction’s initial status depends on how the interaction is created. You can manually update status for interactions that you create using the 360-Degree View feature, but the system maintains status for other types of interactions.

Interaction Creation

You can create interactions manually, or the system can create them automatically. This table lists the situations in which the system creates interactions:

Condition	Subinteraction	Contact Method and Status Management
A user accesses a customer, partner, or worker 360-Degree View.	Created based on the user's actions in the 360-Degree View.	In the 360-Degree View, the user can see the contact method and can change it manually. The multichannel framework type is not user-selectable. In the 360-Degree View, the multichannel framework type is always <i>Phone</i> .
The PeopleSoft CRM Computer Telephony Interface (CTI) application uses a delivered CTI transaction to access a page in the PeopleSoft CRM system. Note. Additional CTI transactions that you create do not automatically create interactions or subinteractions.	Created by the system if the transaction's target page is a subinteraction-enabled object,	Contact method: Phone Status default: <i>In Progress</i>
A user sends email or print correspondence using the PeopleSoft CRM correspondence management features.	The object from which the correspondence was sent.	Contact method: Outbound mail Status default: <i>In Progress</i>
A user sends a manual email to a customer (or, from the context of a help-desk case, to a worker.) User-initiated email can be either an email response (if you use the PeopleSoft email response management system [ERMS]) or an ad-hoc email.	Multiple PeopleSoft CRM transactions can be related to both inbound and outbound email. Each of the related transactions to the outbound email has a subinteraction that the system created.	Contact method: Outbound email Status default: <i>In Progress</i>
The PeopleSoft ERMS processes an inbound email.	Created when a user manually associates related objects to the inbound email. If a newly received email is part of a thread, it automatically inherits its parent email's related objects and subinteractions.	Contact method: Inbound email Status default: <i>New</i>

Condition	Subinteraction	Contact Method and Status Management
<p>The system sends an automated email to a customer, partner, or worker from the context of a help-desk case, to a worker. Automated email is sent by component event processing, by business project workflow, or by the ERMS system autoresponse to structured email.</p> <p>Note. Autoacknowledgement email sent by the ERMS system or in response to a customer's Contact Us submission does not create an interaction.</p>	<p>Component event processing creates an interaction; a business project does not.</p> <p>No subinteractions are created.</p> <p>A subinteraction is created by the ERMS autoresponse process if the subinteraction is associated with transactions.</p>	<p>Contact method: Outbound email</p> <p>Status default: <i>In Progress</i></p>
<p>A self-service customer or partner submits a Contact Us message.</p> <p>The Contact Us page is available only to external customers or partners, not to workers.</p>	<p>The text of the message becomes the interaction note.</p>	<p>Contact method: Phone</p> <p>Status default: <i>In Progress</i></p>
<p>A customer or partner requests a chat session from the self-service Contact Us page.</p>	<p>None.</p>	<p>Contact method: Chat</p> <p>Status: <i>Requested</i></p>
<p>A self-service user creates a new case or updates an existing case in PeopleSoft Support, HelpDesk, or HelpDesk for Human Resources.</p>	<p>The case that was created or updated.</p>	<p>Contact method: Phone</p> <p>Status default: <i>In Progress</i></p>

To record communications that occur outside of the PeopleSoft CRM system, users can manually create interactions using the appropriate 360-Degree View. Users might manually create interactions if:

- A phone call is placed or received without the use of the CTI system.
- A letter or fax is received.
- Email is sent from outside of the PeopleSoft CRM system.
- Email is received by a mailbox that the ERMS system is not monitoring.

Interaction Display

There are various interfaces for viewing interaction information.

Interactions in the 360-Degree View Pages

PeopleSoft CRM provides 360-Degree View pages for customers, partners, and workers. There are two separate 360-Degree View pages for workers: one for PeopleSoft HelpDesk and one for HelpDesk for Human Resources. As delivered, all of the 360-Degree View pages are configured to show interactions in the action tree. In the action tree, expanding an interaction displays all of that interaction's subinteractions.

The 360-Degree View page for an external customer or partner shows all of the interactions for that customer. The 360-Degree View pages for workers filter interactions as follows:

- The PeopleSoft HelpDesk for Human Resources 360-Degree View page shows interactions that have human resources help-desk cases as subinteractions.
- The PeopleSoft HelpDesk 360-Degree View page shows interactions that have (non-human-resources) help-desk cases as subinteractions.
- Both of these worker-oriented 360-Degree View pages show interactions that have no case subinteractions.

Other Interaction Lists

In addition to the 360-Degree View pages, you can view lists of interactions using:

- Interaction history grids within transactional components.

The components that you use to manage subinteraction-enabled components (including Cases, Leads, and Orders) include a grid that shows all interactions for the specific transaction.

- The Interaction List page.

This page enables you to search for and access interactions directly from a menu (rather than from the context of a specific customer, partner, or transaction).

- The Recent Interactions pagelet.

This pagelet displays recent interactions for a selected customer or partner. The Recent Interactions pagelet is available with PeopleSoft CRM Portal Pack.

Interaction Details

From any interaction list, you can drill into the Interaction page, where you can see the details of a specific interaction. The page that appears depends on the interaction type:

- If the interaction was created on the 360-Degree View page, the details appear on the Interaction Detail page.
- If a correspondence request created the interaction, the details appear on the Interactions - View Correspondence page.
- If the interaction is an inbound or outbound email (other than email sent through a correspondence request), drilling into the interaction displays the appropriate email component.
- If the interaction is a chat session, the detail page shows the full chat transcript.

See Also

PeopleSoft Enterprise CRM Portal Pack 8.9 PeopleBook, “Getting Started with PeopleSoft CRM Portal Pack”
[Chapter 18, “Using the 360-Degree View,” page 253](#)

Modifying Interaction Status

This section discusses how to modify interaction status descriptions.

Page Used to Set Up Interaction Status

Page Name	Object Name	Navigation	Usage
Interaction Status	RI_STATUS_SETUP	Set Up CRM, Common Definitions, Correspondence, Interaction Status Setup, Interaction Status	Modify interaction status descriptions.

Modifying Interaction Status Descriptions

Access the Interaction Status page.

Interaction Status					
Interaction Detail Type		Inbound Email			
Interaction Status					
*Status Code	*Status Description	Datetime Added			
ASGN	Assigned	07/17/2002 6:14PM	+	-	
CANC	Cancelled	07/17/2002 6:14PM	+	-	
CMPL	Completed	07/17/2002 6:16PM	+	-	
INPR	Processing	02/08/2004 11:40AM	+	-	
NEW	New	07/17/2002 6:14PM	+	-	
RASN	Reassigned	07/17/2002 6:16PM	+	-	

Interaction Status page

Warning! If you or change interaction statuses, you must make appropriate code changes in PeopleSoft Application Designer.

Status Code Displays the statuses that PeopleSoft CRM delivers for the interaction detail type.

Viewing Interactions

This section discusses how to:

- Search for interactions.
- View interaction details.
- View interaction correspondence details.

Pages Used to View Interactions

Page Name	Object Name	Navigation	Usage
Interaction List	RI_INTERACT_HOME	Customers CRM, Interaction List, Interaction List	Search for interactions.
Interaction	RI_INTERACTION	<ul style="list-style-type: none"> Click the link for an interaction that has no associated contact method on the Interaction List page. Click the link for an interaction that has no associated contact method on any 360-Degree View page. Click the link for an interaction that has no associated contact method on the Recent Interactions pagelet. 	View interaction details, including a list of related subinteractions and the complete text of any interaction note.
Interactions - View Correspondence	RBC_RECPIENT_INQ	<ul style="list-style-type: none"> Click the link for an interaction that represents correspondence on the Interaction List page. Click the link for an interaction that represents correspondence on any 360-Degree View page. Click the link for an interaction that represents correspondence on the Recent Interactions pagelet. 	View interaction details for the correspondence request.
Inbound Email	RB_EM_IB	<ul style="list-style-type: none"> Click the link for an interaction that represents inbound email on the Interaction List page. Click the link for an interaction that represents inbound email on any 360-Degree View page. Click the link for an interaction that represents inbound email on the Recent Interactions pagelet. 	View interaction details of inbound email.

Page Name	Object Name	Navigation	Usage
Outbound Email	RB_EM_OB	<ul style="list-style-type: none"> Click the link for an interaction that represents outbound email on the Interaction List page. Click the link for an interaction that represents outbound email on any 360-Degree View page. Click the link for an interaction that represents outbound email on the Recent Interactions pagelet. 	View interaction details of inbound email.
Chat	RB_CHAT_LOG	<ul style="list-style-type: none"> Click the link for an interaction that represents chat on the Interaction List page. Click the link for an interaction that represents chat on any 360-Degree View page. Click the link for an interaction that represents chat on the Recent Interactions pagelet. 	View interaction details of a chat.

Searching for Interactions

Access the Interaction List page.

Interaction List						
<div> <div>Search</div> </div>						
Business Unit = COM01						
<div> <div>Interactions</div> <div> <div>Customize</div> <div>Find</div> <div>View All</div> <div></div> </div> <div>First 1-10 of 26 Last</div> </div>						
	Name	Type	Contact Method	Interaction Status	Start Date & Time	Comments
	Ted Pepper	Case		In Progress	10/28/2002 11:59AM	Viewed/Updated Case No. 220156
	Ted Pepper	Case		In Progress	10/28/2002 11:59AM	Viewed/Updated Case No. 220065
	Ted Pepper	Case		In Progress	10/28/2002 11:59AM	Viewed/Updated Case No. 220328
	Ted Pepper	Case		Completed	10/28/2002 12:26PM	Added Case No. 220388
	Ted Pepper	Case		In Progress	10/28/2002 1:08PM	Viewed/Updated Case No. 220388
	Ted Pepper	Case		In Progress	10/28/2002 1:08PM	Added Case No. 220065
	Ted Pepper	Order		In Progress	10/28/2002 1:08PM	Viewed/Updated Order 1b37d7a5dfbe11d685d...
	Ted Pepper	Order		Completed	10/28/2002 1:34PM	Viewed/Updated Order 1b37d7a5dfbe11d685d...
	Ted Pepper	Case		Completed	10/28/2002 1:51PM	Viewed/Updated Case No. 220061
	Ted Pepper	Case		Completed	10/28/2002 2:54PM	Viewed/Updated Case No. 220388

Interaction List page

Search

Use this page region to define search criteria and perform searches. You can control the appearance and behavior of the interaction search by using the PeopleSoft CRM search configuration utility.

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

As delivered, the system searches for all interactions when you first access the page. You cannot use this page to add interactions or edit interaction data.

The search criteria fields and the search results fields are the same as the identically-named fields on the interaction detail pages. Not all fields apply to all types of interactions. For example, only interactions that are created from a 360-Degree View page have a value in the Call Back date field.

Type

Select a subinteraction type. The search locates interactions that have the type of subinteraction that you select. Available values depend on which PeopleSoft CRM products you have licensed.

Interactions

This grid displays search results and lists all subinteractions, along with their interactions. Interactions that do not have subinteractions are not listed.



Click the Edit This Interaction button to access the Interaction page and view detailed information about the interaction. A different interaction detail page appears for each type of interaction.

Type

Displays links to associated subinteractions. An interaction can have more than one link. The link text is the subinteraction type—for example, *Case* or *Order*.

Viewing Interaction Details

Access the Interaction page.

Interaction

Customer Information

Contact Jack Pepper

Customer Shoreview Medical

Interaction Information

Contact Method

Interaction Status Completed

Start Date 10/24/02 9:05PM

End Date 10/24/02 9:05PM

Callback Date Time

Related Transactions

Customize | Find | View All |

First 1 of 1 Last

	Type	Start Date & Time	Comments
	Case	10/24/2002 9:05PM	Viewed/Updated Case No. 220334

Modified

10/24/2002 9:05PM PDT

SAMPLE

[Return to Interaction List](#)

Interaction page

Customer Information

Contact Displays the name of the person (company contact, partner contact, consumer, or worker) for whom you created the interaction.

Interaction Information

The fields in this group box are identical to the fields in the Log Interaction group box on the 360-Degree View page.

See [Chapter 18, “Using the 360-Degree View,” page 253](#).

Related Transactions

This grid lists any subinteractions (including notes) that are associated with the interaction.

Note. Your internal business processes determine whether users enter notes in the interaction itself or in another transaction (such as a case or lead) that was the subject of the phone call.

Type Displays the type of subinteraction. Available values depend on which PeopleSoft CRM products you have licensed.

Start Date & Time Displays the date and time that the subinteraction was created.

Comments Displays the full text of the note if the type is *Note*. For other types of related transactions, this field is blank. For other types of related transactions, this field contains comments such as *Added New Case* or *Multi-channel related transaction*.

Other Page Elements

Return to 360-Degree View Click this link to return to the 360-Degree View page. This link appears only if you originally accessed the Interaction page from the 360-Degree View page.

Return to Interaction List Click this link to return to the Interaction List page. This link appears only if you originally accessed the Interaction page from the Interaction List page.

Viewing Correspondence Interaction Details

Access the Interactions - View Correspondence page.

The fields on this page are identical to the similarly-named fields in the Correspondence Request page.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Understanding Correspondence”.

CHAPTER 17

Setting Up the 360-Degree View

This chapter provides an overview of the 360-Degree View and discusses how to:

- Define transactions for use on the 360-Degree View.
- Set up the 360-Degree View tree.
- Configure the 360-Degree View.
- Configure the 360-Degree View Search page.

Understanding the 360-Degree View

This section provides an overview of 360-Degree views in PeopleSoft Customer Relationship Management (PeopleSoft CRM) and discusses:

- 360-degree view integrations.
- 360-degree view search pages.
- 360-degree view system data.
- 360-degree view setup process overview.

See Also

[Chapter 16, “Working with Interactions,” page 213](#)

[Chapter 18, “Using the 360-Degree View,” page 253](#)

360-Degree Views in PeopleSoft CRM

The PeopleSoft CRM 360-Degree View page enables you to manage transactions and interactions for a business object—a customer or contact of customer, site or contact of site, partner or contact of partner, or worker. The 360-degree view provides both an entry point for interactions with the business object and a central point from which to launch transactions, such as quote and order creation, case creation, and opportunity creation.

The 360-Degree views that are available in PeopleSoft CRM are:

- Customer 360-Degree view.
- Partner 360-Degree view.
- Worker 360-Degree view.
- Human Resources Help Desk (HRHD) Worker 360-Degree view.

Role-specific data for a business object appears on the 360-degree view pages. The user can select a different business object role to have a different set of data appear, or search data based on date ranges.

360-Degree View Trees

The 360-degree view pages represent the activities for a customer, partner, or worker in tree format. Trees are built from the highest level of the hierarchy (root node) to the lowest level of the hierarchy. Tree terminology is derived from the idea of a family tree. The root node is the *parent*, and nodes that report to it are its *children*. Nodes that have the same parent are called *siblings*. These terms refer to the relationship between nodes and are not permanent attributes of the nodes themselves. A single node can be a parent, child, and sibling all at the same time.

A tree node in the 360-Degree View tree has three parts: the node icon, the node name, and a node description. The name and description vary depending on the type of interaction. When defining the tree, you can specify an add, view all, and search node for a particular node of the tree.

Interactions

An interaction is the sum of the events that take place when a customer contacts you. It might consist of several subinteractions.

An interaction is created:

- When the user clicks a node that is interaction-enabled in the 360-Degree View tree to view or change the existing transaction.
- When the user performs a transaction that is interaction-enabled by clicking the Go button next to the Go To drop-down field on the 360-Degree View.
- When the user enters comments in the Note text box that appears in the Log Interaction page region and clicks the Save button on the 360-Degree View.
- When the 360-Degree View page appears through computer telephony integration (an interaction is created automatically for the phone conversation).

Subinteractions

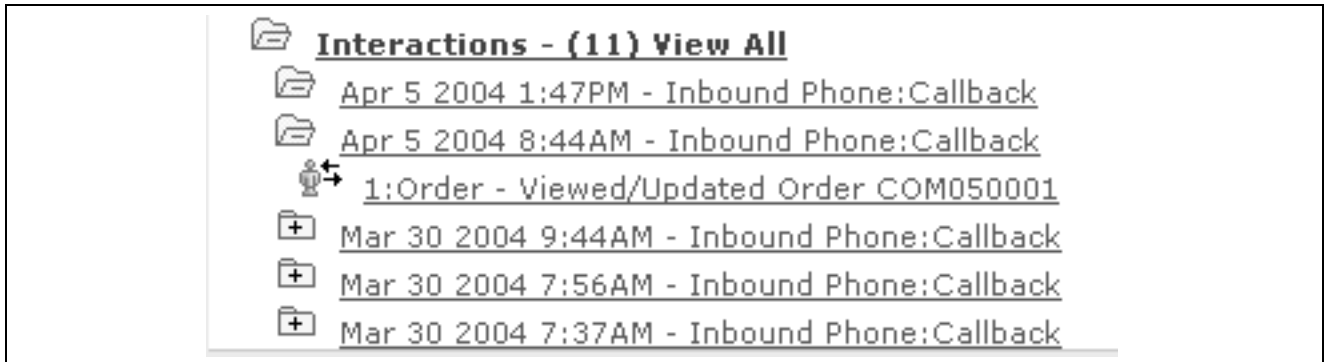
A subinteraction is an event in an interaction.

You can configure the creation of subinteractions to meet business needs. Using the Configure Role page, you can specify whether or not to capture a transaction that you initiate from the 360-degree view as a subinteraction of a node.

An interaction may contain multiple subinteractions. For example, a call with a customer may involve updating a case, adding a service order, and sending a note about the customer. All of these subinteractions are logged under the same interaction.

Interaction Nodes

This diagram shows how interactions and subinteractions are represented in the 360-Degree View tree:



Interaction Node

Dynamic Grids

You can configure a dynamic grid to list important information for the transactions for each activity node.

360-Degree View Integrations

PeopleSoft CRM provides integration through EIPs to PeopleSoft Bill Presentment and Account Management.

When you define tree nodes, you can specify enterprise integration points (EIPs) that return data from other PeopleSoft or third-party systems. This gives you the flexibility to include any type of information in the system and have that information appear in the 360-Degree View tree. EIPs are predefined; use them to request information from PeopleSoft Bill Presentment and Account Management for invoice and payment information that is associated with a customer.

You can click a receivables transaction to view the detail in PeopleSoft Bill Presentment and Account Management.

Note. You must enable single signon before you can transfer from PeopleSoft CRM to PeopleSoft Bill Presentment and Account Management.

See Also

Enterprise PeopleTools 8.45 PeopleBook: Security Administration

PeopleSoft Enterprise CRM 8.9 Industry Application Fundamentals PeopleBook, “Understanding Accounts Receivable and 360 - Degree View Integration”

360-Degree View System Data

PeopleSoft CRM delivers predefined data for the 360-Degree View; including nodes, grid definitions, transactions that are associated with nodes and transaction groups. You can set up 360-degree view trees and pages that use this predefined system data. You set up additional information only if you need to change defaults.

360-Degree View Setup Process

When you install PeopleSoft CRM, most of the necessary information is in place for you to set up the 360-degree view tree. PeopleSoft CRM delivers predefined data for the 360-degree view; including nodes, transactions that are associated with nodes, grid definitions, and transaction groups. You can set up 360-degree view trees and pages that use this predefined system data. You set up additional information only if you need to change defaults.

To examine the predefined data, access the page where you set up that data by following the link that follows each step in the process below and search with no search criteria entered. A list of the predefined data appears for you to browse.

This is the process for setting up the 360-Degree View:

1. Use the Define Transaction Type page to select transactions that you can create on the 360-Degree View.

See [Chapter 17, “Setting Up the 360-Degree View,” Configuring Transactions for the 360-Degree View, page 229.](#)

2. Use the Transaction Group page to select transaction groups that appear on the 360-Degree View, depending on the customer’s role.

When configuring a role for the 360-Degree View, you specify which transaction group should apply to that role.

See [Chapter 17, “Setting Up the 360-Degree View,” Defining Transaction Groups, page 229.](#)

3. Use the Dynamic Grid page to define a dynamic grid that lists important information from the transactions that are associated with each activity node.

See [Chapter 17, “Setting Up the 360-Degree View,” Defining Dynamic Grids, page 247.](#)

4. Use the Define Node page to define tree nodes that you can use to configure the 360-Degree View tree.

When defining nodes, specify the node action and the type of node — placeholder, view, or EIP.

See [Chapter 17, “Setting Up the 360-Degree View,” Defining Nodes, page 232.](#)

5. Use the Set Up Tree page to set up the 360-Degree View tree.

When setting up the tree, you specify the tree structure, the images that appear in the tree, its size on the page, and what transaction should appear for each node on it.

See [Chapter 17, “Setting Up the 360-Degree View,” Setting Up Trees, page 237.](#)

6. Use the Set Up Profile page to set up the Profile group box that appears on the 360-Degree View.

When setting up the profile, you can define the fields and buttons (as well as the buttons’ actions) that appear in the Profile group box.

See [Chapter 17, “Setting Up the 360-Degree View,” Setting Up Profiles, page 241.](#)

7. Use the Configure Role page to configure a PeopleTools role that is used to access the 360-Degree View.

When configuring a role, specify the tree, transaction group, and profile that you want to associate with this role. Plus, you determine whether you want to capture subinteractions for the transactions that are associated with the transaction group and the nodes in the tree.

See [Chapter 17, “Setting Up the 360-Degree View,” Configuring Roles, page 243.](#)

8. (Optional) Use the User Links page to define user links that appear on the search page that accesses the 360-Degree View.

See [Chapter 17, “Setting Up the 360-Degree View,” Defining User Links That Appear On the Search Page, page 249.](#)

9. Use the 360 Degree Search Preferences - 360 Degree View Search Preferences page to specify the search page that you want to use to access the 360-Degree View.

See [Chapter 17, “Setting Up the 360-Degree View,” Selecting the Search Page That Is Used to Access the 360-Degree View, page 251.](#)

Configuring Transactions for the 360-Degree View

To configure transactions for the 360-degree view, use the Define Transaction Type (RB_TD_TRANS_DFN) and Define Transaction Group (RB_TD_TRANS_SETUP) components.

This section provides an overview of transactions in the 360-degree view and discusses how to:
set up transaction groups.

Understanding Transactions

The 360-Degree View page that PeopleSoft delivers enable you to view or perform transactions on behalf of the customer or company. The transactions that you can perform appear in the Go To drop-down box on the upper right corner of the 360-Degree View page.

Transactions that you can perform in the 360-Degree View include case, lead, sales opportunity, sales order or quote, service order, agreement, RMA, product registration, defect, and installed product. You can modify this set of transactions by using PeopleSoft CRM setup pages.

Pages Used to Configure Transactions for the 360-Degree View

Page Name	Object Name	Navigation	Usage
Transaction Group	RB_TD_TRANS_SETUP	Set Up CRM, Common Definitions, 360-Degree View, Define Transaction Group, Transaction Group	Set up transaction groups that can appear in the 360-Degree View.
Define Transaction Type - Define Transaction Type	RB_TD_TRANS_DEFN	Set Up CRM, Common Definitions, 360-Degree View, Define Transaction Type, Define Transaction Type	Define 360-Degree View transaction types.
Define Transaction Type - Related Transaction Groups	RB_TD_TRANS_GRP	Set Up CRM, Common Definitions, 360-Degree View, Define Transaction Type, Related Transaction Groups	View all of the transaction groups that are associated with a transaction type.
Copy Transaction Group As	RB_TD_TRANS_CLONE	Set Up CRM, Common Definitions, 360-Degree View, Copy Transaction Group	Clone an existing transaction group. Cloning an existing transaction group makes a copy of it.

Defining Transaction Groups

Access the Transaction Group page.

Transaction Group

Transaction Group

Transaction Name Core **Description** Core Transactions

Maintain Transactions Find | View All First 1 of 13 Last

***Transaction Type** Add Agreement **SubInteraction** + -

***Status** Active

Transfer Type

☒ **Transfer**

Transfer Mode Update/Display **Navigation** AGRMNTADD

Market GBL ☐ **Open in New Window**

☐ **Portal Content Reference**

Portal Name **Portal Obj Name**

☐ **Application Class**

Class ID [Package Tree Viewer](#)

Class Path Like **Method Name**

Transaction Group page

Transaction Name(transaction group name)

The transaction group is the set of transactions that is available in the 360-Degree View.

Maintain Transactions

Transaction Type

Select a transaction type from those that are defined on the Define Transaction Type component.

SubInteraction

Select a subinteraction that corresponds to the transaction type.

Status

Select the transaction group's status — *Active* or *Inactive*. Only transaction groups that are *active* appear on the 360-Degree View.

Transfer Type

For each transaction that you define, specify the transfer type for the transaction.

Transfer

Select to transfer to another PeopleSoft CRM component and page. If you select Transfer, use the Component Navigation and Component Market fields to select the transaction to transfer to.

See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, "Defining Control Values for Business Objects," Defining Component Transfer Navigation.

Transfer Mode

Select the mode in which to open this page for the transaction. Values are *Add*, *Correction*, and *Update/Display*.

Open in New Window	Select to have the transaction launch a new browser window for the transaction when it is initiated.
Portal Content Reference	Select to transfer to a PeopleSoft CRM portal page that you define. If you select Portal Content Reference, use the Portal Name and Portal Object Name fields to select the destination portal page.
Application Class	Select to launch an application class that controls the transfer. You can click the Package Tree Viewer link to search for application classes.

See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, “Defining Control Values for Business Objects,” Defining Component Transfer Navigation.

Setting Up the 360-Degree View Tree

To set up the 360-Degree View Tree, use the Define Node (RB_TD_NODE), Set Up Tree (RB_TD_TREE_DEFN), and Define Dynamic Grid (RB_TD_DYNGRD) components.

This section lists prerequisites and discusses how to set up the 360-Degree View tree.

Prerequisites

You must first define transactions for use on the 360-Degree View tree.

See Chapter 17, “Setting Up the 360-Degree View,” Configuring Transactions for the 360-Degree View, page 229.

Pages Used to Set Up the 360-Degree View Tree

Page Name	Object Name	Navigation	Usage
Define Node	RB_TD_NODE	Set Up CRM, Common Definitions, 360-Degree View, Define Node, Define Node	Define nodes that you can use to configure the 360-Degree View Tree.
Dynamic Grid	RB_TD_DYNGRD_PG	Set Up CRM, Common Definitions, 360-Degree View, Define Dynamic Grid, Dynamic Grid	Define nodes that you can use to configure the 360-Degree View Tree.
Application Packages Lookup	RB_APPLPKG_PG1	Click the Package Tree Viewer link on the Define Node page.	Search for and view the available application packages or classes that PeopleSoft CRM provides.
Set Up Tree	RB_TD_TREE_DEFN	Set Up CRM, Common Definitions, 360-Degree View, Set Up Tree, Set Up Tree	Define the tree configuration (images that appear in the tree, image size, page size, and date filter).
Tree Node	RD_TD_TREE_NDE	Set Up CRM, Common Definitions, 360-Degree View, Set Up Tree, Tree Node	Define the parent and child relationship of the tree nodes.
Test Your Tree	RB_TD_TREE_TEST	Set Up CRM, Common Definitions, 360-Degree View, Set Up Tree, Test Your Tree	Test the 360-Degree View tree to ensure that you configured it correctly.
Copy Tree As	RB_TD_TREE_CLONE	Set Up CRM, Common Definitions, 360-Degree View, Copy Tree, Copy Tree As	Copy an existing tree.

Defining Nodes

Access the Define Node page.

Define Node

***Description** ☐ **Root Node**

SubInteraction **Node** ORDER_89

▼ **Node Action**

☐ **Transfer**

Navigation

Action Mode

Market

☐ **Portal Content Reference**

Portal Name

Portal Obj Name

☐ **Application Class**

Class ID

Class Path

Method Name

☒ **Dynamic Grid**

Grid ID

☐ **None**

Define Node page (1 of 3)

▼ **Node Type**

☐ **Placeholder**

Placeholder Type

☐ **View**

***View Name**

Key Field 1

Key Field 2

Fields to Display Customize | Find | View All |

First 1 of 1 Last

Sequence	*Field Name	Display	Display In	Display Length	Display Value		
1	<input type="text"/>	<input checked="" type="checkbox"/>	First	10	<input type="text"/>		

Define Node page (2 of 3)

EIP - (Synchronous)
Class for Request Message

Class ID Package Tree Viewer

Class Path Method Name

Request Message

*Response Message

Key Field 1

Key Field 2

Fields to Display Customize | Find | View All | First 1 of 1 Last

Sequence	*Field Name	Display	Order By	Order Sequence	Display In	Display Length		
1	<input type="text"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Ascending	First	10		

PeopleCode
Package Tree Viewer

Class ID Package Tree Viewer

Class Path Like Method Name

*Record Name

Key Field 1 Number

Key Field 2 Character

Fields to Display Customize | Find | View All | First 1-2 of 2 Last

Sequence	*Field Name	Display	Display In	Display Length	Display Value		
1	DESCR50	<input checked="" type="checkbox"/>	First	20	Value		
2	RB_TD_COUNT	<input checked="" type="checkbox"/>	Second	10	Value		

Define Node page (3 of 3)

SubInteraction

Select a subinteraction that corresponds to the transaction that is associated with the tree node.

Root Node

Select if the node that you are defining is the root node.

Node Action

For each tree node, specify the node action. Node actions are:

Transfer

Transfers you to a PeopleSoft CRM component and page that you define.

If you select Transfer, use the Component Navigation, Component Market, and Action Mode fields to select where you want the transaction to transfer.

Define the transfer fields using the Component Navigation component.

See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, “Defining Control Values for Business Objects,” Defining Component Transfer Navigation.

Action Mode	Select the mode in which to open this page for the transaction. Values are <i>Add</i> , <i>Correction</i> , <i>Update</i> , and <i>Update/Display All</i> .
Portal Content Reference	Select to transfer to a PeopleSoft CRM portal page that you define. If you select Portal Content Reference, use the Portal Name and Portal Object Name fields to select the portal page to which you want to transfer.
Application Class	Select to call a PeopleSoft CRM application class. If you select Application Class, use the Class ID, Class Path, and Method Name fields to enter the application class that you want the system to call.
Package Tree Viewer	Click to search for and view the available application packages that PeopleSoft CRM provides. When you click this link, the Application Packages Lookup page appears. The information that you select on this page appears on the Define Node page after you click OK.
Dynamic Grid	Click to associate a dynamic grid to the node. See Chapter 17, “Setting Up the 360-Degree View,” Defining Dynamic Grids, page 247 .
None	Indicates that no action is associated with the node.

Node Type

The fields in this region enable you to define the node type.

Placeholder and Placeholder Type	<p>Select to indicate that this node is represented as a placeholder on the 360-Degree View tree.</p> <p>Specify the placeholder type. Values are:</p> <ul style="list-style-type: none"> • Add Node Select to have the tree node represent an add node. • Folder Select to indicate that the tree node is a placeholder that is represented by a folder. • Search Node Select to have the tree node represent a search node. • View All Select to have the tree node represent a view all node. This applies only to the dynamic grid action on the node.
View	Select to define the information that appears in this node.
View Name	Enter the view name that is associated with this node.
Key Field 1 and Key Field 2	Enter key fields for the view.

Note. These fields must appear as the first part of the key structure: RB_TD_360_SBR. Additionally, the view should include the RB_TD_360P_SBR and RB_AUDIT_SBR subrecords in any order.

Fields to Display	<p>Indicate the fields that appear and the order in which the fields appear.</p> <p>When appearing under the node of the 360-Degree View tree, view information is divided into two sections. The first section can contain 20 characters, and the second can contain 30 characters. Specify which fields you want to appear in which sections, and in what order. Also, you can specify how the information is sorted.</p> <p>The two sections are separated by a hyphen. If two or more fields appear in one section, those field values are separated by a colon. For example, under an Orders node, you might see this information coming from a view: 2002-09-20 - Pending:d0e5061fcc. In this case, the capture date is defined for the first section, and the status code and capture ID is defined for the second section.</p>
Sequence	Enter a number in sequence. This number defines the order in which the fields appear in the different sections for the node.
Display	Select to have this field appear for the node on the customer 360-Degree View tree.
Order By	Select for the fields by which you want to sort the information. Then use the Order Sequence field to select how you want to sort the information. Values are <i>Ascending</i> and <i>Descending</i> .
Display In	Select in which section this field appears. Values are <i>First</i> , <i>Second</i> , and <i>No Display</i> .
Display Length	Enter the length of the field.
Display Value	<p>Select the value that appears for this field. Values are: <i>Long Translate</i>, <i>Related Display</i>, <i>Short Translate</i>, and <i>Value</i>.</p> <p>If you select <i>Related Display</i>, use the Use SetID, Record Name, and Column Name fields on the Related Field Details tab to select the related field details. One of the fields of the record entered should include the selected field in the node view. If the value selected is based on setID, the node view should have a key field 2 of <i>SETID</i> or <i>BUSINESS_UNIT</i>.</p>
EIP - (Synchronous)	<p>Select to indicate that the information that appears in this node is gathered from a PeopleSoft EIP.</p> <p>If you select this option, you must specify the EIP information and define how the information is to appear on the 360-Degree View tree.</p>
Class ID, Class Path, and Method Name	Enter the application class information for this EIP.
Request Message	Enter the application request message for this EIP.
Response Message, Key Field 1, and Key Field 2	Enter the response application message for the EIP and its keys.
PeopleCode	<p>Select to indicate that the information that appears in this node is gathered from executing PeopleCode</p> <p>If you select this option, you must specify the application class ID and method name.</p>
Class ID, Class Path, and Method Name	Enter the application class information for the PeopleCode class.

Record Name Enter the record name that contains the data.

Key Field 1 and Key Field 2 Enter the key fields for the record name.

The Fields to Display group box for EIPs and PeopleCode is the same as the Fields to Display group box for Views. Use the fields in this group box to control how the information appears under the node of the 360-Degree View tree that is associated with an EIP.

Setting Up Trees

Access the Set Up Tree page.

Set Up Tree **Tree Node** **Test Your Tree**

Tree Name CORETREE_89 ***Market** Global

***Description** Core Tree ☒ **Default Tree** ☐ **Mobile**

Tree Configuration

Expanded Image PS_TREE_EXPANDED **Leaf Image Name** PS_TREE_LEAF

End Node Image PS_TREE_END_NODE **Collapsed Image** PS_TREE_COLLAPSED

Image Height 16 **Image Width** 16

Page Size 50 **Display Levels** 12

Date Filter 6 - Last Year **Max. Date Filter**

Filter Dates By Creation Date ***Callback Interaction** Do not set status to com

Audit History

Created	Modified	By
07/09/2002 6:01PM PDT		CVP1
	02/06/2004 6:52PM PST	FSIADMIN FSI Administrator

* Required Field

Set Up Tree page

Market Select the market that uses this tree.

Default Tree Select to set this tree as the default tree that appears for this market on the 360-Degree View.

Mobile Select if the mobile 360-Degree View is going to use this tree.

When you select this check box, several of the fields on the page no longer apply because the PeopleSoft CRM Mobile application 360-Degree View has less capability than the 360-Degree View. For instance, mobile doesn't use images and has a limited page size.

Tree Configuration

Expanded Image, Leaf Image Name, End Node Image, and Collapsed Image

Enter the images that appear on the tree. The image appears in the Image Preview half of the group box. Leaf Image is used as a default leaf image of the node.

Image Height, Indent Pixels, and Image Width

Enter the size of the image that appears on the tree. The default size is 16 by 16.

Display Levels

Enter the number of levels up to which the 360-Degree View tree is configurable.

Page Size

Enter the page size for the 360-Degree View tree. This is the size of the HTML area where the 360-Degree View tree appears on the 360-Degree View.

Date Filter

Select the filter for the tree. Values are:

- 1 - Today
- 2 - Yesterday
- 3 - Last Week
- 4 - Last 2 Weeks
- 5 - Last Month
- 6 - Last Year
- 7 - View All

Note. All date filters include the values for today. For example, select 2 - Yesterday to show information that is related to today and yesterday.

Max. Date Filter

Select the maximum date filter, which is used as a restriction against the date field that the user actually enters.

The system always looks at this filter when determining the information that appears on the 360-Degree View tree, regardless of what the user specifies in their date personalization settings.

If this filter is not set, and if you select View All in the date personalization on the 360-Degree View, and if you select Enable Filtering on Date Range, then the system populates the start date with 01/01/1900 on the 360-Degree View.

Creation Date

Select to filter dates by the entity's creation date.

Last Modified Date

Select to filter dates the entity's last modification date.

Callback Interaction

Select how the system should set the status of an interaction when a user clicks the Finish Interaction button. Values are *Set Status to Complete* and *Do not Set Status to Complete*

Setting Up Nodes

Access the Tree Node page.

Tree Node page

Tree Node	Select the child node for the 360-Degree View tree.
Parent Node	Select the parent node under which this child node appears in the 360-Degree View tree.
Status	Select the tree node's status — <i>Active</i> or <i>Inactive</i> . Only Active nodes appear on the tree.
Sequence	Enter the order in which the child nodes appear on the tree. The sequencing is from low to high.
Node Parameters	
Display and Fetch	Enter the maximum number of rows that appear under the expanded node in the 360-Degree View. Then enter the maximum number of rows to fetch, or retrieve, from the database when the user clicks <i>View All</i> on the tree node.
Note. If you leave this field blank, the system retrieves 1000 rows.	
Folder or Leaf	Select whether you want the node to appear as a folder or a leaf.
Leaf Image	Select the image for the leaf. The image appears next to the field. If you leave this field blank, the system uses the default tree leaf image.
Expand	Select to expand the nodes on the tree when the tree initially appears on the 360-Degree View.
Hide Node if No Children	Select to hide the node if there are no values. For example, if the customer has no cases, the Case node does not appear on the tree.
Apply Date Filter	Select to apply a date range to the activities for the given node. This is selected by default. If cleared, date range criteria does not apply to that node.

Testing Trees

Access the Test Your Tree page.

Test Your Tree page

To test a tree:

1. Enter data into one or more of the fields in the Test Tree page region.
2. Click the Test Tree button.

The system verifies the tree configuration and a preview of the tree appears in the Activities group box.

Searching for and Viewing Application Packages

Access the Application Packages Lookup page.

Application Packages Lookup page

Click any tree node to select the application class, then click OK. The system returns the information to the page from which you transferred.

Filters For Lookup

Select either App Class or App Package in the Search By field and enter either an application class ID or application class path.

Application Class Tree

The tree for the application class appears in this portion of the page.

See Also

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

Configuring the 360-Degree View

To configure the 360-Degree View, use the Set Up Profile (RB_TD_PROF_SET) and Configure Role (RB_TD_ROLE_TREE) components.

This section discusses how to configure the 360-Degree View.

Pages Used to Configure the 360-Degree View

Page Name	Object Name	Navigation	Usage
Set Up Profile	RB_TD_PROF_SETUP	Set Up CRM, Common Definitions, 360-Degree View, Set Up Profile	Define a profile that appears on the 360-Degree View.
Configure Role	RB_TD_ROLE_TREE	Set Up CRM, Common Definitions, 360-Degree View, Configure Role, Configure Role	Configure tree information for a role.
Transaction Sub-Interactions	RB_TD_SUB_TRANS	Set Up CRM, Common Definitions, 360-Degree View, Configure Role, Transaction Sub-Interactions	Define the transactions for which to capture subinteractions.
Node Sub-Interactions	RB_TD_SUB_NODE	Set Up CRM, Common Definitions, 360-Degree View, Configure Role, Node Sub-Interactions	Define the nodes for which to capture subinteractions.
Dynamic Grid	RB_TD_DYNGRD_PG	Set Up CRM, Common Definitions, 360-Degree View, Define Dynamic Grid, Dynamic Grid	Define the grid on which transaction information appears.

Setting Up Profiles

Access the Set Up Profile page.

Set Up Profile

*Description	Core Profile	*Column Layout	2
Profile Type	Customer Profile		

Application Class Path

*Class	TDProfile	Package Tree Viewer
*Class Path	RB_TD_360	

Description

Market	Global	<input checked="" type="checkbox"/> Default
---------------	--------	--

Set Up Profile page (1 of 2)

Profile Fields to Display

Find | View All First 1 of 6 Last

Description

Record	RD_PERSON_NAME	*Display Column	First Column
Field Name	BO_NAME_DISPLAY	Label ID	NAME
Label Type	Long Name	Description	Name

First Button Details

Class ID	TDProfile	Package Tree Viewer
Class Path	RB_TD_360	
Method Name	GoToContact	
Image Name	PT_POPUP	Image
<input checked="" type="checkbox"/> Display Image		

Second Button Details

Class ID		Package Tree Viewer
Class Path		
Method Name		
Image Name		Image
<input type="checkbox"/> Display Image		

Set Up Profile page (2 of 2)

Profile Type

Select *Customer Profile*, *Financial Profile*, or *Other*. This field controls the information that is available for inclusion in profile data.

Column Layout

Select the column layout for profile display.

Application Class Path

Package Tree Viewer

Click to search for and view all of the application packages that PeopleSoft CRM provides.

See [Chapter 17, “Setting Up the 360-Degree View,” Searching for and Viewing Application Packages, page 240.](#)

Description

Market

Select the market for this profile.

Default

Select to set this profile as the default profile for this market.

Profile Fields to Display

Record and Field Name

Enter the record and field name that you want to appear in the 360-Degree View Profile group box.

Label ID

Enter the label ID for this field in the Profile group box.

Long/Short Name

Select whether you want the *Long Name* or *Short Name* to appear for this field in the Profile group box.

Display Column

Select the column in which the field appears, for two column layouts only.

First button details and Second Button details

Use the fields in this screen region to define the buttons in the 360-Degree View Profile group box.

Class ID, Class Path, Method Name, and Image

Enter information to locate and identify the method that executes when a user clicks the first or second button in the 360-Degree View row.

Configuring Roles

Access the Configure Role page.

Configure Role page

Configure Role Fields

Role Name	Enter the PeopleTools role.
Transaction Group Name	Enter the transaction group that you want to associate with this PeopleTools role. See Chapter 17, “Setting Up the 360-Degree View,” Defining Transaction Groups, page 229.
Default Grid ID	Enter the ID of the dynamic grid that appears when the user first accesses the 360-Degree View page. See Chapter 17, “Setting Up the 360-Degree View,” Defining Dynamic Grids, page 247.
Tree Name	Enter the tree that you want to associate with this PeopleTools role. See Chapter 17, “Setting Up the 360-Degree View,” Setting Up Trees, page 237.
Label Change Template	Enter the label change template that you want to associate with this PeopleTools role. See <i>PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook</i> , “Configuring Field Values”.
Profile	Enter the profile that you want to associate with this PeopleTools role. These profiles are available as system data: <ul style="list-style-type: none"> • COMPR (Communications Profile). • CORE (Core Profile). • ENGPR (Energy Profile). • FSIPR (FSI Profile).

- INSPR (Insurance Profile).
- HRHD (HR Help Desk Profile).
- WRKER (Worker profile).

See [Chapter 17, “Setting Up the 360-Degree View,” Setting Up Profiles, page 241](#).

Sequence Number

Enter a number that the system uses to determine which role information appears by default on the 360-Degree View when the user has more than one role in the system.

For example, if a user has the PeopleSoft User role with sequence number 20 and the Support Manager role with sequence number 10, then the information that is related to the Support Manager role is used to initially populate the 360-Degree View because it has the lowest sequence number.

The user can change the role that appears.

See [Chapter 17, “Setting Up the 360-Degree View,” Configuring Roles, page 243](#).

View Type

Select the type of view for this role. Values are:

- *Customer*
- *Partner*
- *HR HelpDesk Worker*
- *Worker*

The system uses the view type to determine the role and related information that appears in the 360-Degree View. If the view type has any of the above values, the system selects only the role with the specified view type having the lowest sequence number.

For example, a user has the PeopleSoft User (sequence number 10, view type of Customer), HR HelpDesk Agent (sequence number 20, view type of HR HelpDesk Worker), Support Admin (support administration; sequence number 25, view type of Customer), and IT HelpDesk Agent (sequence number 30, view type of Worker) roles. When launching the 360-Degree View from Case, if the view type is *Worker*, then the system selects the IT HelpDesk Agent role and shows the Helpdesk tree with Helpdesk Profile information. If the view type is *Customer*, the system selects the PeopleSoft User role because it has a sequence number less than that of the Support Admin role.

Defining Transactions with Subinteractions

Access the Transaction Sub-Interactions page.

The screenshot shows the 'Transaction Sub-Interactions' tab in the configuration tool. At the top, there are three tabs: 'Configure Role', 'Transaction Sub-Interactions' (selected), and 'Node Sub-Interactions'. Below the tabs, the 'Role Name' is 'PeopleSoft User' and the 'Transaction Name' is 'Core'. The main section is titled 'Capture Sub-Interactions for'. It contains a table with columns: 'Transactions', 'Find', 'View All', 'First', '1-5 of 8', 'Last', and 'Capture Sub-Interaction'. The table lists five transactions: 'Add Service Order', 'Add Case', 'Add Installed Product', 'Add Lead', and 'Add Opportunity'. Each transaction has a search icon, a checked box in the 'Capture Sub-Interaction' column, and '+' and '-' buttons.

Transactions	Find	View All	First	1-5 of 8	Last	Capture Sub-Interaction
*Transaction						
Add Service Order	🔍					<input checked="" type="checkbox"/>
Add Case	🔍					<input checked="" type="checkbox"/>
Add Installed Product	🔍					<input checked="" type="checkbox"/>
Add Lead	🔍					<input checked="" type="checkbox"/>
Add Opportunity	🔍					<input checked="" type="checkbox"/>

Transaction Sub-Interactions page

When you access this page, all transactions that are associated with the transaction group appear.

Capture Sub Interaction Select to enable the corresponding transaction to capture subinteractions for this role.

Defining Nodes to Capture Subinteractions For

Access the Node Sub-Interactions page.

The screenshot shows the 'Node Sub-Interactions' tab in the configuration tool. At the top, there are three tabs: 'Configure Role', 'Transaction Sub-Interactions', and 'Node Sub-Interactions' (selected). Below the tabs, the 'Role Name' is 'PeopleSoft User' and the 'Tree Name' is 'CORETREE_89'. The main section is titled 'Capture Sub-Interactions for'. It contains a table with columns: 'Nodes', 'Customize', 'Find', 'View All', 'First', '1-5 of 25', 'Last', and 'Capture Sub-Interaction'. The table lists five nodes: 'Add Case', 'Cases', 'Installed Products', 'Add Product', and 'View All'. Each node has a search icon, a checked box in the 'Capture Sub-Interaction' column, and '+' and '-' buttons.

Nodes	Customize	Find	View All	First	1-5 of 25	Last	Capture Sub-Interaction
*Tree Node Description							
Add Case	🔍						<input checked="" type="checkbox"/>
Cases	🔍						<input checked="" type="checkbox"/>
Installed Products	🔍						<input checked="" type="checkbox"/>
Add Product	🔍						<input checked="" type="checkbox"/>
View All	🔍						<input checked="" type="checkbox"/>

Node Sub-Interactions page

When you access this page, all tree node descriptions that are associated with the tree appear.

Capture Sub Interaction Select to enable the corresponding tree node to capture subinteractions.

Defining Dynamic Grids

Access the Dynamic Grid page.

Dynamic Grid

Grid Definition

Grid ID

ORDER_89

Description

Order grid

Retrieval Type

View

View Name

RI_ORD_STAT_VW

Application Class

Record Name

Class

Class Path

Method

Grid Information

Name

CAPTURE_ID

Label ID

ORDER

Label Type

Short Name

*Visible Columns

3

Description

Order

Grid Keys

Find | View All

First 1 of 2 Last

*Field Name

BUSINESS_UNIT

Sequence number

1

Grid Field

Find | View All

First 1 of 3 Last

*Field Name

CAPTURE_DATE

Label ID

ORDER_DATE

Display Type

Others

Label Type

Long Name

Sequence number

3

Description

Order Date

Dynamic Grid page

Retrieval Type

Specify either the database view or the application class that is the source of the data that populates the dynamic grid.

- | | |
|----------------------------|---|
| View | Select to indicate that the data source is a database view. |
| View Name | Enter the name of the database view that holds data that is returned by the application class method |
| Application Class | Select to indicate that an application class runs to provide the data that appears on the dynamic grid. |
| Record Name | Enter the name of the record that holds data that is returned by the application class method |
| Package Tree Viewer | Click to locate an application class. |

Grid Information

Enter data that names the grid and describes its appearance.

Grid Keys

Field Name	Enter the name of the field that the system uses as a key when transferring to another component.
Sequence number	Enter the sequence of the key.

Grid Field

Enter information that describes each field that appears in the grid.

Configuring the 360-Degree View Search Page

To configure the 360-degree view search page, use the User Links (RB_TD_ANON_LINKS_GBL) and 360-Degree Search Preferences (RB_TD_USRSRCHPREF) components.

This section provides an overview and discusses how to:

- Define user links that appear on the search page.
- Select the search page that is used to access the 360-Degree View.

Understanding 360-Degree View Search Pages

360-Degree View search pages use the customer identification framework to identify the customer or worker whose information appears on the 360-Degree View. Different 360-Degree View search pages are defined for each of the PeopleSoft CRM Industry Solutions, or markets. You can control which search page a user accesses by setting the user's market preferences.

Additionally, you can create user links (which you click to access a component) that appear on these search pages.

See Also

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, “Using Business Object Search and Quick Create Functionality,” Customer Identification

Chapter 18, “Using the 360-Degree View,” Accessing the 360-Degree View, page 256

Pages Used to Configure the 360-Degree Search Page

Page Name	Object Name	Navigation	Usage
User Links	RB_TD_ANON_LINK_PG	Set Up CRM, Product Related, 360-Degree View, User Links	Define user links that appear on the 360-Degree Search page.
Application Packages Lookup	RB_APPLPKG_PG1	Click the Package Tree Viewer link on the User Links page.	Search for and view the available application packages or classes that PeopleSoft CRM provides.
Search Preferences	RB_TD_USRSRCHPREF	Set Up CRM, Product Related, 360-Degree View, 360-Degree Search Preferences	Select the search page that you use to access the 360-Degree View.

Defining User Links That Appear On the Search Page

Access the User Links page.

User Links

Base Market

Global

Component Name

RB_TD_360_SRCH

Page Name

RB_TD_AGT_SRCH_FSI

Description

User Links for CRM for Financial Service

User Links page (1 of 2)

User Links

Find | View All

First 1 of 2 Last

*Sequence1

*StatusActive

+ -

*Link NameSearch Cases

Transfer

Market

Menu Name

Menu Bar Name

Item Name

Page Name

Panel Item Name

ModeUpdate

Application Class

Class

Class Path Like

Method Name

Portal Content Reference

Portal NameEMPLOYEE

Portal Object NameCR_RC_CASE_SEARCH_FSI

Package Tree Viewer

User Links page (2 of 2)

Note. Currently, PeopleSoft CRM provides predefined user links for the search pages in the government and financial industries.

Base Market	The base market where this user link applies.
Component Name and Page Name	The component and page where this set of user links appears.
Description	The description for this set of user links.
User Links	
Define each user link that appears on the search page.	
Sequence	Enter a number that the system uses to determine the order in which the user links appear on the page.
Active	Select the status of the user link— <i>Active</i> or <i>Inactive</i> . Only active user links active appear on the page.
Link Name	Enter the link name. This appears on the page as the user link.

For each user link that you define, select the option that defines the action taken when the user clicks the link. Actions are:

Transfer

Select to have the user link transfer to a PeopleSoft CRM component and page that you define.

If you select Transfer, use the Market, Menu Name, Menu Bar Name, Item Name (component name), Page Name, and Mode fields to select where you want the user link to take you.

Application Class

Select to have the user link calls a PeopleSoft CRM application class.

If you select Application Class, enter the Class, Class Path, and Method Name fields to define the application class that the system to call.

Package Tree Viewer

Click to access the Application Packages Lookup page to search for and view the available application packages that PeopleSoft CRM provides. The information that you select on this page appears on the User Links page after you click OK.

See [Chapter 17, “Setting Up the 360-Degree View,” Searching for and Viewing Application Packages, page 240.](#)

Portal Content Reference

Select to have the user link transfer to a PeopleSoft CRM portal page that you define.

If you select Portal Content Reference, use the Portal Name and Portal Object Name fields to select the portal page to which you want to transfer.

Selecting the Search Page That Is Used to Access the 360-Degree View

Access the Search Preferences page.

Search Preferences			
*User's Preferred Market	Default	Component Name	*Page Name
Communications	<input type="checkbox"/>	RB_TD_360_SRCH	RB_TD_AGT_SRCH_COM
Energy	<input type="checkbox"/>	RB_TD_360_SRCH	RB_TD_AGT_SRCH_ENG
Financial Services	<input type="checkbox"/>	RB_TD_360_SRCH	RB_TD_AGT_SRCH_FSI
Global	<input checked="" type="checkbox"/>	RB_TD_360_SRCH	RB_TD_AGT_SRCH_GBL
Government	<input type="checkbox"/>	RB_TD_360_SRCH	RB_TD_AGT_SRCH_GOV
Insurance	<input type="checkbox"/>	RB_TD_360_SRCH	RB_TD_AGT_SRCH_INS

Search Preferences page

Select the default search page that you want to use to access the 360-Degree View for the different markets. You can define a different search page to access the 360-Degree View for each .

The system checks the user's preferences to determine the market that is associated with that user and then uses the search preferences that you define on this page to determine the search page that appears when users access the 360-Degree View. If you do not define a market value for the user on the user preferences page, the system uses the search page that is associated with the Global market from this page.

Note. The search preference defaults to the search page that is associated with the Global market.

User's Preferred Market Select a preferred market if it is not already shown on the page.

Default Select to indicate that the page in the selected row appears by default when no market preference exists for the user.

CHAPTER 18

Using the 360-Degree View

This chapter provides an overview of 360-degree views and discusses how to:

- Access the 360-Degree View pages.
- Manage overall activity for a business object.

Understanding the 360-Degree View

This section discusses:

- 360-degree views.
- 360-degree view toolbar.

360-Degree Views

360-degree views provide a summary view of overall activity for an business object—a customer, contact, partner, or worker. From a 360-degree view, you can review or initiate transactions, record interactions and subinteractions, view relationships, and view tasks for the business object.

A 360-degree view page includes these page regions:

Region	Details
Role	<p>This drop-down field lists all the roles that are associated with the business object whose information appears on the page. You can select a role to filter transactions so that only the transactions and activities that pertain to that role appear. The system uses this field to generate summary information for the role.</p> <p>See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i>, “Understanding Business Object Relationship Model Components”.</p>
Go To	<p>This field lists the transactions that are defined for the 360-Degree view page. Select the transaction to perform to transfer to that transaction page. The system populates relevant fields on the transaction page.</p> <p>See Chapter 17, “Setting Up the 360-Degree View,” Configuring Transactions for the 360-Degree View, page 229.</p>

Region	Details
Summary	Information such as name, contact information, and customer value appears here. The Summary page region can include up to two buttons that transfer to components that contain more information about the business object.
Activities	<p>Activities appear in a tree format that contains a record of all transactions, interactions, and subinteractions that involve the business object. Transactions are grouped under nodes. You select a node to view, add, modify, or search for a transaction.</p> <p>The specific nodes that appear on the Activities tree vary depending on the business object and role that you select.</p> <p>See Chapter 17, “Setting Up the 360-Degree View,” Setting Up the 360-Degree View Tree, page 231.</p>
Date Filter	This field enables you to select a date range that controls which transactions appear in the tree.
<activity> Detail	<p>The information that appears in this area changes depending on which node you select in the activities tree. Summary information about the transactions that are under the node that you select in the 360-Degree view tree appears in this grid.</p> <p>When you first access the 360-degree view page, the information that appears is controlled by the default setting that is specified for the page.</p> <p>See Chapter 17, “Setting Up the 360-Degree View,” Setting Up the 360-Degree View Tree, page 231.</p>
Log Interaction	<p>Using this group box, you can capture interaction details, record the callback date and time, attach notes to the interaction, and send an email to the customer or internal personnel (if the email address is set up).</p> <p>See Chapter 16, “Working with Interactions,” page 213.</p>
Recent Transactions	This area lists all the transactions that occur during the current interaction.
Relationship Viewer	<p>All of the business object relationships for the customer are accessible from this page.</p> <p>See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i>, “Working with the Relationship Viewer”.</p>
Tasks	<p>This page lists all the tasks that pertain to the business object. You can drill down to view the task detail.</p> <p>See Chapter 22, “Working with Tasks,” page 319.</p>

The specific information that you see on a 360-Degree View page varies depending on whether you are viewing a customer, contact, site, partner, worker, or human resources help desk (HRHD) worker.

All interactions with the business object are recorded and appear in the Activities section of the 360-degree view. An interaction can contain multiple subinteractions. For example, a call with a customer might involve a case being updated, a service order being added, and a note about the customer being sent. All of these subinteractions are logged under the same interaction.

The following types of 360-degree views are available. The specific activities and transactions that appear in the Activity Tree page region and Go To drop down box differ depending upon which 360-degree view you access.

- Customer

The customer 360-degree view is used to manage transactions and activities that relate to customers, sites and contacts of customers.

- Partner

The partner 360-degree view is used to manage transactions and activities that relate to partners and contacts of partners.

See *PeopleSoft Enterprise Partner Relationship Management 8.9 PeopleBook*.

- Worker

The worker 360-degree view is used to manage cases and interactions for workers who call the Help Desk for support.

See *PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook*.

- HRHD Worker

The HRHD Worker 360-degree view is used to initiate transactions and manage activities that relate to the worker's human resources data. In addition to the sections that appear on all 360-degree views, the HRHD worker 360-degree view includes information about the worker's job and position, payroll information, and benefits.

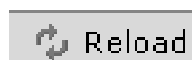
The HRHD 360-degree View page provides security that is based on section-level information only. There is no field-level security. For example, if an agent has access to information for one job and not the other, or the agent only has access to part of the information, the system still retrieves all job information. This enables a true 360-degree view of an employee.

See *PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook* and [Chapter 4, "Setting Up PeopleSoft Customer Relationship Management Security and User Preferences," page 39](#).

The 360-Degree View Toolbar

The 360-Degree View toolbar contains several buttons that assist the customer service representative in using the 360-Degree View.

PeopleSoft Customer Relationship Management (PeopleSoft CRM) provides these predefined 360-Degree View toolbar buttons:



Click the Reload button to refresh the information that appears on the 360-Degree View tree.



Click the New Search button to finish the interaction with the current customer and return to the Search page. Depending on the option that was selected for Callback Interaction when the tree was originally

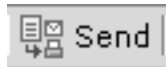
set up, the interaction status is either identified as *Completed* or left open for further activity with the customer.



Click the Notify button to send a notification.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Sending Manual Notifications”.

Note. This button does not appear for the Company role.



Click the Send button to send a correspondence.

See *PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook*, “Sending Correspondence”.

Note. This button does not appear for the Company role.



Click to add the selected contacts to the My Contacts list.

Return

Click to transfer back to the page from which you accessed the 360-Degree View. This button appears only if you transfer to the 360-Degree view from another PeopleSoft page.

Personalize

Click the Personalize link to personalize the toolbar buttons.

See Also

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

Accessing the 360-Degree View

This section discusses how to search for customers in the 360-degree view.

Note. Only the Customer 360-degree view search page is discussed in detail. The search pages that are used to access other 360-degree views are similar in usage.

Page Used to Access the 360-Degree View

Page Name	Object Name	Navigation	Usage
Search For Customer	RB_TD_AGT_SRCH_GBL	Customer 360-Degree View, Search for Customer	Search for a customer whose information you want to view.
Search for Partner	RB_TD_AGT_SRCH_PRT	Partner 360-Degree View, Search for Partner	Search for a partner whose information you want to view.
Search for Worker	RC_HD360_SRH	Worker 360-Degree View, Search for Worker	Search for a worker whose information you want to view.
Search for Worker	RC_HRHD360_SRH	HRHD Worker 360-Degree View, Search for Worker	Search for a worker whose human resources information you want to view.

Searching for Business Objects in the 360-Degree View

Access the search page for a customer, partner, or worker.




Note. The Search for Customer page is shown for illustration purposes. The other search pages are similar in usage.



My Contacts

Search Contacts

First Name begins with Teri


▼ Contacts

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


Select		Last Name	First Name	Company	Title	Phone	Email Address
<input type="checkbox"/>		Thomas	Teri	MMA Property Management Group	Management Associate	651/785-2546	tthomas@mma.com
<input type="checkbox"/>		Katen	Teri	IMC, Inc	Support Manager	612/340-1212 (332)	tkaten@imc3.com

☐ Check All / Clear All

▼ Search


Use Saved Search 

First Name


begins with 

Teri


Last Name

begins with 


Company




begins with 

Phone

begins with 

Email

begins with 

[Advanced Search](#)
 [Save Search Criteria](#)
 [Delete Saved Search](#)
 [Personalize Search](#)

Search Contacts page

Search

You can enter search criteria in any or all of the search fields. The system searches for business objects that match the criteria you enter.

Note. This search uses the customer identification framework.

See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, “Using Business Object Search and Quick Create Functionality,” Customer Identification.

Search Results

If more than one match for the search criteria that you enter is found, then all business objects that match the search criteria appear in the Search Results page region. If only one record matches the search criteria, then the 360-Degree View page for that object appears.

Select Action <input type="text" value="Create Company With Contact"/> <input type="button" value="Go"/>							
Search Results							
<u>Last Name</u>	<u>First Name</u>	<u>Name</u>	<u>Consumer</u>	<u>Phone</u>	<u>Email</u>	<u>Address 1</u>	<u>City</u>
Hill	Kelly		Larry Hill	925/694-7811	khill@hill.com	4440 Rosewood Dr	Pleasanton
Hill	Larry			925/874-8965	larryhill@yahoo.com	147 Creekside Drive	Dublin
Hill	Larry	Sparkle Clean Laundromats		925/874-8965	larryhill@yahoo.com	147 Creekside Drive	Dublin
Hills	Nancy	Greenberg Financial					

Search for Customer: Search Results page

For business objects that are contacts of either customers or partners, one row appears in the Search Results page region for each customer or partner that the individual represents. The Name column that appears in the row for an individual identifies the company that the individual represents, and the Consumer column identifies the consumer that the individual represents. If both the Name and Consumer columns in a row are blank, then the individual listed in the row is a consumer.

Create New

Select a role to create from the list of available roles.

The system determines the available roles from the search criteria that you entered. For example, suppose that you enter a value in the Organization field, the available role is *Company*, but if you enter a value in either the First Name or Last Name field, the available roles are the roles that are associated with the Individual business object type: *Company with Contact*, *Consumer*, or *Consumer with Contact*.

To use this functionality, you must have previously set up Quick Create for that object. Once you create the new business object, the system transfers you to the 360-Degree View automatically, using the newly created business object.

See Also

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, “Using Business Object Search and Quick Create Functionality”

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, “Using Business Object Search and Quick Create Functionality,” Searching for Business Objects

Managing Overall Activity for a Business Object

This section discusses how to manage overall information for a business object.

See Also

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, “Working with the Relationship Viewer”

Chapter 22, “Working with Tasks,” page 319

Pages Used to Manage Overall Activity for a Business Object

Page Name	Object Name	Navigation	Usage
360-Degree View	RB_TD_AGENT_VIEW	<ul style="list-style-type: none"> Customer 360-Degree View, Search for Customer. Select an existing customer. Partner 360-Degree View, Search for Partner. Select an existing partner. Worker 360-Degree View, Search for Worker. Select an existing worker. HRHD Worker 360-Degree View, Search for Worker. Select an existing worker. 	Manage overall activity for the business object.
360-Degree View - Relationship Viewer	RB_TD_REL_VIEWER	Access the 360-Degree View page. Select the Relationship Viewer tab.	View the relationships for with the business object whose information appears on the 360-Degree View page.
360-Degree View - Task	RB_TD_TASK_LIST	Access the 360-Degree View page. Select the Task tab.	Maintain the tasks that are associated with the business object whose information appears on the 360-Degree View page.

Managing Overall Activity for a Business Object

Access the 360-Degree View page.

360-Degree View

Reload | New Search | Add to My Contacts | Personalize

360-Degree View | Relationship Viewer | Tasks

*Role Company Go To Go

Summary

Name MMA Property Management Group

Address 1200 Lake Drive, Circle Pines, MN, 55014, USA

Email MMA@mma.com

Phone 800/988-5644

Customer Value Gold

Segment ★★★★★

360-Degree View page (1 of 2)

Activities

*Date Filter 6 - Last Year

First | Previous | Next | Last | Left | Right

Overview of - MMA Property Management Group

- Recommendations - (3)
 - Current - (3)
 - Past - (0)
- Agreements - (4)
- Installed Products - (39)
- Support Cases - (0)
- Defects - (0)
- Orders - (0)
- Quotes - (0)
- RMA's - (0)
- Service Orders - (0)
- Leads - (0)
- Opportunities - (0)
- Marketing Contacts - (0)
- Interactions - (0)

Recommendations

Product	Score	Date
30-inch Electric Cooktop	40	2004-05-24
21 inch Electric Cooktop	40	2004-05-24
Full Size Countertop Microwave	40	2004-05-24

Log Interaction

Recent Transactions

360-Degree View page (2 of 2)

Role

Select a role that is listed for the business object, or customer is a contact, the profile changes to reflect data that is relevant to that role.

Go To

Select the transaction that you want to perform from the 360-Degree View. Delivered values are *Case*, *Defect*, *Lead*, *Installed Product*, *Product Registration*, *Sales Opportunity*, *Sales Order/Quote*, *Service Order*, *Agreement*, and *RMA* (Return Material Authorization) for the core transactions.

Activities

This region contains the 360-Degree View Tree, which displays all activities and interactions with the customer.

Activities are grouped by transaction type. Expand the folder or icon next to a transaction type to view activities for that transaction type.

Depending the way the system is configured, you can add transactions or search for transactions of a particular type. Click a detail link to access transaction detail or click the activity summary to view a grid that lists summary information about the transactions.

Date Filter

Select the date filter for the activities that you want to view. Values are *1 - Today*, *2 - Yesterday*, *3 - Last Week*, *4 - Last 2 Weeks*, *5 - Last Month*, *6 - Last Year*, and *7 - View All*.

If you select *6 - Last Year* and the tree header has a maximum date filter of *5 - Last Month*, the system stops the user from viewing records that are older than the maximum date filter criteria.

If you select *7 - View All* and you don't enter maximum date filter criteria in the tree header, all of the records appear.

When the 360-Degree View page initially appears, the date range that you specify in the profile of the user who is currently accessing the system appears by default. If the user's profile is not available, the activities for the date range that you specify in the tree appear. When defining the tree, you specify the date filter and maximum date filter to use when displaying this page.

See [Chapter 17, "Setting Up the 360-Degree View," Setting Up the 360-Degree View Tree](#), page 231.

From and Through

Enter the date range for the information that you want to see on the 360-Degree View. After you enter the date range, click the Go button.

Note. The From and Through fields appear on this page only after you enable data filtering on the 360-Degree View - Personalize page.

Activities Detail

A dynamic grid that lists key information from the most recent transactions for the activity type that you click in the 360-Degree view tree appears in this page region.

The label for this grid changes depending on the type of information you view. For example, when you click *Agreements* in the 360-Degree view tree, the dynamic grid that appears is labeled *Agreements-View All* and shows important information from agreement records. You can configure the number of transactions and the columns that appear in this grid.

See [Chapter 17, "Setting Up the 360-Degree View," Defining Dynamic Grids](#), page 247.

Log Interaction

The fields in the Log Interaction page region are used to capture the details of an interaction.

Every time that you record a subinteraction on this page, the system groups the subinteractions into one related interaction. You can perform multiple subinteractions for a customer at one time before you leave this page. The subinteractions that you created previously appear in the Related Activities group box.

See interactions chapter

Contact Method

Select the contact method for the interaction. Delivered values include *Inbound Chat*, *Inbound Email*, *Inbound Fax*, *Inbound Phone*, *Inbound Web*, *Outbound Email*, *Outbound Fax*, and *Outbound Phone*.

Interaction Status

Select the interaction status. Delivered values include *Busy*, *Callback*, *Child Answered*, *Completed*, *Do Not Call Again*, *In Progress*, and *No Answer*.

Callback Date and Time

Enter a date and time for callback.

Add Note

Enter a note to add to the interaction. The note is saved in the 360-Degree View Tree as a subinteraction.

Email Note Click to send the note to the customer.

See Also

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, “Defining Person Business Objects”

Personalizing Date Filters

Access the Personalize page.

Enable Filtering on Date Range Select to enable you to enter a date range in From and Through fields when you return to the 360-Degree View. This date range filters the transactions that appear on the 360-Degree View.

Viewing Customer Relationships

Access the 360-Degree View - Relationship Viewer page.

See *PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook*, “Working with the Relationship Viewer”.

Maintaining Customer Tasks

Access the 360-Degree View - Tasks page.

See Chapter 22, “Working with Tasks,” page 319.

PART 5

Self-Service for Customers

Chapter 19

Setting Up Customer Self-Service

Chapter 20

Working with Customer Self-Service Transactions

CHAPTER 19

Setting Up Customer Self-Service

This chapter provides an overview of customer self-service features for PeopleSoft Customer Relationship Management (PeopleSoft CRM) Order Capture and discusses how to:

- Set up guest IDs to access self-service sites.
- Set up user registration features.
- Set up Contact Us features.
- Set up product registration.

Understanding Customer Self-Service Setup

This section discusses:

- Self-service sites.
- Self-service user registration.
- Contact Us notifications.
- Product registration.

Self-Service Sites

Several aspects of a self-service site are controlled by characteristics of the user ID that provides site access. When users first access a site, they are logged on to the site with a guest ID. This guest ID is specified in the site's configuration properties file or defined on the query string of the uniform resource locator that one uses to access the site. By setting up multiple guest IDs with different characteristics, you can create multiple self-service sites.

For example, you may want to create an English site and a Spanish site. Or you may want to create a European site that uses a European business unit, and a U.S. site that uses a U.S. business unit. You might even want to create multiple European sites that use different languages but that all point to the same European business unit. To accomplish all of this, create multiple guest IDs with the appropriate characteristics.

If you set up multiple guest IDs, the self-service sign in page enables users to switch between guest IDs. For example, if you set up guest IDs for different languages and use language names as IDs descriptions, then visitors can select from a list of languages. The system stores the label for the field that visitors use to select a guest ID in the message catalog to make it easy for you to change the label to suit your business needs.

Site Branding

You can create distinctive Web sites for your company's self-service sites by setting them up as branded sites. Use PeopleSoft Enterprise Portal Pack to quickly implement a portal with your own "look and feel," or branding.

See Also

PeopleSoft Enterprise CRM Portal Pack 8.9 PeopleBook

Self-Service User Registration

A self-service user registers in one of these three ways, each of which is secured differently:

1. Existing customer.

Customers who already exist in the system can add a self service user login for their account. To do so, they must enter information that you define to identify them as a current customer. After the system verifies their status, they must enter only a password to establish a self-service user ID. The system obtains other information from their existing customer record.

2. New customer.

This is for new self service users who can be consumers or businesses. You must set up a guest account to handle each type of user that might register for self service because new user logins take their defaults from the guest account.

Security is controlled by the privileges that you establish and assign to guest user IDs. A user first signs on using a guest ID that you provide. When the user registers, the system clones the currently active guest ID and all its access privileges to create the new user ID, and then creates the necessary customer or consumer record in the CRM database.

3. Contact of an existing customer company.

A contact of an existing company can register as a business user who represents a customer company by entering a key that you define and provide to them.

To register, users are required to read and accept terms of service and a privacy policy that you set up.

User Passwords and Password Hints

A user can add a password hint question and answer when they register. This enables users who forgot their passwords to request new passwords after answering a hint question. A user can also change their password hint.

To enable this feature, you must set up forgotten password email text at the system level. Additionally, the user must:

- Have a primary email address.
- Establish a password hint during registration or through the Name and Sign In maintenance pages.
- Be associated with a permission list that permits the password to be emailed.

PeopleSoft CRM uses logic that is provided by PeopleTools to store the hint and answer, verify the hint that the user enters, and email the new password to the user.

See *Enterprise PeopleTools 8.45 PeopleBook: Security Administration*

See Also

Chapter 4, “Setting Up PeopleSoft Customer Relationship Management Security and User Preferences,” Implementing Self-Service Security, page 80

Contact Us Notifications

Registered users (but not guest users) use the Contact Us page to send messages to you. When customers send messages, they select from a list of subjects and topics (subcategories of subjects) that you define to identify the message subject. When the customer submits the message, the system:

- Captures the message as an interaction that is visible through the 360-Degree View and other interaction lists.
- Notifies designated people that the message is submitted.

The system determines whom to notify based on the workflow action that you associate with the subject and topic of the message. The workflow action also determines whether notifications are sent to worklists or to email addresses.

Worklist notifications automatically include a link to the interaction page; email notifications include a link only if the email template is so configured. The PeopleSoft-delivered CONTACT US FORM email template includes this link.

To take maximum advantage of interaction functionality, use the 360-Degree View to manage all follow-up communications. Using the 360-Degree View ensures that the system captures all follow-up communications as interactions. A direct email response bypasses the system and is not captured as an interaction.

Contact Us Chat

If the self-service page is so enabled, , a registered self-service customer can request a live chat. This request opens the customer chat window, a browser-based window that does not require a client install or applet download.

Agents receive chat requests through the MultiChannel Console, which enables them to manage multiple simultaneous chat sessions. When an agent accepts a chat request, the agent chat window opens. Agents can conference peers and supervisors into the chat, and transfer chat sessions to other agents or queues. Agents can also initiate chats with other agents on their buddy lists.

See Also

PeopleSoft Enterprise CRM 8.9 Multichannel Applications PeopleBook, “Working with Chat in PeopleSoft CRM”

Product Registration

Self-service users can register products online through PeopleSoft Customer Self-Service and 360-Degree View. When a customer signs in and selects to register a product, the system populates the Product Registration page with two lists:

- Existing products

The Existing Products section of the Product Registration page lists installed products that are already registered and their registration dates. Users click a registered product link to update the registration information or select an unregistered product to register.

- New products

Contains product catalogs, a product list, or both. The customer uses these to locate the product to register. In addition to registering products that already have installed products that are created for them, users can also use product catalogs to register new products. Product catalogs group products in a hierarchical fashion, which provides simple navigation for users to locate new products. As an administrator, you select product catalogs from the system to appear in the New Product section of the Product Registration page. Users can then drill down on any listed catalog to look for the products they want to register without having to remember and enter product names. You can also set up new catalogs that are specific for product registration. When users submit the registration, the system creates new installed products with the Installed status for products that users select from the new product list. For registered products that users select from the existing product list, the system updates the associated installed products with the information (date of registration, serial ID, and so on) that it collects from the product registration. You can specify what installed product fields are available for display or editing on the Product Registration - Product Registration Details page. You can also configure the system to display only installed products of certain statuses. This enables you to limit the registration process to installed products for which product registration makes sense; for example, if you don't want users to register an installed product that is canceled or uninstalled.

Note. Only registered users can register products through PeopleSoft Customer Self-Service.

Note. If the quantity of an installed product is greater than one, and they are under different statuses, the installed product appears in the Existing Products section if any one of those statuses is in the status list that you specify on the Product Registration Setup page.

Product Registration Using the 360-Degree View

Customer service representatives (CSRs) can register products for customers through the 360-Degree View. CSRs can view and update any existing installed products or select *Product Registration* in the Go To field on the page to register products for customers who call them on the phone.

See Also

[Chapter 4, “Setting Up PeopleSoft Customer Relationship Management Security and User Preferences,” Implementing Self-Service Security, page 80](#)

[Chapter 19, “Setting Up Customer Self-Service,” Setting Up Product Registration, page 272](#)

[Chapter 20, “Working with Customer Self-Service Transactions,” Registering Products, page 300](#)

Setting Up Guest IDs to Access Self-Service Sites

This section discusses how to:

- Define guest IDs.
- Change the label of the guest ID selection field.

Defining Guest IDs

To define a guest ID:

1. Define the ID in the PeopleTools User Profiles component.

Access the User Profiles component from PeopleTools, Security, User Profiles, User Profiles.

On the General page, enter the language code that is associated with the ID. Anyone who logs on with a guest ID sees all of the pages that are in the associated language code.

On the ID page, enter the description that self-service users see in the guest ID selection field. For example, if you support multiple languages and you define language-based user IDs, the descriptions might be the language names.

See *Enterprise PeopleTools 8.45 PeopleBook: Security Administration*

2. Establish the ID as a guest ID on the User Registration Setup page.

Access the User Registration Setup page from Set Up CRM, Security, Self Service, User Registration.

This is the step that makes the ID into a guest ID that allows personal and business user registration. That is, the self-service Sign In page enables users to select from IDs that have a user registration definition.

See Chapter 4, “Setting Up PeopleSoft Customer Relationship Management Security and User Preferences,” Implementing Self-Service Security, page 80.

3. Define preferences for the guest ID on the User Preferences page.

Access the User Preferences page from Set Up CRM, Security, User Preferences.

Select a default business unit and market for the guest. If you do not select a business unit, the system uses the default PeopleSoft Order Capture business unit (as established on the Order Capture Definition page).

See Chapter 4, “Setting Up PeopleSoft Customer Relationship Management Security and User Preferences,” Defining Overall Preferences , page 73.

See Also

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

Changing the Label of the Guest ID Selection Field

To change the label of the guest ID selection field:

1. Access the message catalog from PeopleTools, Utilities, Administration, Message Catalog.
2. Look up message set number 18068, whose description is *Self Service Common*.
3. Click Find Link and enter message number 19 in the search string.

The field label text appears. The default is *Select a site*.

4. Enter an alternative label for the guest ID selection field.

For example, if the guest IDs are for different languages, you might enter *Select a language*.

5. Save the changes.

Setting Up Contact Us Features

To set up contact us features, use the Contact Us Topic (SUBJECT_TABLE) and Contact Us Subject (SUBJECT_TOPIC_TBL) components.

This section lists prerequisites and discusses how to:

- Define topics.
- Define subjects and Contact Us workflow.
- Specify chat features for Contact Us pages.

Prerequisites

When customers use the Contact Us page to communicate with you, they select from a predefined list of subjects and topics. When they submit the message, the system sends a notification to a designated person. You set up this workflow for each subject and topic combination that you define.

Before you create subjects and topics, you must define the workflow actions and workflow email templates that are to be used for these notifications.

Customers can also elect to open a chat with a customer service representative if you have enabled the chat feature and specified up a chat profile and agent popup for on the self-service page.

See Also

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Setting Up PeopleSoft CRM Workflow,” Defining Workflow Actions

PeopleSoft Enterprise CRM 8.9 Automation and Configuration Tools PeopleBook, “Setting Up PeopleSoft CRM Workflow,” Defining Workflow Email Templates

PeopleSoft Enterprise CRM 8.9 Multichannel Applications PeopleBook, “Working with Chat in PeopleSoft CRM”

Pages Used to Set Up Contact Us Features

Page Name	Object Name	Navigation	Usage
Chat Enabled Page Setup	RB_CHAT_ADMIN	Set Up CRM, Product Related, Multichannel Definitions, Chat, Chat Page Setup, Chat Enabled Page Setup	Specify chat features for Contact Us pages.
Contact Us Topic	CONV_SUB_TOPIC_TBL	Set Up CRM, Common Definitions, Contact Us, Contact Us Topic, Contact Us Topic	Define topics that customers select when requesting that you contact them.
Contact Us Subject	SUBJECT_TABLE	Set Up CRM, Common Definitions, Contact Us, Contact Us Subject, Contact Us Subject	Define subjects that customers select when requesting that you contact them, and set up workflow for each subject.

Specifying Chat Features for Contact Us Pages

Access the Chat Page Setup page.

See Also

PeopleSoft Enterprise CRM 8.9 Multichannel Applications PeopleBook, “Working with Chat in PeopleSoft CRM”

Defining Topics

Access the Contact Us Topic page.

Contact Us Topic

SetID CRM01

Contact Us Topic QUESTION

Contact Us Subject Topic

***Description** CRM Product Line

Contact Us Topic page

Specify a topic and topic description. You associate the topics with Contact Us subjects to enable users to select the subject and topic for a particular Contact Us request.

Defining Contact Us Subjects and Workflow

Access the Contact Us Subject page.

Contact Us Subject

SetID CRM01

Contact Us Subject PRODQUEST

Subject Find | View All First 1 of 1 Last

***Effective Date** 11/06/2001

***Description** General Product Question

Subject Detail Find | View All First 1 of 1 Last

Contact Us Topic QUESTION

Email Template Contact Us Form

Workflow Action ContactUs

Contact Us Subject page

When you define a subject, specify the associated topics and the workflow objects (a workflow action and email template) that the system uses to deliver the customer's request to a particular worklist.

Effective Date	Enter the effective date of the email template data.
Description	Enter a description of the subject (up to 36 characters).
Contact Us Topic	Enter topics to associate with this subject.
Email Template	For each subject and topic combination, select the workflow email template that the system uses to create the text in its email notifications.

Workflow Action

For each subject and topic combination, specify the workflow action that the system uses to send a notification that alerts a worker to the newly submitted message.

Setting Up Product Registration

To set up product registration features, use the Product Registration (RB_PROD_REG_SETUP) table.

This section discusses how to set up product registration features.

See Also

Chapter 19, “Setting Up Customer Self-Service,” Product Registration, page 267

Chapter 20, “Working with Customer Self-Service Transactions,” Registering Products, page 300

Pages Used to Set Up Product Registration for Self-Service Users

Page Name	Object Name	Navigation	Usage
Product Registration Setup	RF_PROD_REG_SETUP	Set Up CRM, Product Related, Installed Product, Product Registration, Product Registration Setup	Configure the registration page for installed products.
Catalogs	RF_PROD_REG_SETUP2	Set Up CRM, Product Related, Installed Product, Product Registration, Catalogs	Select product catalogs that self-service users can use to search for and register products.

Configuring Installed Product Registration

Access the Product Registration Setup page.

Product Registration Setup Catalogs

SetID IPROD

Installed Product Statuses Customize Find First 1-3 of 3 Last

*Installed Product Type	Status		
Product	Installed	+	-
Product	Pending	+	-
Product	Shipped	+	-

Registration Fields Customize Find First 1-6 of 6 Last

Name	Field	Modifiable		
Comments	COMMENTS254	<input checked="" type="checkbox"/>	+	-
Purchase Date	INSTALLED_DATE	<input checked="" type="checkbox"/>	+	-
Physical Location	LOCN	<input checked="" type="checkbox"/>	+	-
Date Registered	REGISTERED_DATE	<input checked="" type="checkbox"/>	+	-
Serial ID	SERIAL_ID	<input checked="" type="checkbox"/>	+	-
Site ID	SITE_ID	<input checked="" type="checkbox"/>	+	-

Product Registration Setup page

Installed Product Statuses

Specify the statuses for which installed products (that belong to the self-service user) appear in the Existing Products section of the Product Registration page.

Note. Product registration setup is keyed to setID.

Market Select the market value for the installed product status. For each status, you can only select from markets that currently exist for that status value.

Status Enter the status for installed products to appear on the Product Registration page.

Registration Fields

Define the installed product fields that appear to self-service users on the Product Registration Details page and whether the fields are modifiable or read-only. The system uses this information as default values on the Installed Product page of the Product Definition component. When a product requires a different set of fields to appear to self-service users, you can override the default fields in the Product Definition component.

Name Select the field to appear on the Product Registration Details page. Values are *Asset Tag, Authorization Code, Comments, Date Registered, Department, Distributor, Distributor Contact, Environment, Install Type, Item Shipping Date, Network, Operating System, Operating System Version, Order Date, Ownership, Physical Location, Platform, Purchase Date, Serial ID, Site ID, and User Interface*. The system uses this value as the name of corresponding fields that you see on the registration page.

Modifiable

Select to enable users to modify the corresponding field. Clear this check box for fields that need to be read-only when updating previously registered products on the Product Registration Details page. When registering a product for the first time, users can modify all fields except the product description and the registration date, whether or not you select this check box.

Specifying Registration Catalogs

Access the Catalogs page.

Product Registration Setup Catalogs

SetID IPROD

Registration Catalogs Customize Find 1-4 of 4 First Last

*Catalog	Description		
303	Cold Storage Unit Catalog	+	-
304	Accessories and Parts	+	-
305	International Catalog	+	-
306	Commercial Appliances	+	-

Catalogs page

Catalog

Select a product catalog that self-service users can access in the New Product section of the Product Registration page.

CHAPTER 20

Working with Customer Self-Service Transactions

This chapter provides an overview of customer self-service and discusses how to:

- Sign in to PeopleSoft Customer Relationship Management (PeopleSoft CRM) self-service.
- Register as a personal or business user.
- Select the customers that business users represent.
- Maintain name and sign-in information.
- Maintain contact information.
- Maintain contact address books.
- Maintain consumer contact and address information.
- Maintain consumer address books.
- View internal contacts.
- Send Contact Us messages.
- Register products.

Note. You can access several of the pages that are discussed in this chapter from the pagelets in PeopleSoft CRM Portal Pack.

See Also

PeopleSoft Enterprise CRM Portal Pack 8.9 PeopleBook, “Working with CRM Self-Service Pagelets”

Understanding Customer Self-Service

Self-service transactions enable customers to access information and transact business online. PeopleSoft CRM provides transactions for self-service users to:

- Register and sign in.
- Maintain their user profile—information about themselves and their relationship with you.
- Send messages to you or to chat live online with a customer service representative (CSR).
- Register products.
- Perform application-specific functions such as ordering products and submitting support cases.

This chapter describes how users register, sign in, maintain their profiles, contact you, and register products. It also discusses the differences between self-service for consumers (personal users) and for contacts (business users). Application-specific transactions are described in the corresponding application PeopleBooks.

See Also

PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook, “Using PeopleSoft Order Capture Self Service”

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

Signing In to PeopleSoft CRM Self-Service

This section discusses how to sign in to PeopleSoft CRM self-service.

Pages Used to Sign In to PeopleSoft CRM Self-Service

Page Name	Object Name	Navigation	Usage
Sign In	RX_LOGIN	Sign In, Sign In	Sign in to PeopleSoft CRM self-service.
Forgot Password	RX_EMAIL_PSWD	Click the Password Hint button on the Sign In page.	Request a password hint.
Forgot Password - Email New Password	RX_EMAIL_PSWD2	Click the Continue button on the Forgot Password page.	Answer a password hint question to complete the request for a new password.
Confirmation	RX_EMAIL_PSWD_CNFR	Click the Email New Password button on the Forgot Password - Email New Password page.	Confirm that passwords are reset and mailed.

Signing In to PeopleSoft CRM Self-Service

Access the Sign In page.

Sign In

If you are a new user, select a registration link and register for your UserID and Password.
If you are an existing user, sign in by entering your UserID and password below.

Returning Users

Enter User ID and Password.

User ID

Password

Forgot your password? [Lookup Password Hint](#)

Existing Customer without Sign In ?
[Create Sign In](#)

New Users

[Personal User Registration](#)
Register here to establish a personal account.

[Business User Registration](#)
Register here to establish a business user account. This requires a company code and key and allows you to register under your company's account.

Website

Current website Guest - Communication

***Select a website**

Sign In page

Returning Users

Enter the User ID and Password and click the Sign In button.

If you are already set up as a customer in the CRM system but do not have a self service sign-in, click the Create Sign In link to authenticate yourself as an existing user and create a new self service user ID and password.

New Users

You can register as a personal or business user.

Either personal or business user registration causes the system to create a user ID that is associated with the new consumer or contact record, which the visitor can use to sign in on subsequent visits. The user ID is cloned from the guest ID that was active when the user registered. Menu navigation options, and in some cases, page appearances depend on the user's role or roles.

- | | |
|-----------------------------------|--|
| Personal User Registration | Click this link to establish a personal user ID. When a site visitor registers as a personal user, the system creates a consumer record for that user. |
| Business User Registration | Click this link to establish an ID as a contact for a company that is already set up in PeopleSoft CRM. When a site visitor registers as a business user, the system creates a contact record that is associated with the customer that the visitor specifies. Visitors must provide customer codes and keys that their site administrators give them for authentication purposes. |

Website

When users first access the site, they are automatically logged in using the guest ID that you identify in the configuration properties file. As long as that ID has the appropriate permissions, users can use the site with limited access. Then, users can sign in with their own user IDs and passwords to further identify themselves and acquire additional access. For example, users who access the site as guests can access the product catalog but cannot view order statuses. Once the users sign in, they can access both the product catalog and order statuses. Even after users sign in with their own user IDs, the guest ID controls certain site characteristics such as the site language.

Select a site

Select a value to switch to a different ID. Depending on how you define guest IDs, the IDs may control the site language, the business unit whose data appears, or other site characteristics. You can change the delivered field label to more accurately reflect the guest ID options that you establish (for example, the Select a Location field with *United States*, *European Market*, and *Asia* values. If you have only one site, you can hide this section from the user).

See Also

Chapter 20, “Working with Customer Self-Service Transactions,” Registering As Personal or Business Users, page 278

Chapter 19, “Setting Up Customer Self-Service,” page 265

The installation guides on the PeopleSoft Customer Connection website.

Requesting New Passwords

Access the Forgot Password page.

To request a new password, enter your user ID and click Continue.

Completing Requests for New Passwords

Access the Forgot Password - Email New Password page.

You must correctly answer a personalized password hint question before the system creates and sends a new password.

Email Address

Your primary address, which is the address to which the system sends the new password, appears here.

Email New Password

Click after entering an answer to complete the request.

After you click this button, a confirmation page appears.

Registering As Personal or Business Users

This section discusses how to register as either a personal or business self-service user.

Pages Used to Register As Personal or Business Users

Page Name	Object Name	Navigation	Usage
Sign In	RX_LOGIN	Sign In, Sign In	Sign in to PeopleSoft CRM self-service.
Registration	RX_REGISTER	Click the Personal User Registration link on the Sign In page.	Register as a personal user.
Register as a business user	RX_REGISTER_REPCHK	Click the Business User Registration link on the Sign In page.	Identify the company for a business user.
Register as a business user for <company>	RX_REGISTER_REP	Click the Continue button on the Business User Registration page.	Register as a business user.
Customer Registration	RX_REGISTER_CSTCHK	Click the Create Signin link on the Sign In page.	Register as an existing customer.
Customer Registration	RX_REGISTER_CST	Click the Continue button on the Customer Registration page.	Enter user ID and password information to complete the process of registering as an existing customer.
Partner Registration	RX_REGISTERPARTNER	Partner Registration	Register a partner company
Registration Confirmation	RX_REGISTER_CNFRM	Click the Submit Registration button on the Registration page or the Register as a business user for <Your Company> page.	Review registration information.

Registering As a Personal User

Access the Personal User Registration page.

Personal User Registration

To register, complete the form below.

Sign In Information

*User ID

*Password

*Confirm Password

*Password Hint Question

*Password Hint Answer

*Email Address

*Email Type

Personal User Registration page (1 of 2)

Your Contact Information

* **First Name**

Middle Name

* **Last Name**

* **Address Type**

* **Country**

Address 1

Address 2

Address 3

City

County

State

Postal

* **Phone Type**

Int'l Prefix

* **Phone** **Extension**

Personal User Registration page (2 of 2)

When you click the Submit Registration button, the system creates a new user ID and a new consumer record.

If a terms of service and privacy policy are set up for the self-service site, additional text containing links to these policies appears on this page. Be sure to read the terms of service and privacy policy before submitting the registration. By submitting the form, you are legally consenting to the terms in these documents.

Identifying Companies for Business User Registration

Access the Business User Registration page.

Business User Registration

Enter the Company Code and Key provided by your company.

* **Company Code**

* **Company Key**

[Cancel and Return to Sign In](#)

* Required Field

Business User Registration page

Set up keys on the Business User Registration Setup page. You give customers their company codes and keys, and they share the information with users whom they want to register under their company codes.

When a user registers, the new contact record is associated with the company that you specify on this page.

Note. When you set up a key, you can limit the number of times that it is used.

See Also

Chapter 4, “Setting Up PeopleSoft Customer Relationship Management Security and User Preferences,” Registering Business Users, page 86

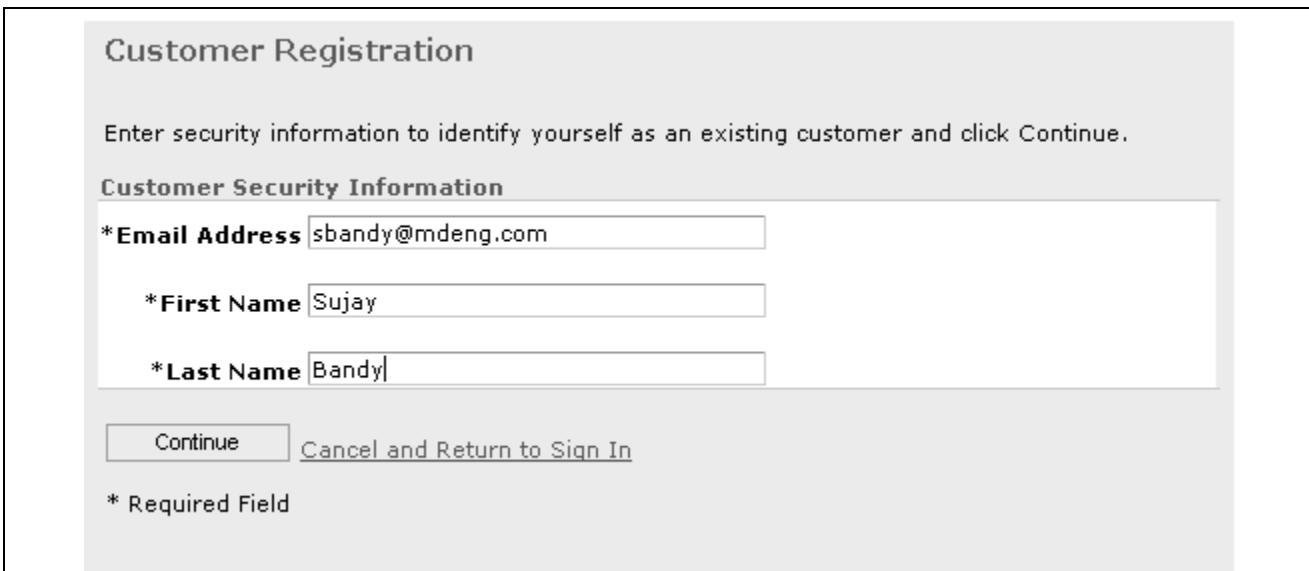
Registering As a Business User

Access the Register as a business user for <company> page. This page is similar in usage to the page for registering as a personal user.

See Chapter 20, “Working with Customer Self-Service Transactions,” Registering As a Personal User, page 279.

Registering as an Existing Customer

Access the Customer Registration page.



Customer Registration

Enter security information to identify yourself as an existing customer and click Continue.

Customer Security Information

*Email Address

*First Name

*Last Name

[Cancel and Return to Sign In](#)

* Required Field

Customer Registration page

If you already exist in the PeopleSoft CRM system as a customer or contact, you can register as a self-service user. You must enter information that identifies you to the PeopleSoft CRM system before you can complete the self-service registration process.

The fields that are available for entry on this page depend on how the user registration for existing customers is set up.

Continue

Click this button to access a page where you enter sign in information, including user ID and password.

Reviewing Registration Information

Access the Registration Confirmation page.

One of two buttons appears here, depending on what you were doing before you registered. Click Continue Shopping to access the product catalog. Click Checkout to go directly to the checkout page.

Selecting the Customers That Business Users Represent

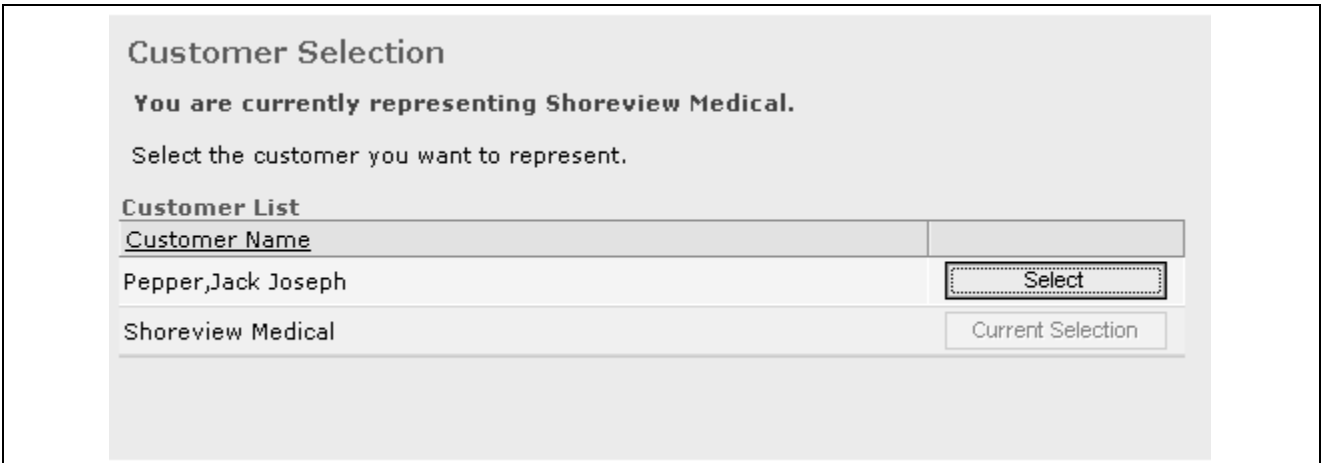
This section discusses how to select customers.

Page Used to Select the Customers That Business Users Represent

Page Name	Object Name	Navigation	Usage
Customer Selection	CUST_SELECT	Customer Section, Customer Selection	Select customers for the current session. This page is available for users that are set up as brokers who buy for multiple companies.

Selecting Customers for the Current Session

Access the Customer Selection page.



Customer Selection

You are currently representing Shoreview Medical.

Select the customer you want to represent.

Customer List

Customer Name	
Pepper, Jack Joseph	Select
Shoreview Medical	Current Selection

Customer Selection page

Select a customer from the Customer List.

Maintaining Name and Sign-In Information

This section discusses how to:

- Review name and sign-in information.
- Change names.
- Change passwords.

- Change password hints.

Note. This process is the same for consumers and contacts.

Pages Used to Maintain Name and Sign-In Information

Page Name	Object Name	Navigation	Usage
Manage Profile - Change Profile Info	RX_NAME_SIGNIN	Manage Profile, Change Profile Info	Review and edit name, password information, and privacy preferences.
Manage Profile - Change Name	RX_NAME_CHNG	Click the Change Name button on the Manage Profile - Change Profile Info page.	Update name information.
Manage Profile - Change Password	RX_PSWD_CHNG	Click the Change Password button on the Manage Profile - Change Profile Info page.	Enter passwords.
Profile - Change Password Hint	RX_HINT_CHNG	Click the Change Password Hint button on the Manage Profile - Change Profile Info page.	Enter password hints.
Manage Profile - Change Privacy Preference	RX_PREF_CHNG	Click the Change Preferences button on the Manage Profile - Change Profile Info page.	Select privacy options for screening communications.

Reviewing Name and Sign-In Information

Access the Manage Profile - Change Profile Info page.

Manage Profile

Change Profile Info

A summary of your profile is displayed below. Click the relevant Change button to make profile edits.

Name

First Name JimD

Middle Name

Last Name JimD

Password

User ID CPCUST

Password *****

Manage Profile - Change Profile Info page (1 of 2)

Password Hint

Password Hint Question What is my company name ?

Password Hint Answer PEOPLESOFT

Email Address

Contact Preferences

Privacy ☐ **Do Not Contact**

☐ **Do Not Email**

☐ **Do Not Call**

☐ **Do Not Mail**

Manage Profile - Change Profile Info page (2 of 2)

Maintaining Contact Information

This section discusses how to maintain contact information.

Pages Used to Maintain Contact Information

Page Name	Object Name	Navigation	Usage
Manage Profile - Default Addresses	RX_PROFILE_DFLT	Manage Profile, Default Addresses	Manage default mailing, shipping, and billing address information.
Manage Profile - Contact Information	RX_ADR_MY_INFO	Click the Change Contact Information button on the Manage Profile - Default Addresses page.	Update primary contact information.
Address Book - Create New Address, Address Book - Update Address	RX_ADR_CUST_ADDR	Click the Edit link for an existing address or the Add New Address button on the Profile - Contact Information page.	Create or update addresses that are associated with the user.
Delete Confirmation	RX_ADR_DEL_CONFIRM	Click the Delete link for any non-primary address, phone number, or email address on the Profile - Contact Information page.	Confirm the deletion of the address, phone number, or email address.

Accessing Default Address Information

Access the Manage Profile - Default Addresses page.

Manage Profile
Default Addresses

Primary Contact Information

Phone 925/694-1111

Email Address jimd@adventure54.com

[Change Contact Information](#)

[Return to Manage Profile](#)

Manage Profile - Default Addresses page

Updating Primary Contact Information

Access the Manage Profile - Contact Information page.

Address Book

Contact Information

Adventure 54

Edit contact information and save. Edit/Delete existing address, or Add a new address.

Contact Information

*First Name David

Middle Name L

*Last Name Perry

Select contact roles for this person. (Check all that apply)

Contact Role: ☒ Billing Contact

☒ Shipping Contact

☒ Sold To Contact

No address available.

Save Contact

Add New Address

[Cancel and Return to Customer's Primary Information](#)

Manage Profile - Contact Information page

The Add New Address button transfers you to a page where you can add address information. The Add New Phone and Add New Email buttons add a new row to the Phone or Email grid for you to enter the new information. The user can edit their current phone numbers and email addresses directly on this page.

Maintaining Contact Address Books

This section discusses how to:

- Review customer addresses.
- Review customer contacts.
- Review customer primary information.
- Create customers or contact addresses.
- Create customer contacts.
- Select existing contacts.
- Select existing addresses.
- Maintain name, role information, and relationship address for customer contacts.
- Update customer or contact addresses.

Pages Used to Maintain Contact Address Books

Page Name	Object Name	Navigation	Usage
Address Book: View Addresses	RX_ADR_CUST_INFO	<ul style="list-style-type: none"> Manage Profile, Address Book Click the View Addresses link on the Address Book (View Contacts) page or the Address Book - Customer's Primary Information page. 	Review addresses that are associated with the customer.
Address Book: View Contacts	RX_ADR_CUST_CNTCT	Click the View Contacts link on the Address Book (View Addresses) page or the Address Book - Customer's Primary Information page.	Review contacts that are associated with the customer.
Address Book: Customer's Primary Information	RX_ADR_CUST_DFLT	Click the View Customer's Primary Information link on the Address Book (View Addresses) or Address Book (View Contacts) page.	Review default contacts and addresses that are used for specific purposes.
Address Book - Create New Address	RX_ADR_REP_ADDR	Click the Add New Address button on the Address Book - Contact Information page.	Add a new address for a contact.
Address Book - Create New Contact	RX_ADR_NEW_REP	Click the Add New Contact button on the Address Book (View Addresses) page or the Address Book (View Contacts) page.	Create new contacts or new addresses for the customer.
Address Book - Select Contact	RX_ADR_USE_CNTCT	<ul style="list-style-type: none"> Click a Replace link on the Address Book - Customer's Primary Information page. Click the Copy Existing Contact link on the Address Book - Create New Contact page. 	Select new primary contacts for the roles that appear on the Address Book - Customer's Primary Information page and to copy the contacts into new address book entries.
Address Book - new address - Select Address	RX_ADR_SEL_CUST_DF	<ul style="list-style-type: none"> Click a Replace link on the Address Book - Customer's Primary Information page. Click the Copy Existing Address link on the Address Book - Create New Contact page. 	Select new primary addresses for the address roles that appear on the Address Book - Customer's Primary Information page and copy the addresses into new address book entries.

Page Name	Object Name	Navigation	Usage
Address Book - Contact Information	RX_ADR_REP_INFO	<ul style="list-style-type: none"> Click an Edit link on the Address Book - Customer's Primary Information page. Click the Edit link on the Address Book (View Contacts) page. 	Edit an existing contact's information.
Address Book - Create New Address	RX_ADR_CUST_ADDR, RX_ADR_NEW_ADDR, RX_ADR_NEW_REP	<ul style="list-style-type: none"> Click the Add New Address button on the Address Book (View Addresses) page. Click the Add New Address link on the Address Book - new address - Select Address page. 	Add a new address for a customer. You do not need to associate the address with a specific contact.
Address Book - Update Address	RX_ADR_CUST_ADDR, RX_ADR_REP_ADDR	<ul style="list-style-type: none"> Click an Edit link on the Address Book - Customer's Primary Information page. Click the Edit link on the Address Book (View Addresses) page. Click an Edit link on the Address Book - Contact Information page for any contact who is associated with one or multiple addresses. 	Modify existing addresses.
Delete Confirmation	RX_ADR_DEL_CONFIRM	Click the Delete link on the Address Book (View Addresses) page or on the Address Book (View Contacts) page.	Confirm that you want to delete an address or contact. A deleted address is removed from the contact's address book but remains in the system with an end date that is equal to the date on which it was deleted.

Reviewing Customer Addresses

Access the Address Book: View Addresses page.

Address Book

Adventure 54

[View Addresses](#) [View Contacts](#) [View Customer's Primary Information](#)

Click [View Addresses](#), [View Contacts](#), or [View Customer's Primary Information](#) to view Address Book information. Options, such as Edit, Delete, and the Add buttons, vary according to your security privileges.

View Addresses

***Address Filter** Show all addresses

Address	Billing	Shipping	Sold To		
Central Office 4655 E 22nd Street Tucson, AZ 85711 United States	Primary	Primary	Primary	Edit	Delete

[Add New Address](#) [Add New Contact](#)

Address Book: View Addresses page

Addresses that are associated with the customer appear on this page. If the address is associated with a specific site, the site name appears as well.

Address Filter

Select *Show all addresses*, *Show billing addresses*, *Show install-to site addresses*, *Show shipping addresses*, or *Show sold-to addresses*.

Billing, Shipping, and Sold To

Primary appears in the appropriate column for the primary billing, shipping, and sold-to addresses. *Yes* appears in the appropriate column for additional addresses. To change a company's primary addresses, access the Address Book - Customer's Primary Information page.

Deleting Addresses

When you click the Delete link for an address, the Delete Confirmation page appears.

If the address is associated with a contact, you can select whether to delete the address for all contacts who use this address or only for the current contact.

If you delete the address for all contacts but the address is a default bill to, ship to, or sell-to address, the system does not delete the address. Instead, the system removes any associations that contacts have to this address.

Reviewing Customer Contacts

Access the Address Book: View Contacts page.

Address Book

Adventure 54

[View Addresses](#)
[View Contacts](#)
[View Customer's Primary Information](#)

Click View Addresses, View Contacts, or View Customer's Primary Information to view Address Book information. Options, such as Edit, Delete, and the Add buttons, vary according to your security privileges.

Contacts

Name	Billing	Shipping	Sold To		
Perry,David L	Yes	Yes	Yes	Edit	Delete
Jacobsen,Karen	Primary	Primary	Primary	Edit	Delete
Trimble,Kelly	Yes	Yes	Yes	Edit	Delete
Carman,Jake	Yes	Yes	Yes	Edit	Delete
Grady,Sheila	Yes	Yes	Yes	Edit	Delete
JimD,JimD	Yes	Yes	Yes	Edit	Delete

[Add New Contact](#)

Address Book - View Contacts page

Contacts who are associated with the customer appear on this page.

Billing, Shipping, and Sold To

Primary appears in the appropriate column for the primary billing, shipping, and sold-to contacts. *Yes* appears in the appropriate column for additional contacts. To change a customer's primary contacts, access the Address Book - Customer's Primary Information page.

Reviewing Customer Primary Information

Access the Address Book: Customer's Primary Information page.

Customer's Primary Information

Adventure 54

[View Addresses](#)
[View Contacts](#)
[View Customer's Primary Information](#)

Click View Addresses, View Contacts, or View Customer's Primary Information to view Address Book information. Options, such as Edit, Delete, and the Add buttons, vary according to your security privileges.

Primary Information

Customer Contact:	David Perry	Edit	Replace
Billing Contact	Karen Jacobsen	Edit	Replace
Shipping Contact	Karen Jacobsen	Edit	Replace
Sold To Contact	Karen Jacobsen	Edit	Replace
Customer Address:	Central Office 4655 E 22nd Street Tucson, AZ 85711 United States	Edit	Replace
Billing Address:	Central Office 4655 E 22nd Street Tucson, AZ 85711 United States	Edit	Replace
Shipping Address:	Central Office 4655 E 22nd Street Tucson, AZ 85711 United States	Edit	Replace
Sold To Address:	Central Office 4655 E 22nd Street Tucson, AZ 85711 United States	Edit	Replace

Address Book: Customer's Primary Information page

The customer's overall primary contact and address and primary billing, shipping, and sold-to contacts and addresses appear on this page. You can modify the contacts and addresses or select a new primary contact and address.

Creating Contact Addresses

Access the Address Book: Create New Address page.

Address Book
Create New Address

Adventure 54

Enter new address information and Save.

Address Information

*Address Type

*Country

Address 1

Address 2

Address 3

City

County

State

Postal

Select roles for how the address will be used. (Check all that apply)

Address Role: ☐ **Bill To Customer**
☐ **Ship To Customer**
☐ **Sold To Customer**

Address Book: Create New Address page

This page is similar to the Create New Address page

Enter the new address information. If the address is a billing, shipping, or sold-to address, select the appropriate address role check box.

Note. The Address Roles appear only for users who are contacts of companies, not for end consumers.

Creating Customer Contacts

Access the Address Book: Create New Address page.

This page is similar in use to page that is used to create new contact addresses, except that it contains additional lines for you to enter contact information.

Contact Information

If the new contact is a billing, shipping, or sold-to contact, select the appropriate contact role check box.

Invitees				
Name	Role	Telephone	Status	Attendance
Terry Murphy	Worker		Assigned	
First Name	Last Name	Add		

Contacts				
Name	Role	Telephone	Primary	
Alex Ash	Worker		<input type="checkbox"/>	
Alan Lee	IMC, Inc	612/340-1412	<input type="checkbox"/>	
Jack Pepper		555/441-3310	<input type="checkbox"/>	
First Name	Last Name	Add		

Address Book: Create New Address - Contact Information page

Selecting Existing Contacts

Access the Address Book: Select Contact page.

Address Book

Select Contact

Adventure 54

Click Select to specify the contact you will use.

Name	
Perry,David L	Select
Jacobsen,Karen	Select
Trimble,Kelly	Select
Carman,Jake	Select
Grady,Sheila	Select
JimD,JimD	Select

[Return to Create New Contact](#)

Address Book: Select Contact page

Selecting Existing Addresses

Access the Address Book - new address: Select Address page.

Address Book

Select Address

Click Select to specify the address you will use.

Address	Select
Central Office 4655 E 22nd Street Tucson, AZ 85711 United States	Select

Add New Address

[Cancel and Return to Customer's Primary Information](#)

Address Book - new address: Select Address page

Maintaining Name, Role Information, and Relationship Address for Customer Contacts

Access the Address Book - Contact Information page.

Address Book

Contact Information

Adventure 54

Edit contact information and save. Edit/Delete existing address, or Add a new address.

Contact Information

***First Name** David

Middle Name L

***Last Name** Perry

Select contact roles for this person. (Check all that apply)

Contact Role: ☒ **Billing Contact**
☒ **Shipping Contact**
☒ **Sold To Contact**

No address available.

Save Contact Add New Address [Cancel and Return to Address Book](#)

Address Book - Contact Information page

If the contact is a billing, shipping, or sold-to contact, select the appropriate contact role check box.

Click Edit or Delete to maintain address for the contact-to-customer relationship. Click the Add New Address button to enter a new address for this relationship.

Updating Customer or Contact Addresses

Access the Address Book - Update Address page.

Address Book

Update Address

Adventure 54

Enter a contact's name and address information. You can copy an existing contact or an existing address to this form by clicking the appropriate link.

Contact Information

*First Name

Use existing contact

Middle Name

*Last Name

Select contact roles for this person. (Check all that apply)

Contact Role:

☐ Billing Contact
 ☐ Shipping Contact
 ☐ Sold To Contact

Address Information

*Address Type

Business

Use existing address

*Country

United States

Address 1

Address 2

Address 3

City

County

State

Postal

Select roles for how the address will be used. (Check all that apply)

Address Role:

☐ Bill To Customer
 ☐ Ship To Customer
 ☐ Sold To Customer

Address Book - Update Address page

This page is almost identical to the Address Book - Create New Address page. Unless you are a contact of a customer, the *Address Roles* are not visible.

Maintaining Consumer Contact and Address Information

This section lists the pages that consumers use to maintain their contact and address information.

Note. These pages are similar in appearance and usage to the pages that are used to maintain address information for Contacts.

See [Chapter 20, “Working with Customer Self-Service Transactions,” Maintaining Contact Information, page 284.](#)

Pages Used to Maintain Consumer Contact and Address Information

Page Name	Object Name	Navigation	Usage
Manage Profile	RX_PROFILE	Manage Profile, Change Profile Info	Review and edit name, password, and privacy preferences.
Manage Profile - Default Addresses	RX_PROFILE_DFLT	Manage Profile, Default Addresses	View and initiate update of the consumer's default contact information, shipping address, and billing address information.
Manage Profile - Contact Information	RX_ADR_MY_INFO	Click the Change Contact Information button on the Manage Profile - Default Addresses page.	Change the consumer's address, phone number, and email address information.
Address Book - Customer's Primary Information	RX_ADR_CUST_DFLT	Click the Change Default Shipping or Change Default Billing button on the Profile - Default Addresses page.	Review the consumer's primary address, primary billing address, and primary shipping address.
Address Book - new address - Select Address	RX_ADR_SEL_CUST_DF	Click a Replace link on the Address Book - Customer's Primary Information page.	Select a new address of any of the address roles that appear on the Address Book - Customer's Primary Information page.
Address Book - Create New Address, Address Book - Update Address	RX_ADR_CUST_ADDR	<ul style="list-style-type: none"> Click an Edit link or the Add New Address button on the Profile - Contact Information page. Click an Edit link on the Profile - Customer's Primary Information page. 	Create or update addresses.
Address Book - Delete Confirmation	RX_ADR_DEL_CONFIRM	Click a Delete link on the Profile - Contact Information page.	Delete selected address.

Maintaining Consumer Address Books

This section lists the pages that consumers use to maintain their address books.

Note. These pages are similar in appearance and usage to the pages that Contacts use to maintain their address books. Differences in usage are explained below

See [Chapter 20, “Working with Customer Self-Service Transactions,” Maintaining Contact Address Books, page 286.](#)

Pages Used to Maintain Consumer Addresses Books

Page Name	Object Name	Navigation	Usage
Address Book	RX_ADR_CONSUMER	Click the Address Book link on the Profile page.	Review addresses that are associated with the consumer.
Address Book - Update Address	RX_ADR_CUST_ADDR	Click an Edit link on the Address Book page.	Modify addresses in the address book.
Address Book - Create New Address	RX_ADR_NEW_REP	Click the Add New Address button on the Address Book page.	Create addresses in the address book for the consumer.
Address Book - new address - Select Address	RX_ADR_SEL_CUST_DF	<ul style="list-style-type: none"> Click the Replace link on the Address Book - Customer's Primary Information page. Click the Copy Existing Address link on the Address Book - Create New Address page. 	Select addresses to copy into new address book entries.
Address Book - Delete Confirmation	RX_ADR_DEL_CONFIRM	Click a Delete link on the Address Book page.	Confirm that you want to delete the address, and select whether to delete it for all users or the current user.

Viewing Consumer Addresses

Access the Address Book page.

If the address is associated with a contact, the contact's name appears in the name columns. If the address is associated only with a consumer, the consumer's name appears in the name columns.

Deleting Consumer Addresses

Access the Address Book - Delete Confirmation page.

When you delete a consumer address that is not associated with a contact, only the Yes - Delete and No - Do Not Delete buttons appear on this page.

If the address is associated with a contact, you can select whether to delete the address for all contacts who use this address or only for the current contact.

If you delete the address for all contacts but the address is a default bill to, ship to, or sell-to address, the system does not delete the address. Instead, the system removes any associations that contacts have to this address.

Viewing Internal Contacts

This section discusses how to view internal contacts.

Page Used to View Internal Contacts

Page Name	Object Name	Navigation	Usage
Contact Directory	WC_CONTACT_DIR	Customer Care, Internal Contacts	View the names and contact information of people in an organization who are available for customers to contact for assistance.

Sending Contact Us Messages

This section discusses how to send Contact Us messages.

Page Used to Send Contact Us Messages

Page Name	Object Name	Navigation	Usage
Contact Us	WC_CONTACT_US	Contact Us	Self-service users can send messages to your organization.

Sending Contact Us Messages

Access the Contact Us page.

Contact Us

Contact Us by Email

*Customer: Adventure 54

*Name: JimD,JimD

Email Address: jimd@adventure54.com

Would you like a confirmation email?

☐ Yes

☒ No

Please select the Subject and Topic for proper routing.

Subject: Comments/Information

Topic: Complaint

Message:

Send

Live Chat with Agent

Subject: Testing Subject 1

Question:

Get Auto-answer

Contact Us page

Each subject-topic combination is associated with a workflow action that you specify. The workflow action sends a notification that alerts the recipient to the newly submitted message.

If you use the 360-Degree View feature, the system creates an interaction when the user sends the message. In this situation, the notification normally includes a link to the new interaction.

If the user requests a confirmation email, the system sends a message based on the Contact Confirmation email template. You cannot choose a different template for the confirmation email. You can, however, modify the text of the template.

Live Chat with Agent

Expand this page region and click the Get Auto-answer button to initiate a two way chat session with a support agent.

See Also

[Chapter 19, “Setting Up Customer Self-Service,” page 265](#)

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

PeopleSoft Enterprise CRM Portal Pack 8.9 PeopleBook, “Working with CRM Self-Service Pagelets”

Registering Products

This section discusses how to:

- Register products.
- Enter product registration information.

Pages Used to Register Products

Page Name	Object Name	Navigation	Usage
Product Registration	RF_PROD_REG_SRCH	Product Registration	Register new or existing products.
Product Registration - Product Registration Details	RF_PROD_REG_DET	Click a product link in the Your Existing Products group box or the New Product group box (after locating the product from product catalogs) on the Product Registration page.	Enter product registration information.

See Also

Chapter 19, “Setting Up Customer Self-Service,” Setting Up Product Registration, page 272

Registering Products

Access the Product Registration page.

Product Registration

Select an existing product in the Installed Product Hierarchy to view or modify the registration details, or select a new product to register.

No installed products meet the search parameters.

Find your product in the Product Catalog

Product Catalog

[Camping Catalog](#)

[Skiing Catalog](#)

Product Registration page

The Product Catalog group box lists the catalogs that you can use for product registration. Depending on how a catalog is set up, you can view a simple list of products, a list of product categories, or both. Regardless of whether you need to browse through different levels to find a product, click a product link to access the Product Registration - Product Registration Details page and submit the product registration.

Note. In addition to registering products in PeopleSoft CRM self-service, users can also contact CSRs, who can register products for customers through the 360-Degree View.

See Also

Chapter 18, “Using the 360-Degree View,” page 253

Entering Product Registration Information

Access the Product Registration Details page.

Product Registration Details page

The Registration group box displays the name of the product that you selected from the catalog, as well as the installed product fields that you selected during setup to appear for product registration purposes. Administrators can define the fields that appear on this page by using the Product Registration Setup page. Modify these fields for a specific product on the Installed Product page in the Product Definition component. Also, when defining these fields, you can specify whether a user can modify the field value on existing installed products.

In this example, self-service users can enter the serial ID, purchase date, site, location details, and comments for the registration. When the product registration is submitted successfully, a record of it with the date of registration appears in the Your Existing Product group box. The system updates the associated installed product with the information that the user entered during product registration. If it is a new product, the system creates an installed product with a status of *Installed*.

Submit

Click to submit and save the product registration. The system automatically populates the registered date with the current system date when you submit the registration.

Cancel and Return

Click to return to the Product Registration page.

PART 6

Relationship Management

Chapter 21
Working with Contacts

Chapter 22
Working with Tasks

CHAPTER 21

Working with Contacts

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

- Manage contacts.
- Maintain contact groups.
- Work with call reports.

Understanding Contact Management

Contact management enables salespeople (or relationship managers) to manage contacts, tasks, and calendars across all of their accounts by using an easy and intuitive user interface. Relationship managers can:

- Add system contacts to their list.
- Create and manage contact groups.
- Send an email message to selected contacts.
- Create tasks, schedules, and call reports for selected contacts.

This feature focuses on shared contacts. The contacts entered and viewed are enterprise contacts and do not include a user's personal contacts or contacts that are private in any manner. This means that all users can access the contacts and can add the same contacts to their list.

To add private data for a contact that is visible only to you, use the user-defined fields on the Person component.

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

Contact management is widely used in industries that support business-to-business (B-to-B), high net worth business-to-consumer, and team selling environments, such as financial services and insurance.

Call Reports

Sales call reports document a contact event such as a meeting, demonstration, or phone call. They are always produced after the event and are follow-up memos documenting the attendees and what took place during the event.

Contact Management Toolbar

PeopleSoft CRM provides a toolbar that is on every contact management page. This toolbar enables you to transfer between contact management pages and perform commonly used actions for your contact list. You can also access your accounts, tasks, and calendars by using the toolbar.

See Also

PeopleSoft Enterprise Sales 8.9 PeopleBook, “Managing Sales Leads and Opportunities”

Chapter 22, “Working with Tasks,” page 319

Chapter 15, “Using Calendars,” page 205

Managing Contacts

This section lists the pages used to manage contacts and discusses how to:

- Access contacts.
- Add existing contacts to the My Contacts list.
- Add contacts to the system.

Pages Used to Manage Contacts

Page Name	Object Name	Navigation	Usage
My Contacts	RD_CONTACTS	My Contacts	Access contacts to perform various actions for the contacts.
Send Notification	RD_EMAIL_CNTCT	Select <i>Email</i> in the Action field on the My Contacts page.	Send an email to one or more contacts.
My Contacts - Search Contacts	RD_IMPORT_CONTACTS	Click the Search Contacts button on the My Contacts toolbar.	Search for contacts that are already defined in the system and select one or more to add to the My Contacts list.
Remove Contacts	RD_REMOVE_CNTCT	Select one or more listed contacts. <ul style="list-style-type: none"> • Click the Remove Contacts button on the My Contacts toolbar. • Select Remove Contact(s) from the Action drop down list and click the Go button. 	Remove one or more contacts from the My Contacts and all contact groups to which the contact belongs.
Person	RD_PRIMARY	Click the Add Contact button on the My Contacts page.	Add a contact to the system.
View Groups	RD_VIEW_GRP	Click the Group Management button on the contact management toolbar.	View the groups where this contact is a member.

Accessing Contacts

Access the My Contacts page.

***View Contacts** All My Contacts Advanced Filter

A | B | C | D | E | F | G | H | I | J | K | L | M | N | O | P | Q | R | S | T | U | V | W | X | Y | Z | All

Contacts Customize Find View All First 1-10 of 21 Last

Primary

Select	Last Name	First Name	Company	Title	Phone	Email Address
<input type="checkbox"/>	Albright	Fred	MMA Property Management Group	Repair Technician	800/987-4563	falbright@mma.com
<input type="checkbox"/>	Aluri	Ahmed	Haas Engineering	Support Manager	001-555/421-9020	aaluri@haaseng_psft.com
<input type="checkbox"/>	Arb	Susan	Shoreview Medical	Cafeteria Director	001-555/367-4000 (4231)	susan_arb@shoreview_psft.com
<input type="checkbox"/>	Bailey	Alan	MMA Property Management Group	Sales, Field Rep	925/694-2001	aklcrm@yahoo.com
<input type="checkbox"/>	Barnes	Norville	Hudsucker Industries	Engineer	001-415/556-7000 (333)	Barnes@hudsucker_psft.com
<input type="checkbox"/>	Bazil	Julie	Haas Engineering	Admin	001-555/444-1231	julie@haaseng_psft.com
<input type="checkbox"/>	Brent	Gavin	Johnson Medical Instruments	Electrical Engineer	001-555/508-0800 (4002)	gavin_brent@johnson_psft.com
<input type="checkbox"/>	Granger	Jennifer	Johnson Medical Instruments	Building Manager	001-555/508-0800	jgranger@johnson_psft.com
<input type="checkbox"/>	Gunderson	Marqe	Coen Food Service	Planning Manager	001-310/445-9934 (244)	mgunderson@coen_psft.com
<input type="checkbox"/>	Hauser	Bill	MMA Property Management Group	Property Management Associate	800/987-4563	

☐ Check All / Clear All

Action Go

Add Contact

My Contacts page

Use the letters that appear below the View Contacts field as an index to select the starting letter of the contact names to view. You can modify the way the index appears: for example, you might define the index letters as *A-C*, *D-F*, and so forth.

See [Chapter 3, “Setting Up General Options,” Defining Alpha Indexes, page 33](#).

View Contacts

Select a contact group to view.

Advanced Filter

Click this link to enter additional criteria by which you can filter the contact list.

Select

Select one or more contacts for which to perform a specified action.

Check All / Clear All

Select to select all listed contacts or to clear all selected contacts.

Note. This option selects or clears only the contacts on the page that currently appears.

Action

Select the action to perform for the selected contacts.

For example, if you select *Email Contact(s)*, then an email page that is pre-addressed to all of the selected contacts appears.

Actions are:

- *Add Call Report for Contact(s)*
- *Add Contact(s) to Group*
- *Add Task for Contact(s)*
- *Email Contact(s)*
- *Remove Contact(s)*

Security Considerations

The system provides safeguards against users viewing contact information for which they are not authorized:

- For users that do not have access to all companies that are defined in the system, the company column is blank.
- For users that do not have access to worker information, the worker home phone and worker home address columns are blank, even if they are visible to other users.

Entering Additional Filtering Criteria

Click the Advanced Filter link.

My Tasks: Search page

Enter one or more search criteria to filter the results by the criteria entered.

Note. Unless the signed-on user has access to all companies, they aren't able to search for a contact based on the company criteria.

Show in Results

Select one or more roles to display only contacts for which you have the selected role(s). For example, select *View as Account Owner* to show only the contacts for customers where you are the account owner.

Modifying Columns that Appear on the Contacts List

To modify the columns that appear on the Contacts list, click the Customize link.

The screenshot shows a web interface titled 'Contacts' with a sub-header 'Personalize Column and Sort Order'. Below the header, a text box states: 'To order columns or add fields to sort order, highlight column name, then press the appropriate button. Frozen columns display under every tab.' The interface is divided into two main sections: 'Column Order' and 'Sort Order'.

Column Order: A list box containing the following items: 'Tab Primary (frozen)', 'Select (frozen) (column 6)', 'Last Name', 'First Name', 'Company', 'Title', 'Phone', 'Email Address (column 16)'. To the right of this list are two buttons: 'Hidden' and 'Frozen', each with a corresponding icon (a square with a diagonal line for 'Hidden' and a square with a dot for 'Frozen').

Sort Order: An empty list box. To its right are two buttons: 'Descending' (with an icon of a square and an 'X') and an icon of a square with a dot.

My Contacts: Contacts page

The columns that appear on the My Contacts list are shown in the Column Order list box. You can select a column and rearrange its order, hide it, or use it as a sort column.

Some predefined columns (Home Address, Address, State, Postal, Employer, Cell phone, and Home Phone) are not included in the column order and sort order that appear on this page. To set up the contact list so that you can view those columns, click the Personalize Filter link on the Advanced Filter page.

Personalizing the Search Filter

Click the Personalize Filter link on the Advanced Filter page.

Personalize Filter Settings

Search Button Position

☐ Top
 ☒ Bottom
 ☐ Both Top and Bottom

Advanced / Basic Lookup

If no previous Search Definition is being reloaded, then default to:

Basic Lookup

Collapse the Search Section?

☐ Show Collapsed When Page Opens

Results Grid Initialization

☐ Populate the grid automatically, apply the most recently used criteria
☐ Populate the grid automatically, apply my default saved search

☒ Do not populate the grid

Personalize Filter Settings page (1 of 2)

Select Search Fields to Display	Select Search Result Columns to Display
<input checked="" type="checkbox"/> First Name	<input checked="" type="checkbox"/> Phone
<input checked="" type="checkbox"/> Last Name	<input checked="" type="checkbox"/> 360 Degree View
<input checked="" type="checkbox"/> Company	<input checked="" type="checkbox"/> Last Name
<input checked="" type="checkbox"/> City	<input checked="" type="checkbox"/> First Name
<input checked="" type="checkbox"/> State	<input checked="" type="checkbox"/> Company
	<input checked="" type="checkbox"/> Email Address
	<input checked="" type="checkbox"/> View Groups
	<input type="checkbox"/> Home Address
	<input type="checkbox"/> Address
	<input type="checkbox"/> State
	<input type="checkbox"/> Postal
	<input type="checkbox"/> Employer
	<input type="checkbox"/> Cell Phone
	<input type="checkbox"/> Home Phone

Personalize Filter Settings page (2 of 2)

Adding Existing Contacts to the Contacts List

Access the My Contacts - Search Contacts page.

My Contacts

Search Contacts

First Name begins with Teri

▼ **Contacts** Find | View All | First ◀ 1-2 of 2 ▶ Last

Select		Last Name	First Name	Company	Title	Phone	Email Address
<input type="checkbox"/>		Thomas	Teri	MMA Property Management Group	Management Associate	651/785-2546	tthomas@mma.com
<input type="checkbox"/>		Katen	Teri	IMC, Inc	Support Manager	612/340-1212 (332)	tkaten@imc3.com

☐ Check All / Clear All

▼ **Search**

Use Saved Search

First Name begins with Teri

Last Name begins with

Company begins with

Phone begins with

Email begins with

[Advanced Search](#) [Save Search Criteria](#) [Delete Saved Search](#) [Personalize Search](#)

Search Contacts page

This page initially appears with only the search fields visible. The results of the search appear in the contacts list. You can select one or more contacts to add to the My Contacts list.

Adding Contacts to the Contact List from Other Components

You can also add contacts to the contact list from the contact list from these components: 360 Degree View, Person, Company, and Site.

To automatically insert contacts to the contact list, specify *Yes* in the Auto Insert to My Contacts field that is available on the Sales page of the User Preferences component. If this flag is set for a user, a system contact that is added to the contacts for a customer of the user on the Company, Site, Person, Lead, or Opportunity components is automatically added to the My Contacts page for the user.

Adding Contacts to the System

Access the Person page.

When you access the Person page from the contact management toolbar, any contact that you add to the system is automatically added to your contact list.

See Also

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, “Defining Person Business Objects”

Maintaining Contact Groups

This section lists the pages used to manage contact groups and discusses how to:

- Update contact groups.
- Add contacts to a contact group.
- Maintain group membership.
- Search for contacts.

Pages Used to Maintain Contact Groups

Page Name	Object Name	Navigation	Usage
Group Management	RD_GROUP_MGT	My Contacts Click the Group Management toolbar button.	Manage contact groups.
Group Selections	RD_CNTCT_GRP	My Contacts Select <i>Add Contacts to Group</i> in the Action field.	Add or remove contacts of a contact group.
Group Information	RD_GROUP_MGT	<ul style="list-style-type: none"> • Click the name of an existing group on the Group Management page. • Click the Add Group button on the Group Management page. 	Maintain groups and group membership.
Search Contacts	RD_SRCH_CNTCT_SEC	Enter criteria in the First Name or Last Name fields on the Group Information page and click the Select button.	Search for contacts to add to a contact group. The search from this page is limited to the contacts that are on your contact list.

Managing Contact Groups

Access the Group Management page.

My Contacts

Group Management

Groups

Group Name	
Premier References	
User Group	
Haas WalkIn Project	

[Return to My Contacts](#)

Group Management page

Group Name Click a listed group to open the Group Information page for the group.

Add a Group Click this button to

Adding or Removing Contacts of a Contact Group

Access the Group Selections page.

My Contacts

Group Selections

Please select an existing group, or create a new group for selected Contact(s)

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

Group Name	
Premier References	<input type="button" value="Select"/>
User Group	<input type="button" value="Select"/>
Haas WalkIn Project	<input type="button" value="Select"/>

Group Selections page

Select Click this button to access the Group Information page where you can add or remove contacts of the group.

Maintaining Groups and Group Membership

Access the Group Information page.

My Contacts

Group Information

Group Details

***Group Name** Premier References ***Description** Premier References

Member(s) Find | View All | First 1-2 of 2 Last

Contact Name	Company	Phone	Email	
Jack Pepper	Shoreview Medical	001-555/441-3310	jpepper@pepperhousehold_psft.com	
Jerry Lundegaard	Coen Food Service	001-310/445-9934(443)	jlundegaard@coen_psft.com	

New Member Find | View All | First 1-2 of 2 Last

Contact Name	Company	Phone	Email	
Julie Bazil	Haas Engineering	001-555/444-1231	julie@haaseng_psft.com	
Gavin Brent	Johnson Medical Instruments	001-555/508-0800(4002)	gavin_brent@johnson_psft.com	

Add Group Member

First Name Last Name Select Select Contact Groups

Save Cancel and Return to Group Selections

Group Information page

Searching for Contacts

Access the Search Contacts page.

My Contacts

Search Contacts

Enter Search Criteria and Press Search

First Name Last Name B Search

Select Contacts Customize | Find | View All | First 1-3 of 3 Last

Select	Contact Name	Phone	Email Address
<input type="checkbox"/>	Gavin Brent	001-555/508-0800(4002)	gavin_brent@johnson_psft.com
<input type="checkbox"/>	Julie Bazil	001-555/444-1231	julie@haaseng_psft.com
<input type="checkbox"/>	Norville Barnes	001-415/556-7000(333)	Barnes@hudsucker_psft.com

Add Selected to Group

[Return to Group Information](#)

Search Contacts page

This page searches your existing contacts for contacts to add to a contact group. For a contact to appear on this list, you must add the contact to the Contacts list on the My Contacts page.

- First Name and Last Name** Enter the first and last name for which to search. If you enter a partial string, the system searches for all contacts whose first or last name begins with the character(s) that you enter.
- Add Selected to Group** Click this button to add the selected contacts to the contact group.

Working with Call Reports

This section discusses how to:

- View call report lists.
- Add call reports.

Pages Used to Work with Call Reports



Page Name	Object Name	Navigation	Usage
Call Reports	RD_CALL_REPORT	Select one or more contacts on the My Contacts page. <ul style="list-style-type: none"> • Click the Add Call Report toolbar button. • Select <i>Add Call Report for Contact(s)</i> in the Action field. 	Add a call report.
Call Reports	RD_CALLRPT_LST_TXN	<ul style="list-style-type: none"> • Customers CRM, Search Company, Company Select the Call Reports tab. • Partners CRM, Search Partner Company, Partner Company Select the Call Reports tab. 	View a list of call reports for a company or partner company.
Call Reports	RD_PRSN_CALL_RPTS	Customers CRM, Search Person, Person Select the Call Reports tab.	Add a call report or view a list of call reports for a consumer or contact.

Adding Call Reports

Access the Call Report page.

My Contacts
Call Report Generate Report



General Information

*Subject Date 05/12/2004 
 *Event Type Meeting  Location


Notes Summary


No Notes or Attachments have been added to this Call Report.


Add a Note




Added On 05/12/2004 4:48PM Terry Murphy Start Date  End Date 



Note Summary
 Note Details





Apply Note  Add an Attachment

Contacts Customize Find  First  1-2 of 2  Last

Select	Last Name	First Name	Phone	Email Address	Company	
<input type="checkbox"/>	Aluri	Ahmed	001-555/421-9020	aaluri@haaseng_psft.com	Haas Engineering	
<input type="checkbox"/>	Hernandez	Gina	408/745-7827	ghernandez@coolsolutions_psft.com	Cool Solutions	

☐ Check All / Clear All
☐ Email Call Report Email Call Report

Add Contact

First Name Last Name Select Select Contact Groups

Follow-up Tasks

No Follow-up Tasks have been added.

Call Report page

General Information

Enter information that describes the event.

Notes Summary

Enter notes and attachments that relate to the event.

See [Chapter 5, “Working with Notes and Attachments,” page 111](#).

Contacts

View the list of contacts that attended the event and add contacts.

Email Call Report

Select one or more contacts and click this button to email the call report to the selected contacts.

Note. You must save a call report before you can email it.

Follow Up Tasks

View the list of tasks associated with the event. When you create a follow up task for a call report, its contacts are assigned as the contacts for the task by default.

See [Chapter 22, “Working with Tasks,” page 319](#).

Viewing Call Report Lists

Access the Call Reports page.

The screenshot displays the 'Search' section of the Call Reports interface. It includes a 'Use Saved Filter' dropdown menu. Below this, several filter criteria are listed: 'Subject' (begins with), 'Task Type' (=), 'Task Status' (not in), 'Task Priority' (=), 'Start Date' (=), and 'End Date' (=). The 'Task Status' dropdown is expanded, showing 'CMPL, CNCL'. At the bottom, the 'Show in Results' section contains three checked checkboxes: 'Tasks as Assignee', 'Tasks as Owner', and 'Tasks as Sales Manager'.

Call Reports: Search page

Select a call report to view details. You can also add a call report from this page.

CHAPTER 22

Working with Tasks

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

- Set up task management.
- Create tasks.
- Manage tasks.
- View calendars.
- Manage meetings.

See Also

[Chapter 21, “Working with Contacts,” page 305](#)

Understanding Task Management

Task management enables users to plan and manage the day-to-day activities that are associated with managing sales, service, and support activities.

Tasks are associated with workflow items that are triggered by PeopleSoft CRM transactions, such as leads and opportunities or cases in field service and support. If a transaction triggers a workflow item that assigns a task to a user, then that task appears in the user’s task list and the user’s calendar. If the task is for a meeting, the task appears in the user’s meeting list. Task lists, calendars, and meeting lists are accessed using the My Tasks, My Calendar, and My Meetings pages.

Users can access their task list directly from the left-hand menu or by clicking a toolbar button that is available on the My Contacts, My Calendar, and My Meetings pages. Additionally, users can view tasks that are associated with a transaction or component from the Tasks page that is available on the following components.

- Lead
- Opportunity
- Person
- Company
- Strategic account management
- Change Management
- 360-degree view

Details of a task that appears on the My Tasks, My Calendar, or My Meetings page are available by clicking the task name.

Task Types

PeopleSoft CRM provides these task types out-of-the-box.

- Appointment
- Meeting
- Phone call
- Reminder
- To-do

You can also set up additional task types.

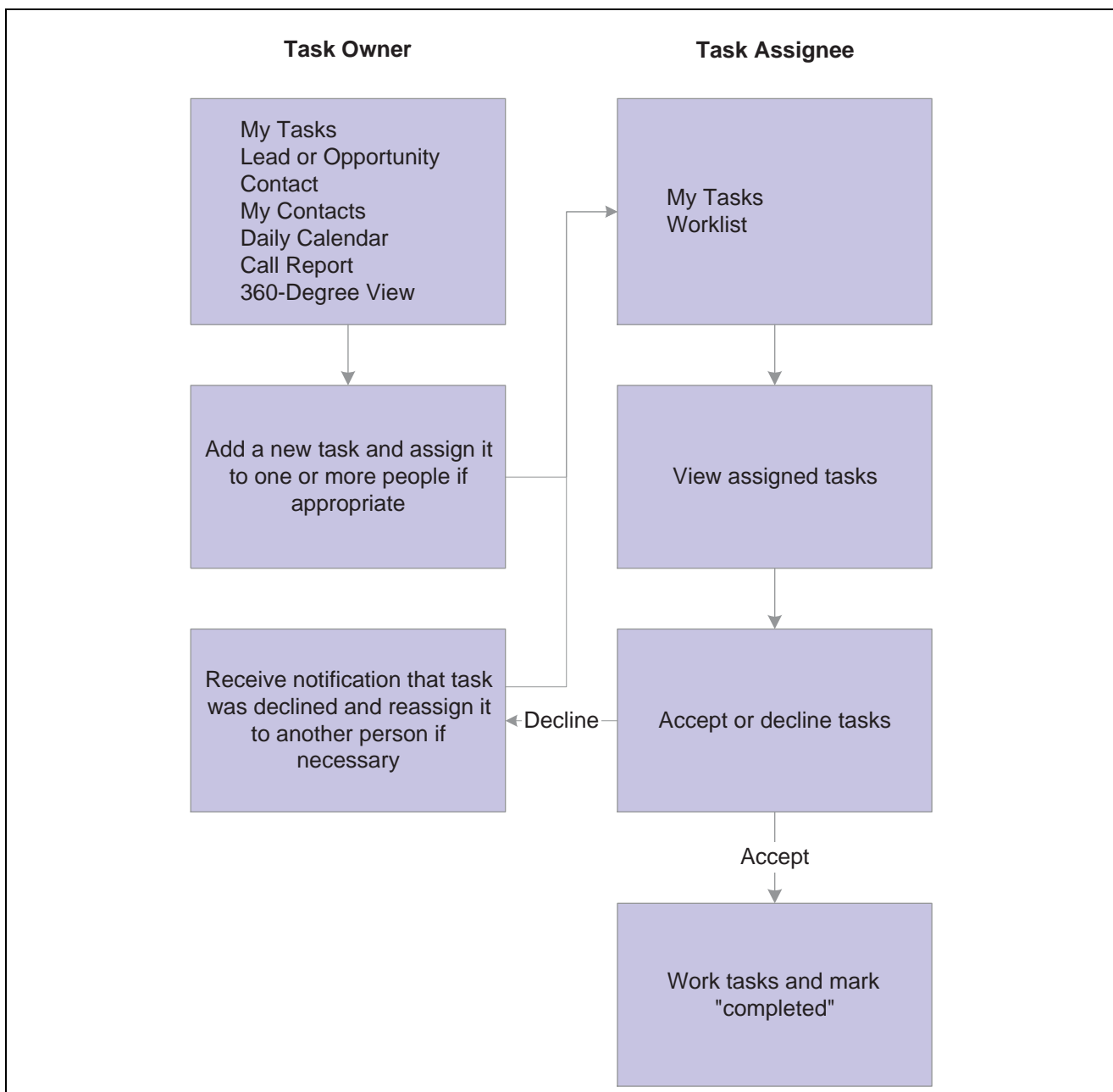
See [Chapter 22, “Working with Tasks,” Setting Up Task Management, page 322](#).

Task Management Process

A task owner creates a task and assigns it to one or more persons. A notification is then sent to each of the assignees that a task is assigned to them, and the task appears in the assignee’s task list. The assignee can either accept or decline the task. The owner is notified when the assignee marks the task as completed.

The task owner can reassign a task for any of the assignees. An assignee can reassign a task that is assigned to them. When a task is reassigned, a notification is sent to the new assignee that the task is assigned to them. When the new assignee accepts or declines the task, the owner is notified.

This diagram shows the task management process:



Task Management Process Flow

See Also

PeopleSoft Enterprise Sales 8.9 PeopleBook, “Managing Sales Leads and Opportunities”

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook,
“Defining Company Business Objects”

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, “Defining Person Business Objects”

Chapter 4, “Setting Up PeopleSoft Customer Relationship Management Security and User Preferences,” Setting System-Wide Security Options, page 56

Chapter 18, “Using the 360-Degree View,” page 253

Setting Up Task Management

To set up task management, use the Task Priority (RB_TSK_PRIORITY) and Task Type (RB_TSK_TYPE) components.

This section lists the pages used to set up task management and discusses how to:

- Define task types.
- Define task priorities.
- Define task group templates.

Pages Used to Set Up Task Management

Page Name	Object Name	Navigation	Usage
Task Type	RB_TSK_TYPE	Set Up CRM, Common Definitions, Task Management, Task Type	Define task type codes that enable the user to categorize tasks.
Task Priority	RB_TSK_PRIORITY	Set Up CRM, Common Definitions, Task Management, Task Priority	Define task priority codes that enable the user to designate a priority for tasks.
Task Group Templates	RB_TSK_GRP_TPL	Set Up CRM, Common Definitions, Task Management, Task Group Template	Define task group templates. These are group-related tasks and are used by Change Management.

Defining Task Types

Access the Task Type page.

Task Type

Task Type

*Task Type: MEETING

*Description: Meeting

*Application Usage: All Applications

*To Accept Task: All Assignees Accept Task

☒ Active

☐ Pencil In (Mark as free Time)

☒ Show Repeating Options

☒ Show Assigned to Grid

☒ Show Contacts Grid

☒ Show Task in Task List

☒ Record Attendance

☒ Remind Me

☐ Do not show in Calendar

Label for Assigned to Grid: 2325 Invitees

Label for Contacts Grid: 2321 Contacts

Calendar Image: PS_STATUS_TASK_MEETING

Comments:

Field Display Options

☒ Start Date Required

☒ Start Time Required

☒ End Date Required

☒ End Time Required

☐ Location Required

☒ Start Date Visible

☒ Start Time Visible

☒ End Date Visible

☒ End Time Visible

☒ Location Visible

PIM Integration Options

Outlook Task Type: Calendar

Lotus Notes Type: Meeting

Task Type page

Task Type

The options you select on this page control the options that are available on the Task Detail page.

Task Type	Enter the type of the task.
Application Usage	Select the application where the task type is used. A value of <i>All Applications</i> indicates a universal type that is available to all applications.
Active	Select to make the task type active. Users can only create tasks for active task types.
To Accept Task	Select to indicate whether all of the assignees need to work on the task or only one assignee needs to work on the task when the task is assigned to multiple people.
Pencil In (Mark as free Time)	Select to indicate that the task duration is not treated as busy time by the Assignment Engine.
Record Attendance	Select to enable recording of attendance. If this is selected, the Task Details page shows a column of check boxes in the Invitee/Assignee grid for users to indicate whether the Invitee/Assignee attended the meeting. This check box is usually selected for meeting task types.

Show Repeating Options	Select to enable the user to select the frequency and time period in which this task repeats.
Do not show in Calendar	Select this option to suppress the task from the user's calendar. This option is deselected by default.
<hr/>	
Note. The task appears in the user's calendar only if this option is deselected <i>and</i> the user enters a start and end date and time for the task.	
<hr/>	
Show Assigned to Grid and Label for Assigned to Grid	Select to have the assigned to grid appear on the Task Detail page. If you select Show Assigned to Grid, then the Label for Assigned to Grid field becomes enterable for you to change the grid label that appears on the Task Details page. By default, the label that appears is <i>Assigned To</i> .
Show Contacts Grid and Label for Contacts Grid	Select to have the contacts grid appear on the Task Detail page. If you select Show Contacts Grid, then the Label for Contacts Grid field becomes enterable for you to change the grid label that appears on the Task Details page. By default, the label that appears is <i>Contacts</i> .
Show Task in Task List	Select to have the task appear in the task list for the task owner and all assigned users.
Calendar Image	Enter the name of the image that identifies the task type in the task list and calendar.

Field Display Options

Start Date Required, End Date Required, Start Time Required, End Time Required, and Location Required	Select the fields that are required for this task type.
Start Date Visible, End Date Visible, Start Time Visible, End Time Visible, and Location Visible	Select the fields that are visible for this task type. If you indicate that a field is required, you must also indicate that it is visible. However, a field can be visible but not required.

PIM Integration Options

Select the task type that displays on a PIM (personal information managers) for this task type. You can specify task types for integration with Outlook and with Lotus Notes.

See *PeopleSoft Enterprise Infosync Client 8.9 PeopleBook*, "Setting Up Integration Between PeopleSoft CRM and PIM Clients".

Defining Task Priorities

Access the Task Priority page.

Task Priority

Customize | Find | First 1-3 of 3 Last

*Code	Default	Active	*Long Description	*Short Description	Image Name	Image	
1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	High	High	PS_STATUS_URGENT_I	!	+
2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Medium	Medium			+
3	<input type="checkbox"/>	<input checked="" type="checkbox"/>	Low	Low			+

Task Priority page

- Code** Enter a code to identify the task priority.
- Default** Select one priority as the default for all tasks.
- Active** Select to indicate that this task priority is active. Only active priorities are available to assign to tasks.
- Image Name** Select the image that represents the priority visually. If defined for a task priority, his image appears on the My Tasks list for each task that has that priority.

See Also

[Chapter 22, “Working with Tasks,” Creating Tasks or Updating Task Details, page 328](#)

Defining Task Group Templates

Access the Task Group Template page.

Task Group Template

Task Group

Task Group Template ☒ **Active**

Application Usage

***Description**

Customize | Find | First 1-3 of 3 Last

*Task Type	*Priority	Task Owner	Assigned To	Location	Description		
Change Activ	High				Installation	+	-
Change Activ	High				Test Install	+	-
Change Appr	High				Installation Acceptance	+	-

Task Group Template page

Task group templates ensure that all tasks that must be completed to accomplish a goal are assigned. For example, the task group Install Hardware might consist of three tasks: Installation, Test Install, and Installation Acceptance. This is particularly useful when the tasks are performed by different people with different reporting relationships.

When a user schedules a task group, the task group template creates and assigns each task within the group.

Application Usage	Select from <i>All Applications</i> , <i>Change Management</i> , <i>Field Service</i> , <i>Sales</i> , and <i>Strategic Planning</i> .
Task Type, Priority, Task Owner, Assigned To, and Location	Specify the default task type, priority, assignee, and location of each tasks that is part of the task group. You can modify these default values at runtime.

Managing Tasks

This section lists common elements and discusses how to:

- View task lists.
- Create tasks or update task details.
- View or update task notes.

Common Elements Used in this Section

History	The History drop-down box displays a list of the task management pages that you accessed during the current session. Select a listed page to transfer to that page.
----------------	---

Pages Used to Manage Tasks

Page Name	Object Name	Navigation	Usage
My Tasks	RB_TSK_MY_TASKS	My Tasks	View the list of tasks that are assigned to you. You can select a task and view its details or add a task.
Task Details	RB_TSK	<ul style="list-style-type: none"> • Click a listed task on the My Tasks page. • Click the Add Task toolbar button on the My Task page. • Select a task type and click the Add Task button on the My Tasks page. 	Create a task or update task details.
My Tasks - Notes	RB_TSK_NOTE	Select the Notes tab on the Task Details page.	View or add notes to a task.
Transactions for the Task	RB_TSK_TXNS	Click the View or Link Transactions link on the Task Details page.	Link related transactions to a task.

Viewing Task Lists

Access the My Tasks page.

My Tasks

My Accounts | My Contacts | My Calendar | Add Contact | Add Task | » [Personalize](#)

Tasks: **Tasks This Month** [Advanced Filter](#)

My Tasks						Customize	Find	View All	First	1-8 of 8	Last
	Subject	My Status	Task Status	Location	Start Date	Contact					
	Meet to Discuss Project		Open		05/03/2004	Ahmed Aluri					
	Monthly Status Meeting With Jack Pepper		Open	Conference Call	05/04/2004	Jack Pepper					
	Account Reviews		Open	Office	05/11/2004						
	Set up Exec Meeting		Open	Test Location	05/11/2004	Vic Tenneta					
	Send Hudsucker Stats		Open		05/12/2004	Norville Barnes					
	Customer Dinner		Open	Boulevard Restaurant	05/13/2004	Waring Hudsucker					
	Send Latest Haas Stats		Open		05/24/2004	Ahmed Aluri					
	Doctor's Appointment		Open		05/26/2004						

*Task Type: **Meeting** [Add Task](#)

My Tasks page

The task priority indicator appears in left most column on this page, if the default priority is not assigned to the task. The task type icon appears in the column immediately to the left of the subject column.

See [Chapter 22, “Working with Tasks,” Defining Task Priorities, page 324](#) and [Chapter 22, “Working with Tasks,” Defining Task Types, page 322](#).

Tasks

Select a filter to view only tasks that meet the filter criteria. The available filters are:

- *All Open Tasks*
- *Meetings This Week*
- *Meetings Today*
- *Overdue Tasks*
- *Tasks This Month*
- *Tasks This Week*
- *Tasks Today*
- *Tasks Tomorrow*

Advanced Filter

Select to enter additional filtering criteria.

My Status

Indicates whether the task is assigned to you and whether you accepted or rejected the task

Task Status

Indicates the task status.

Contact

Displays the primary contact for the task or meeting.

Task Type

Select a task type to add.

Add Task

Click to add a task of the selected type.


Entering Additional Filtering Criteria

Click the Advanced Filter link.

The screenshot shows the 'My Tasks: Search page' with a 'Search' section. It includes a 'Use Saved Filter' dropdown, a 'Subject' field with a 'begins with' dropdown, a 'Task Type' field with an '=' operator and a 'Meeting' dropdown, a 'Task Status' field with a 'not in' operator and a list of statuses 'CMPL, CNCL', a 'Task Priority' field with an '=' operator, a 'Start Date' field with a 'between' operator, dates '05/23/2004' and '05/29/2004', and an 'End Date' field with an '=' operator. Below these is a 'Show in Results' section with three checked checkboxes: 'Tasks as Assignee', 'Tasks as Owner', and 'Tasks as Sales Manager'. At the bottom are buttons for 'Search', 'Clear', 'Basic Filter', 'Save Filter Criteria', 'Delete Filter Criteria', and 'Personalize Filter'.

My Tasks: Search page

Enter one or more search criteria to filter the results by the criteria entered.

Task Status prompt 

Click to display a list of task statuses. Choose one or more statuses to filter the task list by those statuses.

Show in Results

Select one or more roles to display only tasks for which you have the selected role(s).

Creating Tasks or Updating Task Details

Access the Task Details page.

Task Details History Select One...

Save | Add New Task | Next in List | Previous in List | My Accounts | My Contacts | >> Personalize

Status Open **Task Subject** Account Reviews
Start Date 04/13/2004 **End Date** 04/13/2004
Owner Burt Lee

Task Details Notes

Task Details

***Subject** Account Reviews ***Task Type** Meeting

***Status** Open ☐ **Private** ***Priority** Medium

***Start Date** 04/13/2004 ***Start Time** 2:00PM **Time Zone** PST

***End Date** 04/13/2004 ***End Time** 4:00PM **Location** Office

***Owner Name** Burt Lee

Repeats Does Not Repeat [View or Link Transactions](#)

Reminder

Description

Task Details page (1 of 2)

Invitees Customize | Find | First 1 of 1

Name	Role	Telephone	Status	Attendance
Terry Murphy	Worker		Assigned	

First Name **Last Name** Add

Contacts Customize | Find | First 1-3 of 3

Name	Role	Telephone	Primary
Alex Ash	Worker		<input type="checkbox"/>
Alan Lee	IMC, Inc	612/340-1412	<input type="checkbox"/>
Jack Pepper		555/441-3310	<input type="checkbox"/>

First Name **Last Name** Add

Task Details page (2 of 2)

Task Details

Subject

Enter the meeting subject that appears on the My Tasks list.

Task Type

Select a task type if you access this page from the toolbar. If you access this page from the My Tasks page, the task type you select on the My Tasks page appears here.

Status

Select the status of the task from the statuses that appear in the drop down list: *Cancelled*, *Completed*, *In Progress*, and *Open*.

Private

Select to indicate that the task details are private—viewable only to the task owner and the assignees.

Start Date, Start Time, End Date, and End Time	Enter the starting and ending dates and times of the meeting.
Owner	Enter the name of the task owner. The owner might not actually perform the task, but is responsible for task completion.
View or Link Transactions	Select to add transactions that are related to the task. When you click this link, the Transactions page appears for you to select a transaction to view.

<Invitees / Assignees>

The label of this grid changes depending on the task type. As delivered, the label is *Invitees* for task type Meeting and *Assigned To* for task types Activity, Approval, and Mtg. This section does not appear for other task types.

You can add this grid to task types or modify its label by using the Task Type page.

Name	Enter the name of the person to whom the task is assigned or who is invited to the meeting.
Role	Select the person's role.
Status	Indicates the status of the task assignee— <i>Assigned</i> , <i>Accepted</i> , or <i>Declined</i> .
Attendance	Select <i>Absent</i> or <i>Attended</i> . This field is available only if you select Record Attendance on the Task Type page.

Contacts

Primary	Select to indicate that the contact who is listed in the row is the primary contact for this task. There is only one primary contact for a task, and the primary contact name appears for the task when it is listed on the My Tasks page.
----------------	--

Adding Persons

To add a person to either the Invitees grid or the Contacts grid, enter a first and last name below the grid and click the Add button. If the first and last name do not uniquely identify a person, the Search Contacts page appears. Select one or more listed persons and click Add Persons to Task. The selected persons are added to the task and you are transferred back to the Task Details page. You can also enter new search criteria or return to the Task Details page without making any selections.

Task

Search Contacts

Enter Search Criteria and Press Search

First Name Last Name

Select Contacts [Customize](#) | [Find](#) | [View All](#) | First 1-3 of 3 Last

Select	Contact Name	Phone	Email Address
<input type="checkbox"/>	Ted Pepper	925/254-2839	tpepper@sofgear_psft.com
<input type="checkbox"/>	Ted Thompson	555/222-1000	tthompson@yinx_psft.com
<input type="checkbox"/>	Ted Powell		

[Return to Task](#)

Search Contacts page

Re-Assigning Tasks

The task owner and assignee can reassign the task by changing the person name in the assignee box.

See Also

Chapter 22, “Working with Tasks,” Setting Up Task Management, page 322

Viewing or Updating Task Notes

Access the My Tasks - Notes page.

See [Chapter 5, “Working with Notes and Attachments,” page 111](#).

Linking Transactions to a Task

Access the Transactions for the Task page.

Transactions for the Task [Customize](#) | [Find](#) | First 1 of 1 Last

Primary	Transaction	Description	
<input checked="" type="checkbox"/>	Lead	Haas Engineering	

Transaction Opportunity

[Return to Task Details](#)

Transactions for the Task page

When you select a transaction type, the text that appears next to the Add Transaction button changes to reflect the transaction type.

Primary

Select to designate that this is the primary transaction that is associated with the task.

Transaction	Select a transaction type
Add Transaction	Select to choose a transaction from a list of transactions for the selected transaction type.

Viewing Calendars

This section discusses how to view calendars.

Pages Used to View Calendars

Page Name	Object Name	Navigation	Usage
Daily Calendar of <name>, Weekly Calendar of <name>, Monthly Calendar of <name>	RB_TSK_CALENDAR	<ul style="list-style-type: none"> My Calendars Click the Daily, Weekly, or Monthly link. My Tasks Click the My Calendar toolbar button. Click the Daily, Weekly, or Monthly link. 	View or update a calendar.
Other Calendars for <name>	RB_TSK_CAL_SRCH	<ul style="list-style-type: none"> My Calendars Click the Daily, Weekly, or Monthly link. My Tasks Click the My Calendar toolbar button. Click the View Other Calendars link. 	View another person's calendar.

Viewing or Updating Calendars

Access the My Calendars page.

See [Chapter 15, “Using Calendars,” page 205](#).

Viewing Another Person's Calendars

Access the Other Calendars for <name> page.

Other Calendars for Burt Lee

Use Search Criteria to Narrow the Search Results

Select the Person's Calendar to View

Name	Department
Terry Murphy	Western Sales Region
Burt Lee	Western Sales Region
Zack Reilly	Western Sales Region

[My Calendar](#)

▼ **Search**

Use Saved Search

[Basic Search](#)

Person ID

First Name

Last Name

Name

DeptID

Department

▼ **Show in Results**

☒ Person as Sales Manager

Other Calendars for Burt Lee page

Select the Person's Calendar to View

The names of all people who report to you appear in this list. You can click a person's name to view their calendar or refine the search criteria and search again.

Show in Results

Select one or more listed relationships. Only those persons who meet the search criteria and have the selected relationships to you appear in the search results.

Managing Meetings

This section lists the page that you use to manage meetings.

Page Used to Manage Meetings

Page Name	Object Name	Navigation	Usage
My Meetings	RB_TSK_MY_TASKS	My Meetings	View meetings in which you are a participant.

Viewing Meetings

Access the My Meetings page.

My Meetings

My Accounts
My Contacts
My Calendar
Add Contact
Add Task
>>
Personalize

Meetings
Meetings This Month

My Tasks

Customize
Find
View All
First
1-5 of 5
Last

	Subject	My Status	Task Status	Location	Start Date	Start Time	End Time	Contact
	Meet to Discuss Project		Open		05/03/2004	10:45AM PDT	11:15AM PDT	Ahmed Aluri
	Monthly Status Meeting With Jack Pepper		Open	Conference Call	05/04/2004	11:30AM PDT	12:00PM PDT	Jack Pepper
	Account Reviews		Open	Office	05/11/2004	2:00PM PDT	4:00PM PDT	
	Set up Exec Meeting		Open	Test Location	05/11/2004	9:00AM PDT	9:15AM PDT	Vic Tenneta
	Customer Dinner		Open	Boulevard Restaurant	05/13/2004	7:00PM PDT	11:00PM PDT	Waring Hudsucker

Schedule Meeting

My Meetings page

This page lists all tasks of type *Meeting* that are assigned to you. Click a listed subject to view meeting details.

View Meetings

Select from *All Meetings*, *Meetings this Month*, *Meetings this Week*, and *Meetings Today* to filter the list.

PART 7

Entitlement Management

Chapter 23

Setting Up and Managing Agreements and Warranties

Chapter 24

Defining Pricing Information for Services and Support Offerings

Chapter 25

Performing Entitlement Searches for Cases and Service Orders

CHAPTER 23

Setting Up and Managing Agreements and Warranties

This chapter lists common elements, provides overviews of agreements and warranties, agreement pricing, how agreements and entitlements are used in PeopleSoft Order Capture, and discusses how to:

- Define service levels.
- Define entitlements.
- Define entitlement plans.
- Define agreement templates.
- Define agreements.
- Define warranties.
- Generate sales leads for agreement renewal.

Understanding Agreements and Warranties

This section lists common elements and discusses agreements and warranties

Common Elements Used in This Chapter

Scope

Select the scope of the agreement. Values are:

Site: Indicates that the agreement applies to sites that are specified on the Scope Details page.

Note. For PeopleSoft Order Capture the system only allows *Site* as the scope for agreement templates when Available for Ordering is selected as an option.

Contact: Indicates that the agreement applies to named callers that are specified on the Scope Details page.

	<p>Note. Although agreements with a scope of <i>Contact</i> are not available for selection on service orders, you can select agreements of either <i>Site</i> or <i>Contact</i> as scope for cases.</p> <p>If you create a case and associate it to an agreement (regardless of the scope) and then create a service order from that case, you must first select an agreement for the new service order; so the agreement from the case is not defaulted to the service order.</p>
Max. Contacts (maximum contacts) or Maximum Number of Contacts	Enter the maximum number of named callers one can specify on the Scope Details page. This value is applicable to agreements with a scope of <i>Contact</i> .
Provider Group and Group Member	Select the default provider group and group member to perform the service request that is covered by this agreement. You can change these values on the service order.
Renew Agreement	Click to create a copy of the agreement that is about to expire. The CRM system sets the start date of the new agreement to the day after the end date of the old agreement and the new end date equal to the new start date plus the same number of days as the original agreement. You can establish new start and end dates for the renewed agreement and modify the information as necessary.
Payment Method	Select the customer's method of payment: <i>Credit Card</i> (credit card), or <i>PO</i> (purchase order).
Payment Terms	Select when payment is due. Payment terms in PeopleSoft CRM are synchronized with the payment terms from PeopleSoft Financials.
Purchase Option	<p>Select the method of purchasing the service or support offering for an agreement transaction. The prompt displays the purchase options (for agreement transactions) that are defined for the selected service or service-product combination in its pricing record on the Pricing Information page. The options for an agreement pricing record are:</p> <p><i>Flat:</i> Indicates that the service or support offering is purchased for a flat fee.</p> <p><i>Prepaid:</i> Indicates that a specified number of work units of the service or support offering is purchased in advance.</p>
	<hr/> <p>Note. The <i>T&M</i> (time and material) purchase option only applies to agreement service and on demand service transactions; it is not applicable to agreement transactions.</p> <hr/>

Agreements and Warranties

In PeopleSoft CRM, *agreements* reflect service or support contracts. *Warranties* define the coverage that is offered for a particular item that is installed at a customer's site. Both warranties and agreements define the services or support that the customer is entitled to and the duration of the contract.

- **Agreements:**

Agreements also 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:

- PeopleSoft Field Service

In a field service agreement, you specify what products in which customer sites are entitled to the service that is selected in each agreement line. An agreement can have one or multiple agreement lines, each of which also contains pricing and entitlement information. Each site on an agreement is assigned a site identification number (SIN) to identify whether a service can be performed at a particular location.

- PeopleSoft Support

Support agreements reference products on agreement lines. Similar to field service agreements, support agreements define customer sites that are entitled to support offerings. Support agreements can also define which people can contact your call center agents for support. Each named caller that is listed on an agreement is assigned a personal identification number (PIN) to identify the person as a valid caller when that person calls for support. You can define a support agreement for sites or for named callers, but you cannot define an agreement that includes lines for both sites and named callers.

- PeopleSoft HelpDesk

Help desk agreements represent an agreed upon level of service that an organization provides to its employees. Service level agreements define the response and restore times that the help desk will try to meet while responding to requests for service from employees. In addition to response and restore times, help desk agreements can define employees, products, installed products, priorities, sources of contact (phone, email, fax, and so on), departments, locations, and roles. Help desk agreements give agents the ability to associate an agreement line to a help desk case. Help desk agreements search against employee, products, installed products, plus other criteria such as case priority. An agreement can have one or multiple agreement lines, each of which also contains products, entitlements, and the various components that apply to the entitlements (role, department, priority, and so on).

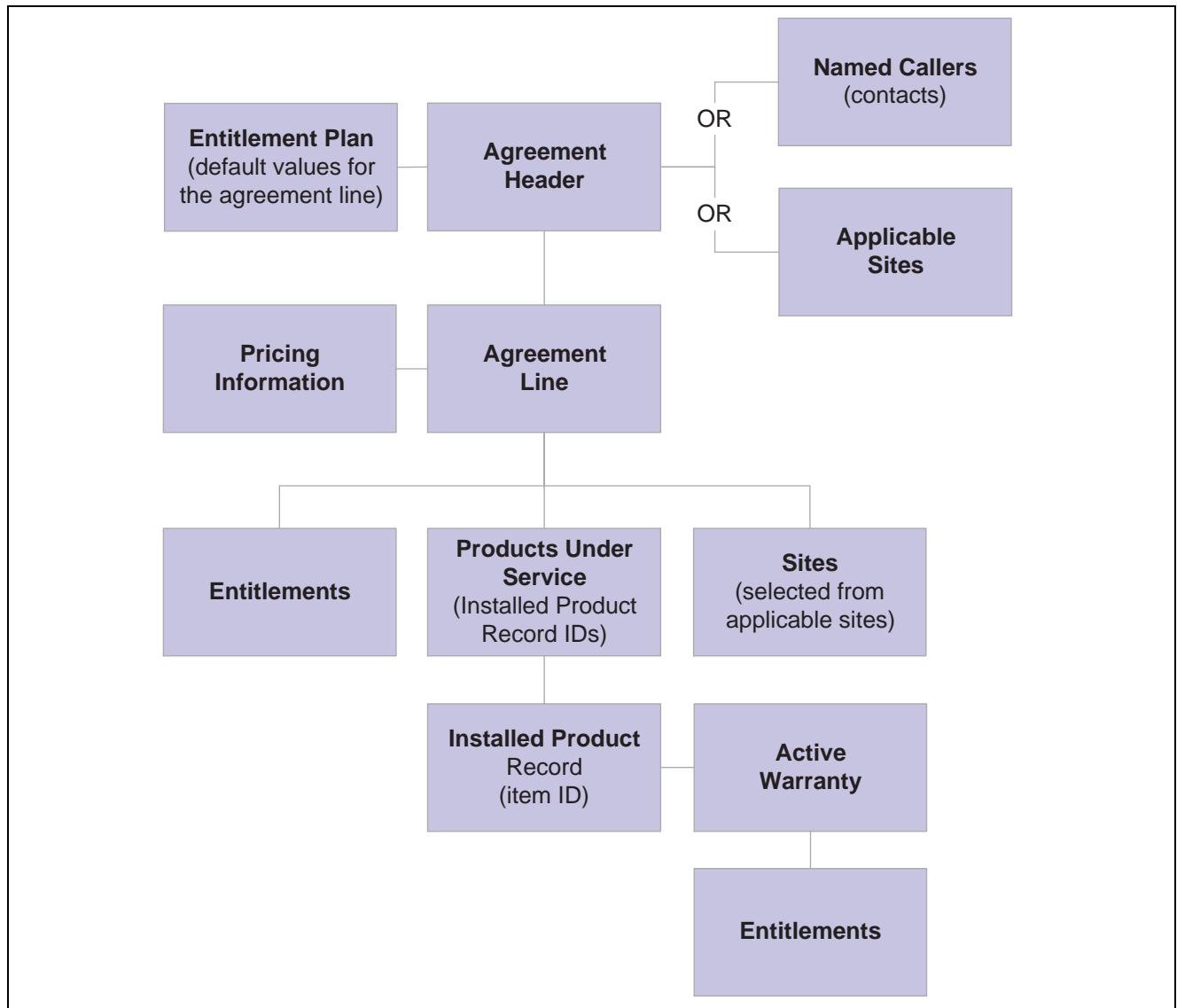
- Warranties:

You define the duration of the warranty and the entitlements that are owed to customers with covered products. You can associate warranties with items on the Item Definition page. For specific items that are installed at a customer's site, you can activate the warranty on the customer's installed product by using the Installed Product component.

Note. Warranties are not listed for PeopleSoft HelpDesk agreement search results

When searching for a customer's entitlements for a case or a service order that references an installed product, the CRM system first checks for a valid warranty on the installed product. It also searches for entitlements on the customer's agreement. The system lists any agreement entitlements that are found after the warranty entitlements.

This diagram shows the data model for agreements and shows the relationship between agreements and warranties:



Agreement data model

See Also

Chapter 25, “Performing Entitlement Searches for Cases and Service Orders,” page 391

Understanding Agreement Pricing

This section discusses:

- Pricing record retrieval
- Line price calculations
- Total price calculations
- Price recalculations

Note. You can use PeopleSoft CRM to calculate agreement prices. In PeopleSoft Support, agents can accept payment by credit card at the time of the transaction regardless of whether an agreement is associated with the support case.

Pricing Record Retrieval

The CRM system can retrieve five types of pricing records for the agreement line: agreement, agreement service, agreement case, on demand service, and on demand case.

Agreement pricing records define the fee that is paid for a specific service or support offering. The agreement price is paid when the agreement is issued to or signed by the customer. Agreement service pricing records define what the customer pays when the work that is associated with the service or support offering on the agreement is performed—that is, the price paid per transaction that is covered by a line item in the agreement. Likewise, agreement case pricing defines the amount payable by the customer for logging a case.

The CRM system only retrieves pricing records that are defined for the currency that is specified when you define the agreement. You cannot change the currency unless you clear the defined line pricing values.

For field service agreements, you define pricing records for a service or a service and product combination. When you create a line for a field service agreement, you can retrieve the price for the agreement. When you specify a prepaid purchase option, you must specify the prepaid quantity. The rate on the agreement pricing record that matches the criteria that you enter becomes the base line price for the agreement line.

The rate for the agreement service pricing record that matches your criteria becomes the transaction price for work that is covered by the agreement line.

For support agreements, the functionality is similar. You can create agreement pricing and agreement service pricing records that define support rates for specific products. When you create a support agreement, the same logic (used in field service agreements) is also used in support agreement to retrieve base line price.

See Also

[Chapter 24, “Defining Pricing Information for Services and Support Offerings,” page 385](#)

Line Price Calculations

To calculate the final line price on an agreement line that uses a flat purchase option, PeopleSoft CRM:

1. Calculates the entitlement adjustment for the line and applies it to the base line price.
2. Determines the number of days for the agreement line.
3. Calculates the base price adjusted for the agreement line duration.
4. Determines the number of installed products that is covered by the agreement line.

When these variables are determined, the CRM system calculates the final line price using this formula:

Final Line Price (for flat rates) = Duration Adjusted Base Line Price \times Entitlement Adjustment \times Installed Product Quantity

To calculate the final line price on an agreement line that uses a prepaid purchase option, the CRM system calculates the entitlement adjustment for the line and applies it to the base line price. The prepaid rate does not vary with the duration of the agreement, so there is no need to adjust the base line price to account for agreement duration. The final line price is calculated as:

Final Line Price (for prepaid rates) = Prepaid Rate \times Prepaid Quantity \times Entitlement Adjustment

Entitlement Adjustment

The CRM system adjusts the base line price or prepaid rate that is retrieved from the pricing record to account for uplifts and discounts that are associated with the entitlements on the agreement line. The uplift and discount percentage values are totaled and applied to the base line price using this formula:

Entitlement Adjusted Base Line Price = Base Line Price \times (1 + (sum of entitlement discount and uplift percentage values))

For example, the CRM system returns a base line price of 100 USD for an agreement line with three entitlements. The first entitlement has an uplift of 10 percent, the second an uplift of 15 percent, and the third a discount of 5 percent. The entitlement-adjusted base line price is calculated as:

Entitlement Adjusted Base Line Price = 100 USD \times (1 + (0.1 + 0.15 - 0.05)) = 100 USD \times 1.2 = 120 USD

Installed Product Quantity

When the agreement purchase option is flat, the entitlement-adjusted price on the agreement line applies to each installed product that is covered by the agreement line. The applicable installed products are listed on the Agreement Line page. To determine the installed product quantity, the CRM system adds the values in the quantity field of each referenced installed product.

Total Price Calculations

The total price is calculated by adding the final line prices on the associated agreement lines. Additionally, a final uplift or discount percentages can be applied to the base price of the agreement. For example, if the CRM system calculates a base price of 2,000 USD for the agreement and you have entered a discount of 10 percent, the CRM system calculates a total price of 1,800 USD for the agreement.

Price Recalculations

If you modify the entitlements on an agreement line, change the installed product quantity for an agreement line, or update the start and end dates of the agreement line after agreement line pricing has been calculated, the change you made is not reflected in the final line price.

In other words, if the values of the variables (for example, entitlement adjustment and agreement duration) that are used to calculate the current final line prices do not match the ones that are captured for the new calculation, the price of the agreement is no longer accurate. You can then recalculate the final price for the agreement lines as needed and update the total agreement price for the agreement.

Understanding How Agreements and Entitlements are Used in PeopleSoft Order Capture

The standard method of selling services is through a service agreement. In PeopleSoft CRM service agreements include installation services, maintenance services, and support services.

PeopleSoft provides the ability to associate a product with a service agreement, associate multiple products with the same service agreement, and drive the upsell offering of agreements when purchasing other products.

Users can purchase or renew agreements through PeopleSoft Order Capture and Order Capture Self Service.

Within a single agreement template line, you may define a product ID once (unless it is tied to different services). When agreement template lines contain multiple services for the same product ID, the customer must purchase all services. The agreement duration (start and end date), however, is not editable from the order.

Here is how the system calculates start and end dates for new and existing agreements:

- **New Agreements:**

For new Agreements the start date is today's date by default on the order. The start date is editable from the order. Based on the default start date or the start date entered by the user and the duration of the agreement, the system calculates the end date.

- **Existing Agreements:**

The system automatically fills in the end date with the end date of the existing agreement. Regardless of the start date, the end date for an existing agreement is not recalculated. The system uses the Duration fields on the Agreement Template page and the system date to calculate the start date for the service the user is purchasing.

When purchasing an agreement, the purchaser or the customer service representative (CSR) cannot modify the entitlements that appear on the template.

You may associate an agreement template with multiple products; however, there must only be one product per agreement template line. Service Agreements do not necessarily cover all products available in the catalog.

Pricing an agreement is dynamic in that it depends upon which products are being covered on the order by the agreement. The system does not allow Order Capture self-service users to link their purchased agreements to existing installed products. Self-service users need to call a CSR to use this functionality.

The system also does not allow Order Capture self-service users to add products to existing agreements. When internal Order Capture users select an existing agreement to add lines to, the system makes the end dates of the new lines the same as the end dates of the existing lines. PeopleSoft CRM does not maintain differing end dates on an order capture agreement. This facilitates the renewing of the agreement as all lines will expire at the same time.

Note. PeopleSoft Order Capture limits the user to one agreement per standard product ordered. For example, if a user orders a computer and the computer is covered by two agreements on the order, the computer can only be covered by one or the other agreement, but not both.

Defining Service Levels

This section provides an overview of service levels and service level suspensions and discusses how to:

- Define service levels
- Create additional cost categories for the service level.

Understanding Service Levels

You can define the hours of operation or prime period of maintenance for the services that your organization offers. For example, you may provide some services only during a 40-hour workweek, whereas other services may be provided 24 hours a day.

You can define entitlements for specific service levels, which can then be included on a customer's agreement. When a case or service order is covered by an agreement line with a service level entitlement, agents can use the service level information to determine required start dates and times for the work.

Note. In general, define service levels for each time zone that is covered by your organization.

Page Used to Define Service Levels

Page Name	Object Name	Navigation	Usage
Service Level	RF_SERVICE_LEVEL	Set Up CRM, Common Definitions, Entitlements, Service Level, Service Level	Define the authorized hours of operations or prime period of maintenance. These service levels are informational only.
Cost Category Definition	RF_SLVL_COSTCAT	Set Up CRM, Common Definitions, Entitlements, Service Level, Cost Category Definition	Create additional cost categories for the service level.

Defining Service Levels

Access the Service Level page.

Service Level

Cost Category Definition

SetID CRM01

Service Level 7X24

*Description Premium Service Level

*Short Description Premium

Time Zone PST

*Cost Category Code STRT

Defaults

Weekdays

Begin Time

End Time

Weekends

Begin Time

End Time

Apply Defaults

Service Level Details

Day	Begin Time	End Time	
Monday	12:00AM PST	11:59PM PST	Clear
Tuesday	12:00AM PST	11:59PM PST	Clear
Wednesday	12:00AM PST	11:59PM PST	Clear
Thursday	12:00AM PST	11:59PM PST	Clear
Friday	12:00AM PST	11:59PM PST	Clear

Service Level page (1 of 2)

The screenshot shows the 'Service Level page (2 of 2)'. At the top, there are two rows for 'Saturday' and 'Sunday'. Each row has two time input fields: '12:00AM PST' and '11:59PM PST', followed by a 'Clear' button. Below these is a 'Clear all' button. The main section is labeled 'Comments' and contains a text area with the text 'This service level is provided only for premium customers.' To the right of the text area are up and down arrow buttons and a checkmark icon. At the bottom, there is a section titled 'Audit History' with a right-pointing triangle icon.

Service Level page (2 of 2)

Service Level	Displays the name of the service level that you entered when the service level record was created.
Description and Short Description	Enter a long and short description. Because these descriptions are displayed in entitlements in which the service level is referenced, enter a meaningful service level description.
Time Zone	Select the appropriate time zone for the authorized hours of operations that you define for the service level. The CRM system populates the time zone code that you select next to the time values that you enter in the Defaults and Service Level Details group boxes. After you save the service level record, the time zone for the service level cannot be changed.
Cost Category Code	Select the cost category code that should apply for work performed during the days and times specified on this page.

Defaults

Enter the begin and end times for the weekdays and weekend days that you want the system to use for the service level. When you click the Apply Defaults button, the system enters the hours in the appropriate fields displayed in the Service Level Details group box.

Service Level Details

This group box displays the begin and end times for the days of the week associated with the service level. You may change the hours displayed in the fields or clear them all by clicking the Clear button.

Create Additional Cost Categories for the Service Level

Access the Cost Category Definition page.

Service Level

Cost Category Definition

SetID CRM01

Service Level 7X24

Description Premium Service Level

Short Description Premium

Time Zone PST

Details

Customize | Find | View All |

First 1-2 of 2 Last

*Day of the Week	*Start Time	*End Time	*Cost Category Code		
Saturday	8:00AM	5:00PM	HALF		<div>+ -</div>
Sunday	8:00AM	5:00PM	DOUB		<div>+ -</div>

Cost Category Definition page

If you charge different rates for the hours and days worked that were not defined on the Service Level page, use the fields on this page to define additional days, hours and cost categories.

For example, if you charge time-and-a-half for work performed on Saturday, select *Saturday* from the Day of the Week field, enter the hours in the Start Time and End Time fields, and then the select *HALF* as the cost category.

Defining Entitlements

This section provides an overview of entitlements and discusses how to define entitlements.

Understanding Entitlements

You define an entitlement record for every response time, restore time, coverage type, or service level that your company intends to offer on customer agreements or warranties. By using the Agreement component, you select the entitlement records that describe what the customer is contractually owed for the service or support offering on each line of the customer’s agreement.

Similarly, when defining warranties with the Warranty component, you select the entitlements that are contractually owed to customers who have an installed product that is covered by a valid warranty.

Each entitlement record can specify an uplift or discount to adjust the base price of agreement lines that include the entitlement. When the CRM system calculates the final line price of the agreement line, it adjusts the base line price to reflect the sum of the uplift and discount values that are associated with the entitlements on the line.

Page Used to Define Entitlements

Page Name	Object Name	Navigation	Usage
Entitlements	RF_ENTITLEMENTS	Set Up CRM, Common Definitions, Entitlements, Entitlements, Entitlements	Define entitlements that can be offered on agreements and warranties.

Defining Entitlements

Access the Entitlements page.

Entitlements

Entitlement

Entitlement Code

PREMIUM-02

SetID

CRM01

*Description

Premium Material Coverage

Uplift/Discount

10

%

*Entitlement Type

☐ Guaranteed Response

Minutes

☐ Guaranteed Restore

Minutes

☐ Service Level

Service Level

☒ Guaranteed Coverage

Coverage Type

Material

Percent Covered

75

Length

1

Unit

Year

▶ Audit History

Entitlements page

- Description

Enter a description. You can use up to 30 alphanumeric characters.

Important! Entitlement descriptions are displayed at the time of service order and case entry. Enter descriptions that are meaningful to the person who enters the service order or case. Typically, the entitlement description describes the response time, restore time, coverage, or service level that is contractually owed to the customer per the specified agreement line or warranty. For example, you may want to include the time zone of a service level in its description.
- Uplift/Discount

Enter the percentage of uplift or discount to add to the price of agreement lines that include this entitlement. Enter discounts with a minus sign that precedes the amount; enter uplifts without a minus or plus sign.
- Entitlement Type

Specify the category of entitlement that is defined by the entitlement code together with the entitlement details that are associated with the selected category.

Guaranteed Response and Minutes

Select to entitle the customer to a response within the specified number of minutes. PeopleSoft Integrated FieldService uses the guaranteed response time to calculate the start date and time for service orders, if the automatic calculation feature is enabled at the business unit level. If the feature is disabled, agents can manually determine the customer preferred start date and time for service orders based on this information.

Guaranteed Restore and Minutes

Select to entitle the customer to restored functionality of the product within the specified number of minutes. PeopleSoft Integrated FieldService uses the guaranteed restore time to calculate the end date and time for service orders, if the automatic calculation feature is enabled at the business unit level. If the feature is disabled, agents can manually determine the customer preferred end date and time for service orders based on this information.

Service Level	Select to entitle the customer to a specific service level or prime period of maintenance. Service levels are established on the Service Level page. PeopleSoft Integrated FieldService uses the service level that is specified in the entitlement to calculate the start and end dates and times for service orders, if the automatic calculation feature is enabled at the business unit level.
Guaranteed Coverage	Select to entitle the customer to a percentage of a specific type of coverage for a specific amount of time. When defining an entitlement for guaranteed coverage, select a coverage type, define the percent covered, and specify a time frame by entering a numeric value in the Length field and defining an appropriate unit, either <i>Day</i> , <i>Week</i> , <i>Month</i> , or <i>Year</i> .
Coverage Type	<p>Select a coverage type if you select <i>Guaranteed Coverage</i> as the entitlement type. Values are:</p> <p><i>Expenses:</i> The portion (specified in the Percent Covered field) of any expenses that are associated with completing the customer's service order is not charged to the customer.</p> <p><i>Material:</i> The portion (specified in the Percent Covered field) of the cost of any materials that are required to complete the customer's service order is not charged to the customer.</p> <p><i>Time:</i> The portion (specified in the Percent Covered field) of the cost of any labor required to complete the customer's service order or case is not charged to the customer.</p>

See Also

Chapter 23, "Setting Up and Managing Agreements and Warranties," Defining Service Levels, page 343

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, "Creating and Managing Service Orders," Setting Up Automatic Calculation of Dates and Times for Service Orders

Defining Entitlement Plans

This section provides an overview of entitlement plans and discusses how to define entitlement plans.

Understanding Entitlement Plans

Use entitlement plans as default values on agreements or warranties. You can reference a relevant entitlement plan to quickly populate an agreement or warranty with the entitlements that are associated with the plan. You can then delete or add other entitlements as necessary.

Page Used to Define Entitlement Plans

Page Name	Object Name	Navigation	Usage
Entitlement Plan Setup		Set Up CRM, Common Definitions, Entitlements, Entitlement Plan, Entitlement Plan Setup	Define groups of entitlements that can be referenced and populated quickly on agreements and warranties.

Defining Entitlement Plans

Access the Entitlement Plan Setup page.

Entitlement Plan Setup

Entitlement Plan Name

GOLD


SetID



CRM01



















*Description


Extended Plan

Entitlements

Customize | Find | 

First  1-6 of 6  Last

*Description	Entitlement Minutes	Service Level	Coverage Type	Percent Covered	Coverage Length	Unit	Uplift / Discount		
Five hour guaranteed response 	300						10		
Eight hour guaranteed restore 	480						10		
Extended Service Level 		Extended					15		
Extended Expense Coverage 			Expenses	50	1 Year		5		
Extended Material Coverage 			Material	50	1 Year		5		
Extended Time Coverage 			Time	50	1 Year		5		

 Audit History

Entitlement Plan Setup page

You can create new or update existing entitlement plans by adding or removing entitlement entries from the plan. When you reference an entitlement plan on an agreement, the system automatically populates the plan’s associated entitlement entries to the agreement.

Note. An entitlement plan must have at least one entitlement associated with it.

See Also

Chapter 23, “Setting Up and Managing Agreements and Warranties,” Defining Entitlements, page 346

Configuring the CRM System for Agreement Searches

This section provides an overview on agreement searches and discusses how to configure agreement searches.

Understanding Agreement Searches

The Agreement Search Configuration page allows you to configure how the agreement search should function for PeopleSoft Support cases (external case agreement search), PeopleSoft HelpDesk cases (internal case agreement search) and PeopleSoft Integrated FieldService service orders (service order agreement search).

For External agreements, there are separate group boxes for cases and service order that allow you to tell the system how to search for agreements using these options:

- Autoselect the shortest response time from all matches.
- Autoselect the longest response time from all matches.
- Allow the user to choose from all matches.

For internal agreements (PeopleSoft HelpDesk), you can also use category weightings to instruct the system to select agreements. The system allows you to use role, department, location, source (inbound contact method), and/or priority. You can then choose a weighting from 0 to 5 for each of the categories.

Page Used to Configure Agreement Searches

Page Name	Object Name	Navigation	Usage
Agreement Search Configuration	RF_AG_SRCH_CFG	Set Up CRM, Common Definitions, Agreement Search Configuration, Agreement Search Configuration	Define how the system will search for agreements.

Configuring Agreement Searches

Access the Agreement Search Configuration page.

Agreement Search Configuration

*SetID CRM01

External Case Agreement Search

☐ User Selects From All Matches
☒ Autoselect Shortest Response
☐ Autoselect Longest Response

Internal Case Agreement Search

☐ User Selects From All Matches
☐ Autoselect Shortest Response
☐ Autoselect Longest Response
☒ Autoselect Based on Rules

Selection Rules

*Category	*Category Weight		
Priority	5 - High	+	-

Service Order Agreement Search

☐ User Selects From All Matches
☒ Autoselect Shortest Response
☐ Autoselect Longest Response

Save Return to Search Add Update/Display

Agreement Search Configuration page

Note. The group boxes that appear on this page are dependent on which PeopleSoft applications you have installed. For example, the External Case Agreement Search group box appears only if you have PeopleSoft Support installed. The Internal Case Agreement Search group box appears only if you have PeopleSoft HelpDesk installed. The Service Order Agreement Search group box appears only if you have PeopleSoft Integrated FieldService installed.

External Case Agreement Search

Select one of the options listed to indicate how you want the system to search for agreements when a user selects the Select Agreement or Warranty link from the Case page in PeopleSoft Support.

Internal Case Agreement Search

Select one of the options listed to indicate how you want the system to search for agreements when a user selects the Select Agreement or Warranty link from the Case page in PeopleSoft HelpDesk.

If you select the Autoselect Based on Rules option, select one or more categories that you want the system to use in its search. You can add categories and give each one the same or a different weighting.

Note. Weightings are based on a five point scale, with 5 representing the highest weighting. A weighting of 0 - *Not Applicable* indicates that the system should not consider the category in the agreement search. The system does not display categories with a 0 weighting on the Agreement Line page. An edit prevents users from saving the page if they select the Autoselect Based on Rules option and all five categories have a 0 weighting.

Service Order Agreement Search

Select one of the options listed to indicate how you want the system to search for agreements when a user selects the Select Agreement or Warranty link from the Service Order page in PeopleSoft Integrated FieldService.

Defining Agreement Templates

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

- Define basic header and billing information for agreement templates.
- Define default entitlement sets.
- Define default agreement lines.
- View and access linked product definitions.

Understanding Agreement Templates

You can define model agreements for specific types of customers. When you define an agreement for a specific customer by using the Agreement component, you can reference an agreement template to populate the basic agreement information and then make modifications as necessary.

Pages Used to Define Agreement Templates

Page Name	Object Name	Navigation	Usage
Agreement Template	RF_AGREETEMP_HDR	Customer Contracts CRM, Agreements, Agreement Templates, Agreement Template	Define basic header and billing information for agreement templates.
Entitlement Defaults	RF_AGREETEMP_ENTL	Customer Contracts CRM, Agreements, Agreement Templates, Entitlement Defaults	Define a set of entitlements to use as default values for the entries that are added on the Template Line page.
Template Line	RF_AGREETEMP_LINE	Customer Contracts CRM, Agreements, Agreement Templates, Template Line	Define default agreement lines.
Related Products	RF_AGREETEMP_PROD	Customer Contracts CRM, Agreements, Agreement Templates, Related Products	View and access linked product definitions.

Defining Basic Header and Billing Information for Agreement Templates

Access the Agreement Template page.

Agreement Template page

Agreement Category

This field is required on the Add page when you are adding a new agreement. For agreements used in PeopleSoft HelpDesk, you must select *Internal* as the agreement category.

For agreements used in PeopleSoft Support and PeopleSoft Integrated FieldService, select *External* as the agreement category.

Status Information

Use the fields appearing in this group box to select the scope and status for the agreement template you are defining.

Note. If you are defining an agreement template for PeopleSoft HelpDesk and you selected *Internal* as the agreement category, only the Status field appears on this page.

Scope

Select either *Site* or *Contact* to indicate the scope of the agreement template. If you select *Contact*, enter the number of contacts in the Maximum Contacts field.

Note. The system only allows *Site* as the scope for agreement templates when Available for Ordering is selected as an option in the Order Capture group box. This is because PeopleSoft Integrated FieldService only uses *Site* as the scope for this type of agreement for service orders. PeopleSoft call center applications can use either *Contact* or *Site* as the scope.

Status

Select the status of the agreement: *Pending*, *Active*, or *Closed*. There are no system processes that change the status value of the agreement template, but you can manually change the status as necessary. You can only use templates with a status of *Active* to create a new agreement.

Coverage

Select the provider group and provider group member that you want the system to use for the agreement template.

Billing Information

Select the payment terms and payment method that you want the system to use for billing for agreements using the agreement template.

Order Capture Information

Available for Ordering

Select to indicate if the agreement template may be sold through PeopleSoft Order Capture

Duration

Enter the duration for the agreement template.

Since start and end dates cannot be added to the template and the start and end dates are one of the attributes used to price an agreement line, the system uses the Duration field to calculate start and end dates. As such, agreements created from the template will have their own start and end dates.

The system uses the current system date to set the agreement line start date (or the override start date on the order). The system adds the duration to the start date to calculate the end date.

Product and Product ID

Select *Create New* if you want the system to create a new product from the agreement template. The system creates a new product ID value when you save the new template. The system sets the description of the product to the template ID. It also sets the service flag on the product to Y for Yes.

Select *Use Existing* to select a product from the Product ID field.

Note. If autonumbering is turned off, the system returns an error message when you attempt to save the template.

See Also

[Chapter 25, “Performing Entitlement Searches for Cases and Service Orders,” page 391](#)

Defining Default Entitlement Sets

Access the Entitlement Defaults page.

Agreement Template

Entitlement Defaults

Template Line

Template ID

SUPPLIES_1

Agreement Category

External

SetID

CRM01

Default Entitlements

Entitlement Plan Name

GOLD

Entitlements

Customize

Find

First

1-6 of 6

Last

*Description	Entitlement Minutes	Service Level	Coverage Type	Percent Covered	Coverage Length	Unit	Uplift or Discount
Five hour guaranteed response	300						10 + -
Eight hour guaranteed restore	480						10 + -
Extended Service Level		Extended					15 + -
Extended Expense Coverage			Expenses	50	1 Year		5 + -
Extended Material Coverage			Material	50	1 Year		5 + -
Extended Time Coverage			Time	50	1 Year		5 + -

Audit History

Entitlement Defaults page

Entitlement Plan Name

Select a default entitlement plan. (Plans are established on the Entitlement Plan Setup page.) The entitlements in the plan appear. You can add or delete entitlements to create a specific list for this template.

The PeopleSoft CRM system displays the information that is associated with each entitlement as defined on the Entitlements page.

Note. Setting up plans is optional. You can add individual entitlements directly to the grid.

See Also

Chapter 23, “Setting Up and Managing Agreements and Warranties,” Defining Entitlements, page 346

Chapter 23, “Setting Up and Managing Agreements and Warranties,” Defining Entitlement Plans, page 348

Defining Default Agreement Lines

Access the Template Line page.

Agreement TemplateEntitlement DefaultsTemplate Line

Template ID SUPPLIES_1SetID CRM01

Agreement Category External

Agreement Line Details

Find | View AllFirst1 of 1Last

Line Number 001

Description

Service Servicing the Climate-Controlled Computer Ro

Service Pricing Details

Purchase OptionPrepaid Quantity

Products

Customize | Find | View All | First1 of 1Last

*Product	Description	Purchase Option	Prepaid Quantity
10000	Refrigerator, Plastic Bins		

Audit History

Template Line page

Agreement Line Details

Add rows for each new line.

- Line Number

Displays the agreement line number. The CRM system automatically increments this number for each row that you add. The agreement line number and description appear on cases that are covered by the agreement line entitlements. Service orders only display the agreement name, not line number.
- Service

Select the service that is covered by the agreement line. For field service agreements, select a service. Support agreements do not reference services. You define services by using the Service component.

The PeopleSoft CRM system prompt displays only services with an active status and for which the Agreement check box has been selected on the Service page.

Note. Since there is no start date on the Template Line page, the system validates that the agreement start date occurs between the offer start date and the offer end date defined for the service on the Agreement Line page, not the Template Line page.

Service Pricing Details

Define the default criteria for retrieving pricing records for an agreement line.

- Purchase Options

Select the purchase options that you want the system to use for the agreement template.
- Prepaid Quantity

Enter the number of work units of a service or support offering that a customer pays for in advance. This value only applies to the *Prepaid* purchase option.
- Product, Purchase Options and Prepaid Quantity

Select the product covered by the agreement line, the purchase option, and the prepaid quantity.

If you select a service, the CRM system prompt displays all the products that are defined for the service. If no service is selected, the system prompt displays all products that are defined in it.

Products are established with the Product enterprise integration point (EIP) or the Product Definition component.

Entitlements

Displays the entitlements that are contractually owed to the customer for this agreement line. This information is initially populated by using the Entitlement Defaults page. The user, however, can modify the entitlements for each line.

Note. If you select the Available to Order field on the Agreement Template page, the system hides the Add row and Delete row buttons on the Entitlements grid. The system copies the entitlement information from the Entitlement Defaults page to each new line. You cannot change these entitlements in the Entitlements grid. This is required to ensure that all template lines, regardless of the product ID entered for each template line will have the same set of entitlements.

This is important when performing a side-by-side comparison of products in the product catalog to determine which service agreement is the best fit for the product selected. Additionally, if you select the Available to Order field, the system defaults the Purchase Option field to *FLAT* and makes it read only, since flat fee is the only type of agreement fee PeopleSoft Order Capture uses for the purchase of agreements. Therefore, it is important to ensure that you have first created flat fee prices for each service or product that you intend to use on an agreement template.

Entitlements Apply To

This group box appears only if you are defining an agreement template for PeopleSoft HelpDesk and you selected *Internal* as the agreement category. Also, the system displays a set of fields based on the options you selected on the Agreement Search Configuration page for the business unit you are using.

For example, if you selected the *Autoselect Based on Rules* option and selected *Role*, *Department*, *Priority*, *Source*, and *Location* as categories that you wanted the system to use when searching for agreements, the system would display all of the fields.

Use the fields that appear in this group box to link the response and restore times to the different values for the various fields that can appear on the Case page. For example, if you set the priority for the agreement to low, and a user selects the Select Agreement link on a low priority case, the system will default the respond and restore times that you set up on the Entitlement Defaults page.

If you select *User Selects From All Matches*, *Autoselect Shortest Response*, or *Autoselect Longest Response*, on the Agreement Search Configuration page, the system does not display this group box.

See Also

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

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

Viewing and Accessing Linked Product Definitions

Access the Related Products page.

Agreement Template | Entitlement Defaults | Template Line | **Related Products**

Template ID OC_1 **Agreement Category** External

SetID CRM01

Associated Products Customize | Find | First 1 of 1 La:

Product ID	Description	Status	SetID
300053	Plastic Bins	Active	CRM01

▶ **Audit History**

Related Products page

If the template is being used with PeopleSoft Order Capture, the system also displays the Related Products page. The system uses the Related Products page to show all products that point to the template. The system does not display this page until you save the template and navigate to the page from one of the other pages in the Agreement Template component.

To access the Product Definition page, click the link under the Product ID field.

Note. If the Agreement Template is set to a closed status and there are active products in the Related Products tab, the system displays a warning message stating that there are active products associated with the Agreement Template and that inactivating the template may also inactivate the related products.

Defining Agreements

This section provides an overview of agreement definitions and discusses how to:

- Define agreement header information.
- Specify people or sites that are entitled to service or support.
- Specify default entitlements.
- Define detailed agreement line information.
- Define billing information.

Understanding Agreement Definitions

When you create a case or service order for a customer and click the Select Agreement or Warranty button, the CRM system searches for agreement lines or warranties that cover the case or service order and displays the associated entitlements. The CRM system uses the values that you have entered in the fields for product ID, serial number, and either site or SIN to search for agreement line and warranty matches for service orders. For cases, the CRM system uses the same fields, as well as those for contact or PIN. It also displays any transaction price information that is defined under the terms of the agreement.

See Also

Chapter 23, “Setting Up and Managing Agreements and Warranties,” Understanding Agreement Pricing, page 340

Chapter 25, “Performing Entitlement Searches for Cases and Service Orders,” page 391

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

Pages Used to Define Agreements

Page Name	Object Name	Navigation	Usage
Agreement	RF_AGREEMENT_HDR	Customer Contracts CRM, Agreements, Agreements, Agreement	Define agreement header information.
Scope Details	RF_AGREEMENT_COV	Customer Contracts CRM, Agreements, Agreements, Scope Details	Specify people that are entitled to call center support or customer sites that are entitled to the service that is detailed by agreement lines.
Default Entitlements	RF_AGREEMENT_ENTL	Customer Contracts CRM, Agreements, Agreements, Default Entitlements	Specify a set of entitlements to use as default values for the rows that are added on the Agreement Line page.
Agreement Line	RF_AGREEMENT_LINE	Customer Contracts CRM, Agreements, Agreements, Agreement Line	Define detailed agreement line information for each service or support offering.
Billing Details	RF_AGREEMENT_BILL	Customer Contracts CRM, Agreements, Agreements, Billing Details	Define agreement billing information.

Defining Agreement Header Information

Access the Agreement page.

Agreement

Save | Search | Add | Next | Previous | 360 360-Degree View | Personalize

Agreement Code COM-AGR-101
Customer [Health Conscious.com](#)
Contact
Category External

SetID CRM01
Customer Value Gold☆☆☆☆
Status Active
Scope Site

Agreement | Scope Details | Default Entitlements | Agreement Line | Billing Details

Agreement Information

Agreement COM-AGR-101
***Scope** Site
Start Date 04/05/2003
***Status** 2-Active
Description

Renewal Number 1
Maximum Contacts
End Date 04/05/2007
☐ **Order Capture Created**

Agreement page (1 of 2)

Customer Information

Customer [Health Conscious.com](#)
Sold To Address 6544 San Tomas Blvd,San Jose,CA,98744,USA
Prefix **Phone**
Contact **Contact Site**
Extension

Default Provider Group

Provider Group Appliances Western **Group Member**

▶ **Audit History**

Agreement page (2 of 2)

Agreement Category

This field is required on the Add page when you are adding a new agreement. For agreements used in PeopleSoft HelpDesk, you must select *Internal* as the agreement category. For agreements used in PeopleSoft Support and PeopleSoft Integrated FieldService, select *External* as the agreement category.

Note. In the top section of this page the system changes the field label to Category.

Copy From Agreement Template

When you create a new agreement, you can either add all the information to it manually, or base it on an agreement template.

Note. This group box does not appear if the agreement has already been created and saved.

Copy from Template and Template ID

Select a template and then click the Copy from Template button to populate the agreement with information that is established in the selected agreement template.

Note. Because the integration with PeopleSoft Contracts requires certain validations before a user can set the status of an agreement to *Active*, the system does not copy the value of the Status field from the agreement template to the new agreement. The system initially sets the status of the new agreement to *Pending*.

A user can change the status of the agreement to *Active* by taking certain actions; but they cannot create a new agreement with a status of *Active* by copying information from an agreement template.

Agreement Information

Renewal Number Displays the renewal version of the agreement. When an agreement is first created, this value is set to *1*. Each time you renew the agreement by clicking the Renew Agreement button, the CRM system increments this value by 1.

Scope and Maximum Contacts Select either *Site* or *Contact* to indicate if the agreement applies to sites or callers (contacts). If you select *Contacts*, enter the maximum number of that would be allowed to call within the scope of the agreement.

Note. These fields do not appear on the page if you are creating an agreement for PeopleSoft HelpDesk and selected *Internal* as the agreement category when you added the agreement.

Status Select from *Pending*, *Pending Activation*, *Action Required*, *Active*, or *Closed*. There are no system processes that change the status value of the agreement, but you can manually change the status. When an entitlement search is performed for a case or a service order, the CRM system includes only agreements with an *Active* status that are effective on the date that the search is performed.

Note. When renewing an agreement, you should manually adjust the status of the old agreement to *Closed* on the date that it expires and ensure that the status of the new agreement is set to *Active*.

For example, if you renew an agreement one week before it expires, the new agreement should have a status of *Pending Activation*, and the old agreement should retain its status of *Active* until the renewal date matches the current date. At that point the old agreement status should be set to *Closed*, and the new agreement status should be set to *Active*.

If you have an integration with PeopleSoft Transaction Billing Processor, the system makes the *Pending Activation* and *Action Required* statuses available. Additionally, if you are using this integration, the system changes the status from *Pending Activation* to *Active* or *Action Required* based on the success you have creating a corresponding entry in PeopleSoft Transaction Billing Processor.

Order Capture Created If this check box is selected the agreement was created through PeopleSoft Order Capture.

Contract Details Click this link to go the Contract Information page. Use this page to view contract information associated with the contracts business unit, general ledger business unit, and contract details.

Customer Information

This section does not appear on the page if you are creating an agreement for PeopleSoft HelpDesk and selected Internal as the agreement category when you added the agreement.

Customer	Click the Search button to select the name of the customer. Customers are established by using the Customer EIP, or the Company (select Customers CRM, Add Company) or Consumer component (select Customers CRM, Add Person).
Contact	<p>Click the Search button to select the name of the customer's agent. This is the person to contact about agreement administration issues, such as renewing and remitting payment for agreements.</p> <p>You define contacts by using the Contact component or the Contacts page of the Company, Consumer, or Site component.</p>
Contact Site	<p>Select the customer site that is associated with the contact. You establish this relationship by using the Customers page of the Contact component.</p> <hr/> <p>Note. The prompt for this field shows only sites that are associated with the contact.</p> <hr/>
Prefix, Phone, and Extension	<p>Enter the telephone information for the customer's contact. If you select a contact, the CRM system populates these fields with the primary telephone information of this person's role as a customer's contact. You can modify this information as needed.</p>

Contact Information

These fields appear on the page only if you are creating an agreement for PeopleSoft HelpDesk and selected Internal as the agreement category when you added the agreement.

First Name, Last Name, Phone, Location and Search	Click the Search button to select the name of the contact . You define contacts by using the Workforce component (select Workforce, Create Worker).
Prefix, Phone, and Extension	Enter the telephone information for the contact. If you select a contact, the CRM system populates these fields with the primary telephone information of the contact. You can modify this information as needed.

Default Provider Group

Enter the default provider group and group member that get assigned to perform services that are covered by this agreement.

Note. This group box does not appear on the page if you are creating an agreement for PeopleSoft HelpDesk and selected Internal as the agreement category when you added the agreement.

See Also

[Chapter 23, “Setting Up and Managing Agreements and Warranties,” Defining Agreement Templates, page 352](#)

[Chapter 25, “Performing Entitlement Searches for Cases and Service Orders,” page 391](#)

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook,
“Defining Company Business Objects”

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, “Defining Person
Business Objects,” Defining Consumer Information

Specifying People or Sites That Are Entitled to Service or Support

Access the Scope Details page.

Agreement

Save | Search | Add | Next | Previous | 360 360-Degree View | Personalize

Agreement Code COM-AGR-101
Customer Health Conscious.com
Contact
Category External

SetID CRM01
Customer Value Gold☆☆☆☆
Status Active
Scope Site

Agreement | **Scope Details** | Default Entitlements | Agreement Line | Billing Details

Valid Sites

Site ID	Site Name	SIN		
482	Hillsboro	SIN0000001	+	-
483	Palo Alto	SIN0000002	+	-
484	Redwood City	SIN0000003	+	-
485	Riverdale	SIN0000004	+	-

▶ Audit History

Scope Details page

This page varies depending on the scope that is specified on the Agreement page. For agreements with the contact scope, you enter the people who are eligible for support. These agreements are only available to PeopleSoft Support. For agreements with the site scope, you enter sites that are eligible for service. These agreements are available to both PeopleSoft Support and PeopleSoft Integrated FieldService.

Note. This page does not appear if you are creating an agreement for PeopleSoft HelpDesk and selected Internal as the agreement category when you added the agreement.

Named Callers

This grid appears if the selected agreement has a scope of contact. Enter the people who are eligible to request support that is related to this agreement.

Primary

Select if this person is the primary caller.

Name

Enter the name of a person who is entitled to request support that is defined by the agreement lines. Named callers must first be established as contacts by using the Contact component or the Contacts page of the Company, Consumer, or Site component. The number of contacts that you specify cannot exceed the number of maximum contacts that are recorded on the Agreement page.

Note. For consumer agreements with the contact scope, the CRM system populates the first row of the Named Callers grid with the name of the customer that is specified on the Agreement page. You can change this value or add additional rows.

PIN (personal identification number) Displays a unique value that is generated by the CRM system for each caller when the agreement is saved. Customers calling to request support under the terms of the agreement provide their PIN to your customer service representative (CSR). The CRM system uses the PIN that the CSR enters on cases to identify the agreement that defines the customer’s entitlements.

Note. The PIN is unique for every person within an agreement. If a person is a named caller on two agreements, this person is assigned two PINs.

Valid Sites

This grid appears if the selected agreement has a scope of site. Enter customer sites that are eligible to receive support or services specified on its agreement lines.

Site Name Enter the name of the site that is covered by this agreement. The CRM system displays the site ID of the selected site automatically.

SIN (site identification number) Displays a unique value that is generated by the CRM system for each site when the agreement is saved. Customers calling to request service under the terms of the agreement provide the SIN to your CSR. The CRM system uses the SIN that the CSR enters on cases or service orders to identify the agreement line that defines the customer’s entitlements for a particular site.

Note. The SIN is unique for every site within an agreement. If a site is a valid on two agreements, the site is assigned two SINs.

See Also

PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook, “Defining Site Business Objects”

Specifying Default Entitlements

Access the Default Entitlements page.

Agreement

Save

Search

Add

Next

Previous

360-Degree View

Personalize

Agreement Code

COM-AGR-101

SetID

CRM01

Customer

Health Conscious.com

Customer Value

Gold☆☆☆☆

Contact

Category

External

Status

Active

Scope

Site

Agreement

Scope Details

Default Entitlements

Agreement Line

Billing Details

Default Entitlements

Entitlement Plan Name

GOLD

Entitlements

Customize

Find

First

1-6 of 6

Last

*Description	Entitlement Minutes	Service Level	Coverage Type	Percent Covered	Coverage Duration	Uplift or Discount		
Five hour guaranteed response	300					10	+	-
Eight hour guaranteed restore	480					10	+	-
Extended Expense Coverage			Expenses	50	1 Year	5	+	-
Extended Material Coverage			Material	50	1 Year	5	+	-
Extended Time Coverage			Time	50	1 Year	5	+	-
Standard Service Level		Standard					+	-

Audit History

Default Entitlements page

Note. If you are creating an agreement for PeopleSoft HelpDesk and selected Internal as the agreement category when you added the agreement, the system does not display the Coverage Type, Percent Covered, Coverage Duration and Uplift or Discount fields

Default Entitlements

- Entitlement Plan Name

Select a default entitlement plan to populate the grid initially. You define entitlement plans on the Entitlement Plan Setup page.

The list of entitlements in the grid becomes the default entitlement set for each new line that is added on the Agreement Line page.

Add or delete entitlements on each agreement line to define the final set of entitlements that is contractually owed to the customer. Each line in the grid is associated with the entitlement information that is defined on the Entitlements page.
- Description

Click the Lookup Entitlement Name button to locate entitlements that you want to add to the Entitlements grid.

Note. Any changes that you make to the defaults do not affect any existing agreement lines.

See Also

- Chapter 23, “Setting Up and Managing Agreements and Warranties,” Defining Entitlements, page 346
- Chapter 23, “Setting Up and Managing Agreements and Warranties,” Defining Entitlement Plans, page 348

Defining Detailed Agreement Line Information

Access the Agreement Line page.

Agreement

Save | Search | Add | Next | Previous | 360 360-Degree View | Personalize

Agreement Code COM-AGR-101 **SetID** CRM01
Customer Health Conscious.com **Customer Value** Gold☆☆☆☆
Contact **Status** Active
Category External **Scope** Site

Agreement | Scope Details | Default Entitlements | **Agreement Line** | Billing Details

View Line Summary | Line Details | Installed Products | Entitlements | Sites | Price Information

Agreement Lines Customize | Find | First 1-2 of 2 Last

Agreement Line	Description	Service Description	Start Date	End Date	Line Status	
Line 001	PM on Air Conditioners	Preventive Maintenance Service for Air Conditioners	04/05/2003	04/05/2007	Active	-
Line 002	Repair A/C	Repair Air Conditioner	04/05/2003	04/05/2007	Active	-

Add Agreement Line

Agreement Line - View Line Summary page

Agreement

Save | Search | Add | Next | Previous | 360 360-Degree View | Personalize

Agreement Code COM-AGR-101 **SetID** CRM01
Customer Health Conscious.com **Customer Value** Gold☆☆☆☆
Contact **Status** Active
Category External **Scope** Site

Agreement | Scope Details | Default Entitlements | **Agreement Line** | Billing Details

View Line Summary | **Line Details** | Installed Products | Entitlements | Sites | Price Information

Agreement Line Details Find | View All | First 1 of 2 Last

Line 001 **Status** 2-Active + -

*** Start Date** 04/05/2003 *** End Date** 04/05/2007

Description PM on Air Conditioners

Service Preventive Maintenance Service for Air Conditioners

Agreement Line - Line Details page (1 of 5)

▼ **Service Pricing**

Purchase Option

Prepaid Quantity

[Price Definitions](#)

Prepaid Rate USD

Prepaid Unit

Base Line Price USD

Base Line Price Unit

Price Per Transaction

Purchase Option

Price USD

Transaction Price Unit

Remaining Quantity 0.00

Agreement Line - Line Details page (2 of 5)

Products [Customize](#) | [Find](#) | [View All](#) | First 1 of 1 Last

Product ID	Description	Purchase Option	Prepaid Quantity	Prepaid Rate	Prepaid Unit	Base Line Price	Base Line Price Unit		
SR1003	12000 BTU Room Air (Light Beig	FLAT	<input type="text"/>			50.00	Year		

Valid Sites [Customize](#) | [Find](#) | First 1-4 of 4 Last

Select Line Site	Site ID	Description		
Site	482	Hillsboro		
Site	483	Palo Alto		
Site	484	Redwood City		
Site	485	Riverdale		

Agreement Line - Line Details page (3 of 5)

Products Under Service [Customize](#) | [Find](#) | [View All](#) | First 1-4 of 4 Last

Installed Product ID	Description	Serial Number	Asset Tag	Qty	Site
<input type="checkbox"/> INS0000005	12000 BTU Room Air (Light Beig	SR1003-1001		1.0000	Hillsboro
<input type="checkbox"/> INS0000006	12000 BTU Room Air (Light Beig	SR1003-1002		1.0000	Palo Alto
<input type="checkbox"/> INS0000007	12000 BTU Room Air (Light Beig	SR1003-1003	1	1.0000	Redwood City
<input type="checkbox"/> INS0000008	12000 BTU Room Air (Light Beig	SR1003-1004		1.0000	Riverdale

Agreement Line - Line Details page (4 of 5)

Entitlements				Customize	Find	First	1-2 of 2	Last
*Description	Type	Minutes	Service Level	Coverage	Percent Covered	Duration	Uplift or Discount	
One day guaranteed response	Response	1440						+ -
Four hour guaranteed restore	Restore	240					15	+ -

Calculate Final Line Price

Base Price	800.00	USD
Entitlement Adjustment	0.00	%
Subtotal	800.00	USD
Adjustment (Percentage)	-	%
Adjustment (Amount)	-	USD
Reason		Other
Final Line Price	800.00	USD

Calculate Final Price

Agreement Line - Line Details page (5 of 5)

Agreement / Scope Details / Default Entitlements / **Agreement Line** / Billing Details

View Line Summary / Line Details / Installed Products / Entitlements / Sites / Price Information

Agreement Line Details Find | View All First 1 of 2 Last

Line 001 **Status** 2-Active + -

***Start Date** 04/05/2003 ***End Date** 04/05/2007

Description PM on Air Conditioners

Service Preventive Maintenance Service for Air Conditioners

Products Under Service Customize | Find | View All First 1-4 of 4 Last

	Installed Product ID	Description	Serial Number	Asset Tag	Qty	Site
<input type="checkbox"/>	INS0000005	12000 BTU Room Air (Light Beig	SR1003-1001		1.0000	Hillsboro
<input type="checkbox"/>	INS0000006	12000 BTU Room Air (Light Beig	SR1003-1002		1.0000	Palo Alto
<input type="checkbox"/>	INS0000007	12000 BTU Room Air (Light Beig	SR1003-1003	1	1.0000	Redwood City
<input type="checkbox"/>	INS0000008	12000 BTU Room Air (Light Beig	SR1003-1004		1.0000	Riverdale

Add Installed Product Delete Selected Products

Agreement Line - Installed Products page

Agreement \ Scope Details \ Default Entitlements \ **Agreement Line** \ Billing Details

View Line Summary | Line Details | Installed Products | **Entitlements** | Sites | Price Information

Agreement Line Details Find | View All First 1 of 2 Last

Line 001 Status 2-Active + -

*Start Date 04/05/2003 *End Date 04/05/2007

Description PM on Air Conditioners

Service Preventive Maintenance Service for Air Conditioners

Entitlements Customize | Find | First 1-2 of 2 Last

*Description	Type	Minutes	Service Level	Coverage	Percent Covered	Duration	Uplift or Discount		
One day guaranteed response	Response	1440						+	-
Four hour guaranteed restore	Restore	240					15	+	-

Agreement Line - Entitlements page

Agreement \ Scope Details \ Default Entitlements \ **Agreement Line** \ Billing Details

View Line Summary | Line Details | Installed Products | Entitlements | **Sites** | Price Information

Agreement Line Details Find | View All First 1 of 2 Last

Line 001 Status 2-Active + -

*Start Date 04/05/2003 *End Date 04/05/2007

Description PM on Air Conditioners

Service Preventive Maintenance Service for Air Conditioners

Valid Sites Customize | Find | First 1-4 of 4 Last

Select Line Site	Site ID	Description		
Site	482	Hillsboro	+	-
Site	483	Palo Alto	+	-
Site	484	Redwood City	+	-
Site	485	Riverdale	+	-

Agreement Line - Sites page

The screenshot displays the 'Agreement Line - Price Information' page. At the top, there are tabs for 'Agreement', 'Scope Details', 'Default Entitlements', 'Agreement Line' (selected), and 'Billing Details'. Below these are sub-tabs: 'View Line Summary', 'Line Details', 'Installed Products', 'Entitlements', 'Sites', and 'Price Information'. The main section is titled 'Agreement Line Details' and shows 'Line 001' with a status of '2-Active'. It includes fields for '*Start Date' (04/05/2003) and '*End Date' (04/05/2007). The 'Description' is 'PM on Air Conditioners' and the 'Service' is 'Preventive Maintenance Service for Air Conditioners'. A 'Service Pricing' section is expanded, showing 'Purchase Option', 'Prepaid Quantity', 'Prepaid Rate', 'Base Line Price', 'Price Per Transaction', and 'Remaining Quantity' (0.00). There are also dropdowns for 'Prepaid Unit' and 'Transaction Price Unit'.

Agreement Line - Price Information page

Note. If you are creating an agreement for PeopleSoft HelpDesk and selected Internal as the agreement category when you added the agreement, the system does not display the Sites and Price Information sub pages and links.

Agreement Line Tab: View Line Summary

If an agreement has multiple agreement lines, they are listed in the Agreement Lines summary grid (available when you click the View Line Summary link) with basic information such as agreement line and service descriptions, product name, and product ID number. Click the agreement line number link to access the Agreement Line Details group box, where you can edit and view the corresponding line in detail.

If there is only one line in the agreement, the CRM system displays the Agreement Line Details group box together with pricing, site, entitlements, and product information.

When you click the Line Details link at the top of the page, the CRM system displays information for the selected agreement line in group boxes such as Retrieve Base Line Price, Calculate Final Line Price, Entitlements and so on. To minimize the need for scrolling, you can click the Sites, Entitlements, Installed Products, or Price Information links to view corresponding information selectively.

Agreement Line Tab: Line Details - Agreement Line Details

Use this group box to add new lines to the agreement. Enter the status, start and end dates, description and service for the agreement service line. Click the Billing Information link to set up the billing schedule, purchase order, and payment terms information for the agreement line.

Agreement Line Tab: Line Details - Service Pricing

Use this group box to enter purchase option and transactional information for the agreement line service. Click the Price Definitions link to access the Service Pricing page.

Agreement Line Tab: Line Details - Products

Use this section to define the products, purchase options, and prepaid quantity (if there is one). The system displays the prepaid rate, base line price, and base line price unit if it is stored in the system.

To view the transaction price for the product, click the Transaction Price tab. This section displays the transaction price on the corresponding agreement service pricing record. The price is based on the service or service-product combination that is defined for the agreement line.

The CRM system matches the value for the service and product fields on the agreement line with a unique pricing record that contains the same service and product values. In addition, this pricing record must contain the appropriate currency code for the agreement line. Never define more than one agreement service pricing record in the Pricing Information page for the same combination of service, product, and currency code, because this implies multiple prices for a single transaction.

After defining the product and purchase option (prepaid options, if applicable), the other price related fields on this grid are populated when the user clicks the Calculate Final Price button.

When you perform an entitlement search from a case or a service order, the CRM system displays the transaction price or the remaining quantity that is defined on the customer's agreement.

Note. A credit card link on support cases is enabled when the associated agreement line includes a price per transaction and does not entitle the customer to 100 percent coverage of time, material, and expenses.

Purchase Option	Displays the method of purchasing the service or support offering for an agreement or agreement service transaction.
Prepaid Rate, Prepaid Unit, Baseline Price and Baseline Price Unit	<p>Displays the amount paid per unit of work or per unit of time, depending on the purchase option of the agreement.</p> <p>Rates that are retrieved from an agreement service pricing record with a flat purchase option can be by the hour, case, or service order. Rates that are retrieved from an agreement service pricing record with a time and material purchase option can be per unit of time—hour, day, week, month, or year.</p>
Transaction Purchase Option, Transaction Price Unit, Transaction Price, and Currency Code	<p>Displays the transaction purchase option, the price per unit, the total transaction price and the currency.</p> <p>The currency that is displayed for the rate reflects the currency that is entered on the Agreement page of this component.</p>
Remaining Quantity	<p>Displays the amount of the prepaid quantity that has not been used. For field service agreements, the prepaid quantity is in units of service orders or hours.</p> <p>For example, the CRM system reduces this quantity each time a user saves a new service order that is covered by the agreement line. If the service order is canceled, the CRM system readjusts the remaining quantity accordingly.</p> <p>For support agreements, the prepaid quantity is in units of cases or hours. Workflow processes must be implemented to update remaining quantity on support agreements.</p>

Agreement Line Tab: Line Details - Valid Sites

Use this section to add any valid sites to the agreement line. The system displays the site ID and description.

Note. Every line of a site-based agreement must be linked to at least one site.

Agreement Line Tab: Line Details - Products Under Service

Use this section to add or delete any installed products that are covered by the agreement line. The system displays the description, serial number, asset tag (if there is one), quantity, and site where the product is installed.

Use the Add Installed Product and Delete Installed Selected Product buttons to make changes to the products listed under this group box.

Agreement Line Tab: Line Details - Entitlements

This section lists the entitlements that are contractually owed to the customer for an agreement line. These are initially populated by using the set of entitlements that are defined on the Default Entitlements page of this component. You can add or delete entitlements in the grid by adding and deleting rows.

Entitlements Apply To

The system displays a group of fields based on the options you selected on the Agreement Search Configuration page for the business unit you are using. This group box appears only if you are defining an agreement for PeopleSoft HelpDesk, selected *Internal* as the agreement category and selected the *Autoselect Based on Rules* option in the agreement search configuration page.

Use the fields that appear in this group box to link the response and restore times to the different values for the various fields that appear.

For example, if you selected the *Autoselect Based on Rules* option and selected *Role*, *Department*, *Priority*, *Source*, and *Location* as categories that you wanted the system to use when searching for agreements, the system would display all of the fields on this page. However, if you select *User Selects From All Matches*, *Autoselect Shortest Response*, or *Autoselect Longest Response* on the Agreement Search Configuration page, the system does not display this group box.

If you do set values for the fields appearing in this group box, the system uses them to search for agreements when a user selects the Select Agreement link from the Case page.

For example, if you set the Priority field to *Low* on this page, the system would locate this agreement line and use the respond and restore times that you set up on the agreement line for all low priority cases that meet the criteria of the agreement line. This scenario assumes that no other agreement lines match the case on a criterion that was defined with a higher weighting.

Agreement Line Tab: Line Details - Calculate Final Line Price

This section displays the variables that the CRM system used to calculate the final line price for the agreement line.

Note. This section does not appear if you are creating an agreement for PeopleSoft HelpDesk and selected Internal as the agreement category when you added the agreement.

Base Price	Displays the base price for the service or service product combinations of the agreement line.
	Note. For agreement lines with a prepaid purchase option, this value is informational only. The prepaid rate, not the base price, is used to calculate the final line price.
Entitlement Adjustment	Displays the sum of the uplift and discount percentage values that are associated with the entitlements on this agreement line after clicking the Calculate Final Price button.

Subtotal	Displays the subtotal for the agreement line after the base price has been adjusted by the entitlement uplift or discount.
Adjustment (Percentage)	Select the positive (+) or the negative (–) sign from the drop-down list box and then enter a percentage by which you want to adjust the price of the agreement line.
Adjustment (Amount)	Select the positive (+) or the negative (–) sign from the drop-down list box and then enter an amount by which you want to adjust the price of the agreement line.
Reason	Select the reason that you are making the adjustment. If the reason is not listed in the drop-down list box, click the Other link and enter the reason in you are making the adjustment.
Final Line Price	<p>Displays the final price for the agreement line. For agreement lines with a flat or time-and-material purchase option, this value equals to:</p> <p>Sum of the Duration-adjusted Base Price \times Installed Product Quantity</p> <p>For prepaid agreement lines, this value equals to:</p> <p>Sum of the Prepaid Quantity \times Prepaid Rate \times Entitlement Adjustment for each product entry</p>
Calculate Final Price	Click this button to calculate the final price for the agreement line. The system retrieves all appropriate service or service/product prices, calculates subtotals and adds and subtracts any discounts or adjustments that you have made to the base price.

Agreement Line Tab: Installed Products

The section lists all of the installed products that matched a product ID contained in the product grid for the Agreement Line. If the agreement covering the service order has a scope of *Site*, the installed products are limited to those that match the sites that are covered by the agreement line.

The CRM system displays the Products Under Service grid if you select to view line details or just the installed product information of the agreement line.

It lists the customer's installed products that are eligible for the service or support specified on the agreement line. Installed product information must be added manually to the agreement.

When installed products are added to an agreement line, the CRM system automatically updates them on the agreement line whenever replacements are made at the customer's site (changes are recorded using the Manage Material component).

Before selecting an installed product, you must define a product for the agreement line, and, for agreements with a scope of *Site*, select the sites that will be covered by the line.

If the scope of the agreement is *Contact*, the installed product choices are limited to those that match the product and customer specified. You can never select installed products with a status of Uninstalled.

Agreement Line Tab: Entitlements

This section lists the entitlements that are contractually owed to the customer for an agreement line. These are initially populated by using the set of entitlements that are defined on the Default Entitlements page of this component.

Agreement Line Tab: Sites

The section lists all of the sites associated with the agreement line that were entered on the Scope Details page. You can add or delete sites displayed in the grid by adding and deleting rows.

Note. This section does not appear if you are creating an agreement for PeopleSoft HelpDesk and selected Internal as the agreement category when you added the agreement.

Agreement Line Tab: Price Information

Use this group box to enter purchase option and transactional information for the agreement line. Click the Price Definitions link to access the Service Pricing page.

For more information and field descriptions, refer to the Line Details - Products section for the Agreement Line Tab.

Note. This section does not appear if you are creating an agreement for PeopleSoft HelpDesk and selected Internal as the agreement category when you added the agreement.

See Also

[Chapter 23, “Setting Up and Managing Agreements and Warranties,” Specifying Default Entitlements, page 364](#)

[Chapter 25, “Performing Entitlement Searches for Cases and Service Orders,” page 391](#)

[Chapter 23, “Setting Up and Managing Agreements and Warranties,” Specifying Default Entitlements, page 364](#)

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

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

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

Defining Billing Information

Access the Billing Details page.

Note. This page does not appear if you are creating an agreement for PeopleSoft HelpDesk and selected Internal as the agreement category when you added the agreement.

Agreement

Save | Search | Add | Next | Previous | 360 360-Degree View | Personalize

Agreement Code COM-AGR-101
Customer Health Conscious.com
Contact
Category External

SetID CRM01
Customer Value Gold☆☆☆☆
Status Active
Scope Site

Agreement | Scope Details | Default Entitlements | Agreement Line | **Billing Details**

Customer Information

Bill To Customer Health Conscious.com
Bill To Contact Gabrielle Sanchez
Bill To Address 6544 San Tomas Blvd, San Jose, CA
Currency Code USD US Dollar

Payment Information

Purchase Order
☒ **Invoice** **Payment Terms**
☐ **Credit Card** [Credit Card Information](#)
[Tax Parameters](#) **Schedule** ANNUAL

Billing Details page (1 of 2)

Billing Information

Expand All | Collapse All

Line	Service	Product	Price	+/-	Adjustment	Type	Reason	Extended Price
001	PM for A/C	12000 BTU Room Air (Light Beig	800.00	-		Amount		Other 800.00
002	Repair A/C	12000 BTU Room Air (Light Beig	162.00	-		Amount		Other 162.00
Subtotal								962.00
Additional Adjustment								- 5.00 Percent Other -48.10
Total								913.90 US

Recalculate Totals | Clear Adjustments

Audit History

Billing Details page (2 of 2)

Customer Information

These fields capture information to determine how much to charge the customer for the agreement and the method of remittance that the customer uses.

Bill to Customer

Select the customer that should be billed for the service. The primary customer appears by default in this field.

Bill To Contact

Select the contact that should be billed for the service. The primary contact appears by default in this field.

Bill To Address

Select the bill to customer address to which the bill should be sent. The primary bill to address appears by default in this field.

Currency Code

Select the currency that the customer is using for the transaction.

The currency name appears to the right of the field. When the information is sent to PeopleSoft Contracts, the system prints the name of the currency on the invoice. The base currency of the sold to customer appears by default in this field.


Payment Information

Purchase Order	<p>Enter the customer-provided purchase order number.</p> <hr/> <p>Note. This field does not have any integration to PeopleSoft Supply Chain Management (PeopleSoft SCM) and is not required. If you enter a purchase order number in this field, the system posts it to PeopleSoft Contracts. When PeopleSoft Contracts sends the information to PeopleSoft Billing for invoice generation, the system prints the purchase order number on the invoice.</p> <hr/>
Invoice	<p>Select if the customer intends to pay for the service by invoice.</p>
Payment Terms	<p>If you selected the Invoice option, use this field to select the payment terms for the invoice (for example, <i>NET30 - Due in 30 days</i>). The payment terms appear on the invoice that is sent to the customer.</p>
Credit Card	<p>Select if the customer intends to pay for the service by credit card. The system displays the Credit Card Information link after you select this option.</p>
Credit Card Information	<p>Click to access the Credit Card Details page, where you enter credit card authorization information, such as the card type, card number, expiration month, and year. The system displays the authorization status, date, and code on the Transactions Results page after you click the Submit Transaction button on the Credit Card Details page.</p> <hr/> <p>Note. You can integrate credit card information with Cybersource, a third-party taxware vendor.</p> <hr/> <p>See <i>PeopleSoft Enterprise Components for CRM 8.9 PeopleBook</i>, “Setting Up the Credit Card Interface”</p>
Tax Parameters	<p>Click this link to access the Tax Parameters page. Use this page to indicate whether the customer is exempt from taxes. If the customer is tax exempt, enter the exemption certificate number and tax code that the customer supplies to you.</p> <p>The system uses a default tax code based on the customer’s address, but you can override it by choosing another value.</p>
Schedule	<p>Select the schedule to indicate the way in which the revenue needs to be recognized in the general ledger. The system synchronizes this information from the general ledger.</p>

Billing Information

Managers can use this section to adjust the fees by increasing or decreasing a fee by a percent or by an amount.

The system does not use the new price in the totals until a user clicks the Recalculate Totals button. The system then calculates the sum of all active or closed lines, including those that have changed, and provides the recalculated amount in the Total Amount field.



Click the Expanded button to the left of the Line column to view all billable amounts that were included in the price for a given fee.

+/-	Select the positive (+) or the negative (–) sign from the drop-down list box and then enter the number by which you want to adjust the price of the agreement line.
Adjustment	Enter the number, either a percentage or an amount, by which you want to make an adjustment.
Type	Select <i>Percent</i> or <i>Amount</i> .
Reason	Select the reason for the adjustment. These values are user-definable. You define reason codes on the Reason Code page (select Set Up CRM, Common Definitions, Codes and Autonumbering, Reason Codes). Use <i>Agreement Billing Adjustment</i> , <i>Case Billing Adjustment</i> or <i>Svc Order Billing Adjustment</i> as the reason type when you setting up your reason codes. See <i>PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook</i> , “Setting Up Call Center Prompt Tables,” Setting Up Reason Codes.
Other	If the predefined values for the Reason field do not describe the reason for the adjustment, click this link to access the Other Reason page where you can enter a unique description of the reason.
Extended Price	This value is calculated when you click the Recalculate Totals button. The system sums the total of the price, plus or minus any adjustments.
Recalculate Totals	Click this button any time there is a change to the Billing Details grid that impacts the price or the currency code. The system recalculates the total cost of the fees.
Clear Adjustments	Click this button to clear the adjustments that were made and return to the original total amounts.

Defining Warranties

This section provides an overview of warranty definitions and discusses how to define warranties.

Understanding Warranty Definitions

Use the Warranty component to define the duration and entitlements that are associated with a warranty. Defined warranties are associated with items on the Item Definition page.

For any item that is linked to a warranty, the CRM system automatically populates warranty information to all installed products that are created for that item. However, you can manually update or delete the associated warranty for an individual installed product.

For items that are installed at a customer’s site, you can activate the warranty on a customer’s installed product by using the Installed Product component. When searching for entitlements for a product on a case or service order, the CRM system first checks for a valid warranty on the customer’s installed product before checking for entitlements on an agreement.

See Also

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

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

Chapter 25, “Performing Entitlement Searches for Cases and Service Orders,” page 391

Page Used to Define Warranties

Page Name	Object Name	Navigation	Usage
Warranty	RF_WARRANTY	Customer Contracts CRM, Agreements, Warranties, Warranty	Define product warranties.

Defining Warranties

Access the Warranty page.

Warranty

Warranty Name PREMIUM-COM
SetID CRM01

Warranty Details

*Description Premium Warranty for Commercial customers

Provider Service Organization

Critical Times

Warranty Length 18
Days for Refund 30

Unit Month
Days to Return 60

Starts Ship
Days For Replacement 90

☐ RMA Required
☐ Walk-in Allowed




















☐ Warranty Transferable
☐ On-Site Repair

☐ Invoice Required
☐ Shipment Allowed

☐ Loaner Provided

Entitlement Plan Name PREMIUM

Warranty page (1 of 2)

Entitlements		Customize	Find	First	1-6 of 6	Last
*Description	Entitlement Minutes	Service Level	Coverage Type	Percent Covered	Duration	Uplift / Discount
One hour guaranteed response 	60					15  
Four hour guaranteed restore 	240					15  
Premium Service Level 		Premium				10  
Premium Expense Coverage 			Expenses	75	1 Year	10  
Premium Material Coverage 			Material	75	1 Year	10  
Premium Time Coverage 			Time	75	1 Year	10  
 Audit History						

Warranty page (2 of 2)

Warranty Details

Provider

Select the organization that absorbs the cost of the services that are covered by the warranty. Options include: *Manufacturer, Retailer, or Service Organization.*

Critical Times

This section details the periods of coverage for the warranty. If an installed product is under warranty, its default start date is determined by the ship date, installation date, or order date of the installed product, as applicable. The CRM system calculates the end date by adding the warranty length to the start date.

Warranty Length

Enter a number value to represent the length of the warranty.

Unit

Select the time unit of measure for the warranty period. The values are: *Day, Month, Week, or Year.*

Starts

Select when warranty coverage begins.

Install: Coverage begins the date when the item is installed at the customer site.

Order: Coverage begins the date when the item is ordered.

Ship: Coverage begins the date when the item is shipped to the customer.

Days for Refund, Days to Return, and Days For Replacement

Enter the number of days from the date in the Starts field during which the customer is entitled to return the item for a full refund, return the item to receive credit for the price of the item, or return the item in exchange for a replacement item.

Use the check boxes in the center of the page to indicate, for informational purposes, how warranty services are provided.

RMA Required (return material authorization required)

Select if installed products under warranty must be returned for warranty services by using RMA processing.

Walk-in Allowed

Select if the customer can bring installed products under warranty to your repair center.

Warranty Transferable

Select to keep the warranty in effect for the new owner if ownership of the installed product changes.

On-Site Repair	Select if installed products under warranty can be serviced at the customer's site.
Invoice Required	Select if the customer must provide a copy of the invoice for an installed product under warranty before warranty services can be performed.
Shipment Allowed	Select if the customer can ship installed products under warranty to your repair center.
Loaner Provided	Select if the customer will be loaned a similar item while the installed product under warranty is being repaired.
Entitlement Plan Name	Select a default entitlement plan from the Entitlement Plan Name field to initially populate the grid with a predefined set of entitlements.

Entitlements

Use this section to add or delete entitlements from this set as necessary. Entitlement plans are established on the Entitlement Plan Setup page. You can also manually enter all entitlement entries into the Entitlements grid without entering an entitlement plan name to pre-populate the grid.

Warning! If you change the entitlements that are offered by an existing warranty, you also change the entitlements for any installed product that is covered by the warranty. When a warranty has been associated with an installed product, you should not modify the warranty definition on the Warranty page. Instead, define a new warranty with the required entitlements and update the warranty information on the Item Definition page.

The CRM system displays the information that is associated with set of entitlements as defined on the Entitlements page.

See Also

[Chapter 23, "Setting Up and Managing Agreements and Warranties," Understanding Agreements and Warranties, page 337](#)

[Chapter 23, "Setting Up and Managing Agreements and Warranties," Defining Entitlements, page 346](#)

[Chapter 23, "Setting Up and Managing Agreements and Warranties," Defining Entitlement Plans, page 348](#)

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

Generating Sales Leads for Agreement Renewal

This section provides an overview of lead generation for agreement renewal and discusses how to set it up

Note. This feature is only available to customers have licensed PeopleSoft Sales and PeopleSoft Integrated FieldService.

Understanding Lead Generation for Agreement Renewal

To help you sustain company revenue and be proactive about contract renewals for the established customer base, set up PeopleSoft CRM to retrieve agreements that are expired or about to expire and generate sales leads for them. Like other leads, the leads that are created for agreement renewal appear on the Search Leads page for the sales team with *Agreement* as the lead source.

Lead Generation for Expiring and Expired Agreements

PeopleSoft CRM uses an application engine (AE) program, which runs on a daily basis (recommended setting) to look for agreements that are about to expire or have recently expired (based on the number of lead days that are defined by user) and create leads for them.

When the AE program runs, it searches for agreements that are associated with the sales business unit that is specified on the run control page. Because sales leads are keyed by business unit and agreements are by setID, the CRM system performs a business unit-setID mapping exercise in the background to determine which setID corresponds to the selected sales business unit. All agreements in that setID will be processed, and all leads that are subsequently created will belong to the specified sales business unit.

Note. Only agreements with the status of *Available* will be selected by the AE program for evaluation. The AE program does not process agreement templates.

Among all available agreements in the given setID, the AE program generates sales leads for those whose expiration date falls between the start and end dates of a time period that is calculated by using the user-defined lead time. The start and end dates are calculated by using this formula:

(Start Date) = (Current Date) - (Agreement Renewal Lead Time)

(End Date) = (Current Date) + (Agreement Renewal Lead Time)

For example, the AE program is scheduled to run today on October 15, and the lead time (in number of days) that is defined at the installation level is 7. For any agreement with an expiration date between October 8 through October 22, a sales lead is generated by the lead generation process.

When you look up a sales lead for agreement renewal from the Search Leads page, agreement-specific information, such as agreement code and renewal number, is available on the Source tab as reference. You can also transfer to the read-only version of the agreement from the lead.

For agreement renewal purposes, an agreement can only be associated with one sales lead at a time. The agreement is not selected by the AE program if a sales lead was already generated for it. In addition, the CRM system does not generate sales leads for agreements that are already renewed.

Setting Up Lead Generation for Agreement Renewal

This section discusses how to:

- Define lead time for generating leads.
- Generate leads for expiring agreements.
- Access leads that are generated for agreements.

Pages Used to Set Up Lead Generation for Agreement Renewal

Page Name	Object Name	Navigation	Usage
General Options	RB_INSTALLATION	Set Up CRM, Install, Installation Options, General Options	Define how many days before or after an agreement expiration date that a sales lead should be generated.
Sales Lead Generation for Agreement Renewal	RUN_CNTL_RFLEAD	Customer Contracts CRM, Agreements, Lead Generation, Sales Lead Generation for Agreement Renewal	Start a batch process that runs on a daily basis (recommended) to generate sales leads for agreements that are about to expire or have recently expired.
Lead - Discover	RSF_LEAD_ENTRY	Sales, Search Leads, Discover	Access sales leads that are generated for agreements.

Defining Lead Time for Generating Leads

Access the General Options page.

In the Agreement Renewal Lead Time field, enter the number of days before expiration that an agreement is eligible for the lead generation process. This is also the number of days after expiration that the agreement is still eligible for the process. By default, this value is set to 90 days.

See [Chapter 3, “Setting Up General Options,”](#) page 17.

Generating Leads for Expiring Agreements

Access the Sales Lead Generation for Agreement Renewal page.

Sales Lead Generation for Agreement Renewal page

In the run control page, select a sales business unit for which leads will be created for expiring agreements after the AE program (RF_AGR_LEAD) is run.

Note. The AE process should be run on a daily basis.

Accessing Leads That Are Generated for Agreements

Access the Lead - Discover page.

Lead

Save | Add | Notify | Email | Clone | Convert | 360 360-Degree View | Previous | Search | Personalize

Description Renewal of agreement COM-AGR-102 **Status** Open
Customer Health Conscious.com **Customer Value**
Contact **Rating**

Summary | **Discover** | Assign | Qualify | Propose | Tasks | Notes | History

Customer

Customer Health Conscious.com [Search Again](#)

Address [Go](#)

Site San Jose [Search Again](#)

Address [Go](#)

Partner

Partner **Contact**

[Search](#) [Advanced Search](#)

Lead - Discover page (1 of 2)

Lead Details

***Description** Renewal of agreement COM-AGR-102 **Business Unit** US200 [Search](#)

Sales Rep Ralphs, Sandy Mountain [Search](#) **Revenue** **Currency** USD [Search](#)

***Status** Open [Go](#) **Rating** **Priority** 5 [Go](#)

Contacts

No contacts have been selected. Press Add button to view all contacts for this customer.

First Name **Last Name** [Add](#)

Accept/Reject Lead

[Accept](#) [Reject](#) [Turnback](#)

Related Transactions

[Assign Team](#) | [Add Product](#) | [Create Quote](#) | [Add Task](#) | [Add Note](#)

Lead - Discover page (2 of 2)

Open a sales lead that is generated for agreement renewal purposes. You can click the Agreement link to access the agreement that needs to be renewed. The name of the agreement is listed is part of the lead name.

See Also

PeopleSoft Enterprise Sales 8.9 PeopleBook, “Creating Sales Leads and Opportunities”

CHAPTER 24

Defining Pricing Information for Services and Support Offerings

This chapter provides an overview of pricing records and discusses how to establish pricing records.

Establishing Pricing Records

This section provides an overview on pricing records and discusses how to establish pricing records.

Understanding Pricing Records

This section discusses:

- Pricing records.
- Types of pricing records.
- Products, services, and service activities on pricing records.
- Pricing records for each currency.
- Purchase options.
- Pricing structures on agreements.

Pricing Records

You use the Pricing Information component in PeopleSoft CRM to define pricing records for service and support offerings. The system uses the pricing structure that you define to calculate prices on agreements. When creating service orders and cases, you can use the Pricing Information component to look up the price for work not covered by an agreement, such as on-demand service or support calls, or an additional service activity that is not included in the service on the customer's agreement. The system, however, automatically populates the price defined on the Pricing page for the transaction.

Note. With the pricing records that you define in the Pricing Information component, PeopleSoft CRM can calculate agreement prices. It can also price on-demand transactions for cases and service orders as well as service fees.

Types of Pricing Records

You can define pricing records for five types of transactions: agreements, agreement services, agreement cases, on-demand services, and on demand cases.

Agreement pricing records define the fee that the customer pays for an agreement that covers a specific service or support offering. The agreement price is paid when the agreement is issued to or signed by the customer. In addition, PeopleSoft supports the ability to pay for the agreement on a recurring basis.

Agreement service or case pricing records define what the customer pays when the work that is associated with the service or support offering on the agreement is performed.

On-demand pricing records define the amount that a customer pays for services that are not covered by an agreement. Typically, on-demand prices are higher than agreement services prices. By purchasing an agreement, the customer may receive a discount on the normal price of a service or support offering.

Products, Services, and Service Activities on Pricing Records

The prices that you define for agreements, agreement services, agreement cases, on demand case and on-demand service pricing records can define rates for a service, a product, or both a service and a product. Pricing records that only specify products are used by call centers to define rates for supporting specific products and are identified as an agreement case or an on-demand case. Field service organizations define pricing records for a service or for a combination of a service and a product and are identified as agreement service or on-demand service.

When calculating pricing on an agreement, the system checks first for a price for the service-product combination. If none is defined, the system uses the price that is defined for the service alone. For support-based agreements, the agreement price is based on prices defined for products only.

You can also define rates for service activities and combinations of products and service activities. These pricing records enable you to adjust a customer's invoice when he or she requests additional service activities that are not included in the service.

For example, at the time that a customer requests a service that is covered by an agreement, you might want to offer the ability to upgrade the service by adding additional service activities to the basic service that is covered by the agreement. You can define a fee for each service activity that the customer adds to the basic service. Note that you can define a pricing record for a service or a service activity, but not both.

Pricing Records for Each Currency

Every pricing record defines a rate in a specific currency. You must define a complete set of pricing records for each currency that is valid for agreement, agreement service, agreement case, on demand case and on-demand service transactions in your business. When you create an agreement, you can reference the pricing records for only one currency.

Purchase Options

You can define prices for three types of purchase options: flat, prepaid, and time and material.

A flat purchase option specifies a set price for a service or support offering on an agreement, an agreement service, or an on-demand service pricing record. A flat rate for an agreement is expressed in a time-based unit of measure, such as hours, days, weeks, months, or years.

For an agreement service, on-demand service, agreement case, or on-demand case, flat rates are expressed in units of work, such as per case or per service order. The flat rate is expressed as an amount to be paid for each installed product that is covered by that service. For example, if a flat rate is defined as 100 USD per year for a service, and the agreement line that references that service has two installed products, the line price would be calculated as 200 USD for one year.

With the prepaid purchase option, customers pay for a specified quantity of a service or support offering at the time that they purchase the agreement. The prepaid purchase option applies only to agreement pricing records. You define a price for a set quantity of cases or service orders, or a price for a certain number of hours worth of work.

You may define different prices for the same service or service-product combination for different prepaid quantities; for example, 100 USD per service order when prepaying 20 service orders, and 90 USD per service order when prepaying 50 service orders. The prepaid quantity of cases or service orders is saved on the agreement, and the value is decreased when a case or service order is created to account for the consumption.

If the case or service order is subsequently canceled, the quantity is added back to the agreement. If the prepaid quantity is in units of hours, the system decreases this quantity each time a technician or agent uses the Manage Time component to report time that is spent (total hours) on a service order or case that is covered by the agreement line.

The time and material purchase option defines a rate for the labor time that is required to perform the requested work. This rate is always expressed as a time-based unit of measure and applies only to agreement and on-demand service and case pricing records. Material is not directly accounted for by the time and material purchase option. However, you can track material usage for service orders and manually account for the material when creating the customer's invoice.

This table summarizes the valid data combinations on a pricing record and provides an example for each combination:

Applies To	Purchase Option	Unit	Prepaid Quantity	Example
Agreement	Flat	Time-based (hour, day, week, month, year).	Not allowed	200 USD per year.
Agreement	Prepaid	Case, service order, or hour.	Required	30 USD per service order for a prepaid quantity of 15.
Agreement service/case	Time and material	Time-based (hour, day, week, month, year).	Not allowed	40 USD per hour.
Agreement service/case	Flat	Case or service order.	Not allowed	45 USD per service order/case.
On-demand service/case	Flat	Case or Service order.	Not allowed	55 USD per service order/case.
On-demand service/case	Time and material	Time-based (hour, day, week, month, year). For cases it's only hour.	Not allowed	75 USD per hour.

Pricing Structures on Agreements

On agreements, you can set up pricing structures that use various combinations of pricing records.

For example, your business might offer a five-year preventive maintenance (PM) service agreement for air conditioners. For an agreement price of 500 USD, a service technician will perform preventive maintenance tasks on a customer's air conditioner for five years.

For customers who buy this agreement, you also offer repair services for 75 USD per service call—a 50 percent discount off your on-demand rate. To support this agreement scenario, you define an agreement pricing record with a flat purchase option for preventive maintenance service of 100 USD per year. You also define an agreement service pricing record for your air conditioner repair service for a flat rate of 75 USD per service order. Your on-demand pricing record for the same service would be 150 USD.

After defining your pricing records, you create an agreement with a five-year duration that references the agreement and the agreement service pricing records. The customer who buys the agreement pays 500 USD and receives preventive maintenance service for five years. If the customer's air conditioner requires repair services, the customer pays 75 USD per repair service order for the duration of the five-year agreement.

Note. Prepaid quantity is a fixed amount per contract, not per year. In this case, if someone were to prepay for 10 PM visits (regardless of agreement duration), you can define a prepaid price of 50 USD per service order for a quantity of 10 service orders. An alternate arrangement would be to define a flat rate of 100 USD per year for unlimited PM service. For a five-year agreement, this would cost 500 USD for unlimited PM service.

See Also

[Chapter 23, “Setting Up and Managing Agreements and Warranties,” page 337](#)

Page Used to Establish Pricing Records

Page Name	Object Name	Navigation	Usage
Service Pricing	RF_SVC_PRICE	Pricing Configuration, Service Pricing, Service Pricing	Establish pricing records for service and support offerings.

Establishing Pricing Records

Access the Service Pricing page.

Service Pricing

Enter or select the criteria you want to appear in the list of Prices and press Search.

▼ Search Filter

SetID CRM01

Service PM for A/C

Activity

Purchase Option Flat

Product ID

Applies To Agreement Service

Currency Code USD

Search

Clear

View and update Prices in the list below.

Prices

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

Applies To Information

Rate Information

*Applies To	*Purchase Option	Service	Product ID	Description	Activity		
Agreement Service	Flat	PM for A/C	10011	Air Cond, Control Unit			
Agreement Service	Flat	PM for A/C	SR1002	6000 BTU Room Air (Grey)			

Pricing Information page

Note. To establish pricing for products that you sell, use the Price page under Products CRM. Also, material costs for items are stored in the inventory system.

Search Filter

Select pricing information that meets a specific set of criteria. Enter the criteria and click the Search button. If you click the Search button without specifying any criteria, the system returns all pricing records that are defined for the setID.

Service Select a service to limit the search to pricing records that are defined for a specific service. You define services by using the Services component. Click the Transfer to Service button to access the Services component. Services are not relevant to pricing for support agreements.

Activity Select a value to limit the search to pricing information that is defined for a specific service activity. You use the Service Activity Code page to define activities. Click the Transfer to Activity button to access the Service Activity Code page.

Note. Search criteria can include a service or an activity, but not both. These fields are mutually exclusive on the pricing record.

Purchase Option Select a value to limit the search to pricing records for the specific purchase option: *Flat*, *Prepaid*, or *T&M* (time and material).

Product ID Select a value to limit the search to pricing records for specific product. You establish products in PeopleSoft CRM by using the Product EIP or the Product Definition component.

Applies To Select a value to limit the search to pricing records for the specific applies to option: *Agreement Case*, *Agreement Service*, *On Demand Case*, or *On Demand Service*.

Currency Code Select a value to limit the search to pricing records for a specific currency. You establish currencies on the Currency Code page.

Prices

The system displays the pricing information records that meet the search criteria.

Applies to Information

Applies To Select the transaction that the pricing record applies to: *Agreement*, *Agreement Case*, *Agreement Service*, *On Demand Case*, or *On Demand Service*.

Purchase Option Select the purchase method for the service or support offering: *Flat*, *Prepaid*, or *T&M* (time and material).
The *Prepaid* option applies only to pricing records for agreement transactions.
The *T&M* option applies only to pricing records for agreement service, agreement case, on demand case and on demand service transactions.

Service Select the service that the pricing applies to, if applicable. You use the Services component to define services. Click the Transfer to

Service button to access the Services component. Services are not relevant to pricing for support agreements.

Product ID

Select the product that the pricing record applies to, if applicable. Click the Transfer to Product button to access the Products component.

If you specify both a product and a service on a pricing record, the price applies only to that particular service-product combination. Pricing records that specify products are used only by call centers to define rates for supporting specific products.

Activity

Select the service activity that the purchase option applies to. You can define pricing records for service activities or combinations of service activities and products. You can define a pricing record for a service or an activity, but not both.

You can use service activity price information to adjust a customer's invoice when activities are added to a service that is covered by an agreement. The system displays the information on the Billing page for the service order or case.

Rate Information

Currency Code

Select the currency of the rate amount. You must define a complete set of pricing records for service and support offerings for each currency that you use.

Rate Amount

Enter the amount that is charged per the specified unit in the specified currency.

Unit

Select the unit of work that is associated with the rate amount. Depending on your Applies To and Purchase Option field selections, you can specify a rate for the following work units: *Day, Hour, Month, S.O. (service order), Case, Week, or Year.*

Prepaid Quantity

Enter the number of work units of a service or support offering that a customer pays for in advance. This value applies only to the *Prepaid* purchase option.

See Also

Chapter 24, "Defining Pricing Information for Services and Support Offerings," Understanding Pricing Records, page 385

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

Chapter 23, "Setting Up and Managing Agreements and Warranties," page 337

PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook, "Setting Up Services"

PeopleSoft Inventory 8.8 PeopleBook

CHAPTER 25

Performing Entitlement Searches for Cases and Service Orders

This chapter provides an overview of entitlement searches and discusses how to perform searches.

Understanding Entitlement Searches

This section discusses:

- Entitlement searches.
- Minimum information that is required to perform entitlement searches.
- Warranty matches.
- Agreement matches.
- Service level suspensions for PeopleSoft HelpDesk.
- Delay Notifications
- Workflow

Entitlement Searches

Entitlements define what a customer is contractually owed for the service or support offering on an agreement line or warranty. When you perform an entitlement search on the Service Order page or Case page, the system searches for valid agreement lines or warranties that cover the work on the service order or case and displays the associated entitlements.

The system uses the values that you entered in the fields for product ID, serial number, and either site or site identification number (SIN) to search for agreement line and warranty matches for service orders. For cases, the system uses the same fields as well as those for contact or personal identification number (PIN).

For support cases, the system passes customer, contact, product ID, serial number, case ID, PIN, SIN, and site as the search criteria for entitlement searches. For help desk cases, the system passes employee, case ID, product, asset tag, priority, source, department, location and employee role (defined as manager level in the Worker component) to the search.

Note. The system only passes the priority, source, department, location and employee role information to PeopleSoft HelpDesk searches based on the relevant settings for the Agreement Search Configuration page. That is, they are not considered if the internal agreement search option is set to *User Selects from All Matches*, *Autoselect Longest Time* or *Autoselect Shortest Response Time*.

If the system renders more than one warranty or agreement line that match the available search criteria, you can select the appropriate one from the entitlement match list that is generated by the system. When you make a selection, or if the CRM system finds only one match, the entitlement information of the selected agreement line or warranty is automatically populated to the service order or case. You can view the entitlement details directly on the service order or case.

Minimum Information That Is Required to Perform Entitlement Searches

Before you perform an entitlement search, you must provide a customer or employee that is associated with a case or service order. Additionally, an entitlement search on cases requires one of the following: contact, product ID, serial number, case ID, PIN, SIN, or site.

Besides customer or employee, the case search requires only one of the following: contact, PIN, site, or SIN. The product ID and serial number or asset tag number are optional but are recommended because they focus the search to a much greater degree.

For entitlement search on service orders, you need to provide a site ID or SIN in addition to the customer. You can further limit the search by entering a product ID (or the installed product ID, which is identified by the serial ID on the service order).

When entering information on the case or service order, the system uses the product ID that you enter to select appropriate installed product records for the customer. If you do not enter enough information to uniquely identify an installed product (which is displayed in the Serial ID field), all the matching entitlements are returned

Warranty Matches

If an installed product is entered on the service order or support case, the system first checks for a valid warranty that applies to the installed product. The system identifies the installed product by using the serial number that appears on the case or service order.

When an installed product is specified on the service order or support case, the system checks for the following conditions:

- The installed product is associated with a warranty.
- The current date is equal to or later than the warranty start date.
- The current date is equal to or prior to the warranty end date.
- The status of the warranty is *Active*.

If all conditions are met, the system returns the warranty as a match. The system does not return, and you cannot select, warranties from searches for a PeopleSoft HelpDesk case.

Agreement Matches

The CRM system searches for agreement line matches in addition to any warranty matches that are found. For an agreement to be considered for the entitlement search, the current date must fall on or between the start and end dates on the agreement line, the agreement line must have a status of *Active*, and the agreement itself must have a status of *Active*. The customer who is listed on the service order or support case must match the customer who is identified on the agreement. For help desk cases, agreement searches do not have to match the employee. You can, however, have an internal help desk agreement that applies to all employees.

Note. The internal PeopleSoft HelpDesk agreement always applies to all employees, except when the user has selected *Autoselect Based on Rules* on the Agreement Search Configuration page for internal agreements and has applied the various rules to individual agreement lines to limit the applicability of those lines to certain groups of employees based on role or department

If a SIN is entered, the CRM system returns all agreement lines whose site matches the site linked to that SIN on agreements with a scope of *Site*. If a site ID but not a SIN is provided, the system returns all agreement lines that match the site ID.

Note. On a case in which a site ID was previously selected, the CRM system limits the selection of installed products to those that are specified for that site. On a service order in which a site ID was previously selected, the system limits the selection of products and installed products to those that are available to the selected site only.

If you enter a PIN, the system returns all agreement lines whose contact (named caller) matches the PIN on agreements with a scope of *Contact*. If a contact but not a PIN is provided, the system returns all agreement lines where the contact is listed as the named caller.

Note that field service agreements only use authentication by site or SIN (not by named callers). Therefore, no PIN field exists on the service order, and the contact's person ID is not matched against PIN entries in agreements.

If an installed product is identified on the case or service order, the system returns all agreement lines that list the installed product as a product under service. Agreement lines that cover the corresponding product ID and do not list individual installed products (for example, agreement lines that provide blanket coverage) are also returned.

Note. The Agreement Search Configuration page enables you to choose the rules on how you want the system to return lines for agreement searches. For PeopleSoft Support, Integrated FieldService, and HelpDesk you can enable the system to search for agreements based on the shortest or longest response times; or let the user select from all matches. Additionally, for PeopleSoft HelpDesk only, you can set up specific rules by which the system will search for agreements.

Service Level Suspensions for PeopleSoft HelpDesk

When a service level agreement (SLA) cannot be met for justifiable reasons, an agent using PeopleSoft HelpDesk can change a case to the *On Hold* status. In this situation the system sends a suspension notification to the agent's manager. This also applies to PeopleSoft Support.

When the agreement is applied, the system sends out a delayed notification to remind the agent, provider group or call center manager of a potential SLA delay.

The system stops the clock for the service agreement and clears the response and restore dates and times. When the case is activated again, the agent or manager changes the case status back to *Open*. When this happens the clock resumes from where it left off and the response and restore dates and times are recalculated to reflect the on hold period.

To facilitate these processes, PeopleSoft delivers these notifications and workflow exceptions:

Delay Notifications

PeopleSoft delivers these notification as sample data

- Response
 - For delays of 2 hours, the system sends a notification to the agent regarding initial response if it's not met yet. If no agent is assigned to the case, system sends notification to the provider group. If no provider group is defined on case either, the system send notification to the call center manager.
 - When the delay reaches 100 percent of the response time, the system sends a notification to the agent and manager regarding the response exception and sets the service agreement response met flag to *No*.
- Restore

- For delays of 2 hours, the system sends a notification to the agent warning of potential service agreement exceptions (the same change as response.)
- When the delay reaches 100 percent of the restore time, the system sends a notification to the agent and manager regarding the restore exception and sets the service agreement restore met flag to *No*.

Workflow

This is general workflow delivered for SLA, not workflow exceptions. PeopleSoft delivers these workflow as system data:

- SLA Start

When a case is associated with a service agreement or warranty, the system triggers an SLA start event to create an event history entry with an agreement code or warranty name.

- Delayed Notification

When service starts, the system schedules delayed notifications. The system sends an initial notification to the agent, provider group, or call center manager regarding call back or warning of potential exceptions.

- SLA Response Met

When a case is responded to within entitled response time, the system triggers an SLA Response Met event and creates an event history record.

- SLA Restore Met

When a case is closed within entitled restore time, the system triggers an SLA Restore Met event and creates an event history record.

- SLA Response Exception (Application Engine process)

This workflow exception is scheduled as a delayed Application Engine process when service starts. When the service response is not met, the system wakes up the Application Engine program. The program calls the component interface (CI) to set the response met flag to *No*, and then triggers the SLA Response Exception workflow.

- SLA Response Exception (workflow)

When the response met flag is set to *No*, the system sends a notification to the agent and manager and inserts a record into event history.

- SLA Restore Exception (Application Engine process)

This workflow exception is scheduled as a delayed Application Engine process when service starts. When a case is still open at the time restore is reached, the system wakes up the Application Engine program. The program calls the CI to set the restore met flag to *No*, and then triggers the SLA Restore Exception workflow.

- SLA Restore Exception (workflow)

When the restore met flag is set to *No*, the system sends a notification to the agent and manager and inserts a record into event history.

- SLA Change

Users with the change privilege can open the case, clear the service agreement, change the search criteria (changing priority or source is mainly for PeopleSoft HelpDesk users. For PeopleSoft Support, users with privilege can clear the SLA, change other items, and reattach the SLA. Additionally, they can attach another service agreement based on the new criteria. This workflow event triggers the SLA Change workflow to create an event history entry indicating a new service agreement code. As such, a new service agreement cycle starts. The system also cancels any outstanding service agreement exception workflows and triggers the rescheduling of the service exception. The user can detach the SLA in select the SLA section for a case. PeopleSoft delivers sample data so that only call center managers and help desk managers can detach an SLA.

- **SLA Suspension**

When an agent changes a case status to *On Hold*, the system triggers an SLA Suspension event. The system sends a notification to the manager. It also cancels any outstanding delayed notifications and service exception workflows.

- **SLA Resume**

When a manager declines the service agreement suspension or the case is ready to be worked on again, the manager or agent changes the case status from *On Hold* to an *Open* status. The system triggers an SLA Resume event to reschedule service exception workflows.

When a case is not assigned to any agent, notification are sent to provider group on the case. If there is no provider group, a default provider group on the Business Unit Setup page is used for notification.

See Also

[Chapter 23, “Setting Up and Managing Agreements and Warranties,” Configuring the CRM System for Agreement Searches, page 349](#)

[Chapter 23, “Setting Up and Managing Agreements and Warranties,” page 337](#)

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

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

Performing Entitlement Searches

This section discusses how to search for and view agreements and warranties

Pages Used to Perform Entitlement Searches

Page Name	Object Name	Navigation	Usage
Entitlement Match	RF_ENTL_LIST_SEC	<ul style="list-style-type: none"> • From the Case or Service Order page, click the Select Agreement or Warranty link. • For PeopleSoft HelpDesk cases, select the Select Agreement link from the Case page. 	View and then select the entitlements defined on the agreement line or warranty that cover the service on a service order or the support offering on a case. This page appears only if multiple agreement lines or warranties meet the entitlement search criteria.

Searching for and Viewing Warranties and Agreements

Access the Entitlement Match page.

Service Order

Entitlement Match

Select One Line for Entitlements

Customize | Find |

First 1-2 of 2 Last

Select	Name	Type	Renewal Number	Line	Description	Service
<input type="checkbox"/>	COM-AGR-108	Agreement		1 001	COM-AGR-108	PM for A/C
<input checked="" type="checkbox"/>	COM-AGR-108	Agreement		1 002	Repair A/C	Repair A/C

Details

Description Repair A/C

Entitlement Details

Customize | Find |

First 1-4 of 4 Last

Entitlement Name	Description
5 HR-RESP	Five hour guaranteed response
8 HR-REST	Eight hour guaranteed restore
EXT-SL	Extended Service Level
EXTENDED-2	Extended Material Coverage

Product Information

Customize | Find | View All |

First 1 of 1 Last

Product ID	Product Description	Currency	Transaction Price	Purchase Option	Remaining Quantity
SR1001	6600 BTU Room Air (Light Beige)		0.00	Prepaid	4.00

OK

Cancel

Entitlement Match page

The system displays agreements and warranties that meet the entitlement search criteria that is entered for the service order or case. Select the appropriate agreement line or warranty for the case or service order. The system displays the details for the agreement or warranty in the Details group box. You can only select one agreement line or warranty.

Note. If you have not saved the service order, you can perform another entitlement search and select a different warranty or agreement line by clicking the Edit button on the Service Order page.

For cases, agents can attach an agreement, but only the manager can detach it once it saved. When an agent selects an agreement on a case, he or she can still perform another search by clicking the Clear link, and selecting a different agreement before saving the case.

Once the case is saved, only the manager has the privilege to change the agreement. This is controlled through the rule-based security that is defined in the Display Template Component pages for the Clear field. PeopleSoft delivers help desk manager and call center manager as sample data and provides these user IDs with the ability to detach agreements.

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

396

PeopleSoft Proprietary and Confidential

Select One Line for Entitlements

Name and Type Displays the name (agreement or warranty) of the entitlement match. Click the adjacent Agreement or Warranty Transfer button to access the corresponding Agreement or Warranty component.

Renewal Number Displays the renewal number for the agreement. There are no renewals for warranties.

Line Displays the agreement line number that specifies entitlements for the combination of relevant criteria that has been entered on the case or service order.

Note. As described earlier in this chapter, the criteria used for identifying agreement lines may include more than just the customer, site, and product ID.

Description Describes the agreement or warranty as it was entered into the system.

Service Describes the service that is associated with the agreement or warranty. Click the Transfer to Service button to access the Service page and view details of the service as it was entered into the system. The system displays this field for PeopleSoft Integrated FieldService only.

Entitlement Details

Lists the entitlements that define the response time, restore time, service level, or coverage that are contractually owed to the customer as defined by the agreement line or the warranty.

Product Information

Product ID and Product Description Displays the ID and description of the product

Currency Displays the currency of the transaction price. The system does not display this field for PeopleSoft HelpDesk.

Transaction Price Displays the price of the transaction for receiving support or the specified service for the product (repair, preventive maintenance, and so on). The system does not display this field for PeopleSoft HelpDesk.

Purchase Option Displays the method of purchasing the service or support offering for an agreement or agreement service transaction. The system does not display this field for PeopleSoft HelpDesk. Options are:

Flat: The service or support offering is purchased for a flat fee.

Prepaid: A specified number of work units of the service or support offering is purchased in advance. There is no transaction fee for the service or support offering as long as there is remaining quantity for the agreement line.

T&M (time and material): The price of the service or support offering per transaction is based on the labor rate.

Remaining Quantity Displays the amount of unused, prepaid quantity. As long as a positive quantity remains, there is no transaction fee for the service order or support offering. For field service agreements, the prepaid quantity is in units of service orders or hours, and the system decreases this quantity by 1 service

order or the appropriate number of hours specified in the timelog as billable each time a service order that is covered by the agreement line is saved.

If the service order is canceled, the system increases the appropriate number of hours or remaining quantity by 1. For support agreements, workflow processes must be implemented to update remaining quantity.

If the purchase option is *prepaid* and the remaining quantity is zero, the line is viewable but may not be selected on the Entitlement Match page (because all prepaid units are consumed). The system does not display this field for PeopleSoft HelpDesk.

See Also

Chapter 25, “Performing Entitlement Searches for Cases and Service Orders,” Understanding Entitlement Searches, page 391

Chapter 23, “Setting Up and Managing Agreements and Warranties,” page 337

Chapter 23, “Setting Up and Managing Agreements and Warranties,” page 337

PeopleSoft Enterprise Components for CRM 8.9 PeopleBook

PART 8

SmartViews

Chapter 26
Setting Up SmartViews

Chapter 27
Working with SmartViews

CHAPTER 26

Setting Up SmartViews

This chapter provides an overview of SmartViews and discusses how to set them up to work in PeopleSoft CRM.

Understanding SmartViews

This section discusses:

- Overview of the SmartView framework.
- Use of templates.
- Audience and segment groups.
- Metrics and terms.
- Data storage.
- SmartViews security.

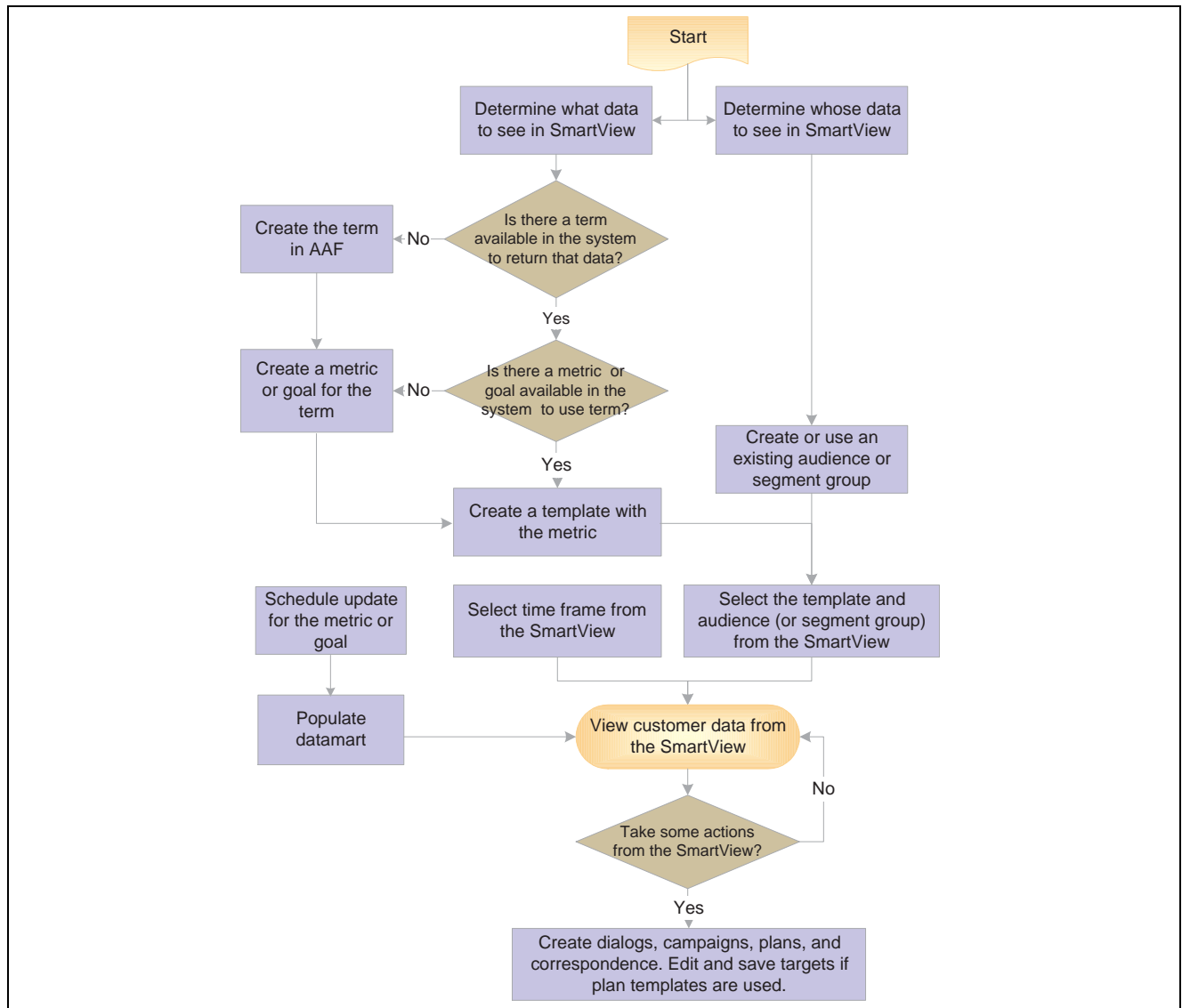
Overview of the SmartView Framework

The SmartView framework enables you to effectively manage key customer groups in a centralized environment where current customer performance information is shared among authorized users. Use this framework to create a configurable, customer-centric view of the enterprise. Through SmartView templates, you can set metrics to view customer performance or measure it in respect to target values. SmartView users can personalize metrics to view meaningful data about customer segments down to the individual account level. They can also perform predefined actions on customers, such as creating a campaign, a plan, or sending correspondence to communicate the SmartView with interested parties across the company.

The customer-centric view of the enterprise is a SmartView. It is constructed using two elements:

- **Templates.** A template dictates what data users are able to see in the SmartView.
- **Customers.** Customers are grouped in the form of audiences or segment groups. The SmartView displays data that pertains to the selected audience or segment group.

This diagram illustrates the high-level process of setting up templates and customers, and using these components in the SmartView.



Process flow for setting up and using SmartView

Use of Templates

A template determines the data you see in the SmartView for each selected audience or segment group (collectively) and customers that belong to it (individually). SmartViews operates in these modes:

- Plan mode - if Strategic Account Planning (SAP) is licensed.
- Metric mode - supported whether or not SAP is licensed.

When creating a template, you reference one or multiple relevant goals or metrics. Each of them is resolved into customer-specific data through a batch process on a regular basis and is displayed on the My SmartViews page at runtime. From there, users can view meaningful information about customer segments or audiences and each of their individual accounts. Goals and metrics are very similar functionally, except that goals support target values as well. Users can edit target values directly on the My SmartViews page and view the variance between target and actual values.

If PeopleSoft Marketing is licensed, SmartViews support the use of audiences and segment groups (segments) in the plan and metric modes; otherwise, only audiences are supported. In this case, you would create audiences from the save search feature (for Lead, Opportunity, Person and Company) because the Manage Audiences component is not available (part of the marketing application).

Plan Mode

Users can leverage planning templates and goals that are defined for SAP and use them in SmartViews. In the plan mode, users can select *segment/audience* or *account* planning templates for the segment group or audience they are viewing. They can modify target values of goals in the SmartView directly and save the updates in respective plans. SmartViews can validate a goal target if the goal can be aggregated. In the case when templates of type *segment/audience* are used, users can validate the aggregated target values of the child level against the total value at the audience or segment level. Note that the target value of the audience or the highest-level segment doesn't always equal to the sum of its child accounts or segments. This happens typically when users manually update target values and overtime the numbers don't match. The system displays a message on screen for each goal that it validates; if the message shows a discrepancy between the total number at the parent level and the sum of target values at its child level, users can modify them accordingly.

Note. No data is displayed in the SmartView if you choose to view a segment group with an account planning template, because account templates apply to accounts only.

In the plan mode, the SmartView displays target values for accounts, audiences or segments, if they belong to plans that are based on the selected template with the same time frame. If values cannot be returned for some reason (for example, there's no plan associated with a particular account, or the time periods don't match), the system provides explanatory messages on the SmartView.

Metric Mode

SmartViews work like a reporting tool in the metric mode. In this mode, you define metrics (measurement of key performance) and associate them in SmartView templates that you create to monitor customer performance. The metric mode is available whether or not SAP is licensed.

Note. Planning templates and goals are not available when SAP is not licensed.

When the SmartView is displayed in metric mode, users can see the actual metric values for each segment or account of the selected segment group or audience. Unlike in plan mode where the status, target values and variance values can be available if so configured, users don't see these information in the metric mode (with the exception of history variance).

See Also

PeopleSoft Enterprise Strategic Account Planning 8.9 PeopleBook, "Creating Segment and Audience Plans"

PeopleSoft Enterprise Strategic Account Planning 8.9 PeopleBook, "Understanding PeopleSoft Strategic Account Planning"

Metrics and Terms

A metric is a measurement of key performance, for example, *lead count*, *number of products owned* or *number of cases*. In the definition of a metric (or goal), you specify a *term* that represents it. The idea of a term comes from the Active Analytics Framework (AAF) ; it's metadata with a user-friendly name and it refers to a piece of information that could either exist physically anywhere in the system or could be derived. It is stored in the data library, which is part of the AAF.

SmartViews run a scheduled batch process to retrieve metric or goal values. What this process does is it resolves terms (referenced in metrics or goals) into data that pertains to each account or segment that is displayed on the SmartView. Users can control which goal or metric and what type of values (for example, actual, history, and target values) to see through the user's personalization.

SmartViews deliver terms for data related to sales, marketing, partners and wealth management; leverage them when you create new goals and metrics. For a list of terms that are delivered by SmartViews, navigate to Enterprise Components, Active Analytics Framework, Data Library, Manage Terms and search with the context name of *Portfolio Segment*. Terms are organized in a tree structure called the subject area. When administrators define metrics and need to specify SmartViews-specific terms, they are available under the SmartViews folder of the Term Selection page.

Take advantage of goals if you license SAP. Goals, if defined to support both planning and SmartViews usage, can be used as metrics in SmartView templates. The difference between using goals in planning templates and SmartView templates is that the setup on target values and assessment in goals doesn't apply to SmartView templates. Therefore, the SmartView doesn't show target data when users select a SmartView template.

See Also

Chapter 26, "Setting Up SmartViews," Defining Metrics, page 409

PeopleSoft Enterprise Strategic Account Planning 8.9 PeopleBook, "Measuring the Attainment of Plan Goals," Establishing Plan Goal Metrics

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

PeopleSoft Enterprise Components for CRM 8.9 PeopleBook

Data Storage

SmartViews cache data to facilitate page rendering when the SmartView is first loaded or updated subsequently. The system provides an application engine (AE) program called RPM_DATAMART that is responsible for retrieving and computing specified goal or metric data and storing it in a predefined datamart. You can define batch processes to run the AE program on a regular basis, for example, nightly, or every few hours. The system retrieves data from the datamart when metric templates are used. When planning templates are used, data comes from SAP directly.

Among the enabled goals or metrics, the AE program updates those that are included in any template that has been selected by users on the Configure My SmartView Profile page to view SmartViews, for the specified time period. Each one of them is updated for every member that belong to the selected audience or segment group as well as the audience or segment groups themselves as a whole. For example, if there's one selected audience on the Configure My SmartView Profile page and it has three accounts associated with it, the AE program returns a total of four metric or goal values.

Users can get realtime goal or metric data at anytime they're reviewing the SmartView, if so configured. This functionality applies to actual data for goals whose calculation method is set to be *automatic*.

See Also

Chapter 26, "Setting Up SmartViews," Setting Up SmartViews, page 407

Audiences and Segment Groups

Audiences and segment groups are the two forms of customer groupings that can be referenced on the SmartView.

Audience

An audience is logical grouping of customers (accounts) that can consist of contacts for companies or partners, and consumers. Customers in an audience may originate from multiple setIDs depending on how you set up the selection criteria. There are a few ways to create audiences; you can use the audience builder in the Manage Audience component of PeopleSoft Marketing, or configurable search pages of components that enable the creation of audiences, such as Lead, Opportunity, Person and Company. In SmartViews, an audience is represented by consumers and companies or partners to which its contacts belongs. Compare to the Manage Audience component that bases its audience count on the number of consumers and contacts, the audience count that is displayed in the SmartView is always equal or fewer because a company or partner often has multiple contacts.

SmartViews display only generated and published audiences. In order for audiences to be used in SmartViews, they have to meet these conditions before the generation process takes place:

- They are in the status of *Approved* or *Committed*.
- They have the Published check box selected.

See *PeopleSoft Enterprise CRM 8.9 Marketing Applications PeopleBook*, “Using Audiences,” Creating and Managing Audiences.

Segments

A segment is a type of audience, a group of customers as defined by selection criteria. Every segment is associated with a segment group, which represents a multi-level hierarchy that contains segments, each of which can have its own child segments. You can define parent-child relationships between segments by referencing the parent segment in the child segment’s definition, and each segment is associated with the segment group of its parent. The structure of the lowest level segments is the same as audience, which consists of customers of the same or different roles.

A segment consists of a group of company or partner contacts, or consumers. In most cases, they will be subcategorized and be available among its child segments (if any). In SmartViews and SAP, the customer counts at non-leaf segments are aggregated and become the total count of leaf segments. Similar to audience, the count that is displayed in segments (in the Segment component) may not match the count that is displayed on the SmartView because the former count is for contacts and the latter for companies and partners. In the Segment component, if a segment has customers at the parent level and they do not belong to any child segment, they are not included in SAP and SmartViews.

Segments and segment groups are available if you license PeopleSoft Marketing.

In order for segments to be displayed in the SmartView as part of their segment group, they need to be generated and published, just like audience. Segments should be in either the *Approved* or *Committed* status and have the Published check box selected before the generation process starts.

See *PeopleSoft Enterprise CRM 8.9 Marketing Applications PeopleBook*, “Using Audiences,” Creating and Managing Audiences.

Plan Creation in Audiences and Segments

Users can create plans for audiences or segments that are already published on the Plans page of the Manage Audience component, if they are given the proper permission to the plan component. The Plans page doesn't appear if the corresponding audience or segment is not published. From the My SmartViews page, users can create plans for the audience or segment group that they are looking at. The plan creation action is available once the system verifies that the sign-in user has the access to the component. Based on the type of the template that is selected, users can choose to create account plans (for *account* templates), or account and audience plans (for *segment/audience* templates). To ensure that users have access to the plans they create, the appropriate dataset rules must be present to grant them the permission. For example, set up a dataset rule that allows the access to plans which are created by the sign-on user.

See [Chapter 27, "Working with SmartViews," Working with SmartViews, page 417.](#)

SmartViews Security

Data access in the SmartView is restricted to authorized users as it often contains sensitive information. When the SmartView is in the metric mode, users can see customer data for an audience or segment (within the segment group) only if they are a team member of the corresponding audience or segment. If the SmartView is in plan mode, they need to be a plan team member of the selected template to see the data. The SmartView displays a padlock icon next to the audience or segment that users don't have access to, and that means it cannot be viewed.

Security for Historical Data

You can set up SmartViews to display data from past time periods and make comparison with current data. Users personalize how they want historical customer data to be displayed by selecting the frequency (for example, annually and quarterly) and how many times the data for the selected frequency to retrieve (for example, two previous quarters). Historical data is only available for time frames that have been defined in the system. To view past data of an audience or segment, users need to be a current team member of the audience or segment when in metric mode. If users are viewing the SmartView using a plan template (that is, in plan mode), users need to be a current team member of that plan *and* the audience or segment that are on display.

Through personalization, users can select to view target and actual values for past periods as historical data, and historical variance that is calculated:

Historical variance = (current actual value - previous actual value)/previous actual value

See [Chapter 27, "Working with SmartViews," Configuring Display Options for Historical Data, page 424.](#)

Security for Audience and Segment Selection

In order to select audience and segments for the SmartView, users must either be a team member, or share a role that the audience or segment has specified as a team role.

See [Chapter 27, "Working with SmartViews," Viewing the SmartView, page 418.](#)

Security for Actions

SmartViews determine the list of available actions on the SmartView based on the permission that is given to the sign-on user and the availability of the components that perform the actions. For example, if a user doesn't have permission to create a marketing dialog, this action is not available when the user accesses the My SmartViews page even if PeopleSoft Marketing is licensed.

Users cannot create account, audience or segment plans if a SmartView template is selected to view the SmartView.

See [Chapter 27, “Working with SmartViews,” Viewing the SmartView, page 418.](#)

Setting Up SmartViews

This section discusses how to:

- Define system data.
- Define metrics.
- Specify time frames for metric updates.
- Define SmartView templates.
- Generate audiences.
- Schedule process for caching metric data.
- View scheduled update results.

Pages Used to Set Up SmartViews

Page Name	Object Name	Navigation	Usage
SmartViews System Data	RPM_SYSTEM_DATA	Set Up CRM, Product Related, SmartViews, System Data, SmartViews System Data	Specify the currency code, display option and actions that users can perform on SmartViews.
Metric	RSP_GOAL_TBL	Set Up CRM, Product Related, SmartViews, Define Metrics, Metric	Define metrics that are used to measure SmartView performance. They are identical to goals in SAP and can be referenced in SmartView templates if you don't license SAP. Both metrics and goals can be aggregated if specified; while the system uses the aggregated goal value to perform target value validation, the aggregated metric value is currently not used in any processing.
Update	RPM_GOAL_UPDATE	Set Up CRM, Product Related, SmartViews, Define Metrics, Update	Specify the time frames by which the metric value needs to be calculated and updated in datamart.
SmartView Template	RSP_PLANNING	Set Up CRM, Product Related, SmartViews, SmartView Templates, SmartView Template	Define templates for SmartViews. Use these templates to view the SmartView if you do not use SAP plan templates.
Configure Search Save	RB_FILTER_SAVE	Click the Save Search Criteria link on the search page of any component that supports the generation of audiences in the configurable search page.	Create an audience in the configurable search page.
Schedule Updates	RPM_TL_RUN	Set Up CRM, Product Related, SmartViews, Schedule Updates, Schedule Updates	Schedule to run an application engine process that updates metric data.
View Updates Result	RPM_UPDATE_SRCH	Set Up CRM, Product Related, SmartViews, View Updates Result, View Updates Result	View status information on goals and metrics after the update process has run.

Defining System Data

Access the SmartViews System Data page.

SmartViews System Data

*Cache Data in Currency Code

USD

US Dollar

*Maximum number to display

300

Action Lists

CustomizeFindView All

First1-5 of 5Last

*Action Code	*Action Name	Application Class Path	Long Description
CAMP	Create Campaign	RPM_DASHBOARD:ACTIVITIES:Campaign	Create Audience/Segment Campaign
CORR	Create Correspo	RPM_DASHBOARD:ACTIVITIES:Corresponc	Create Correspondence for individual
DIAL	Create Dialog	RPM_DASHBOARD:ACTIVITIES:Dialog	Create Audience/Segment Dialog
PLA2	Create Plan	RPM_DASHBOARD:ACTIVITIES:Plan	Create Audience/Segment Plan
PLAN	Create Account F	RPM_DASHBOARD:ACTIVITIES:Plan	Create Account Plan

Add New Action

SmartViews System Data page

Note. A user with the *SmartViews Administrator* role should complete setup on this page before data caching for SmartViews begins. Consider that a one-time setup that you hardly change afterwards. If you make changes on this page, it requires that you clear all the cached data for the new setup to take effect.

- Cache Data in Currency Code

Select the default currency that is used for computing goal or metric data and populating it in datamart.
- Maximum number to display

Enter the maximum number of customers to display for an audience in the My SmartViews page. To optimize performance, the suggested value is 300. In addition, users can set up the filter to refine the list customers that return.

Action Lists

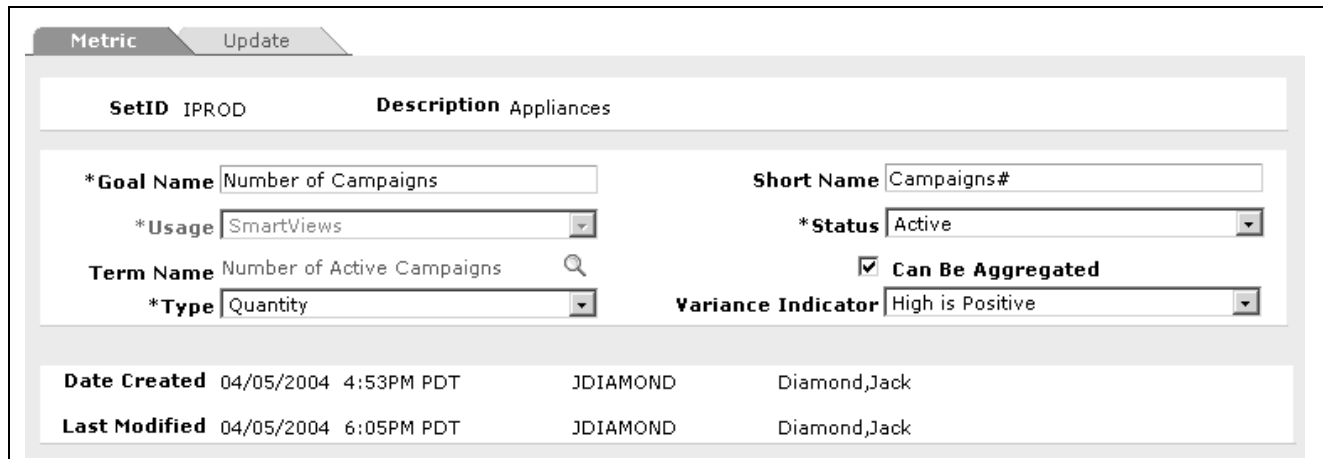
This grid contains a list of system delivered actions that you can invoke for the SmartView. Engage consulting effort if you wish to add custom action; SmartViews provides the infrastructure where you can reference the custom application class code that is written to execute respective actions.

See Also

Chapter 27, “Working with SmartViews,” Working with SmartViews, page 417

Defining Metrics

Access the Metric page.



SetID	IPROD	Description	Appliances
<p>*Goal Name Number of Campaigns Short Name Campaigns#</p> <p>*Usage SmartViews *Status Active</p> <p>Term Name Number of Active Campaigns Can Be Aggregated <input checked="" type="checkbox"/></p> <p>*Type Quantity Variance Indicator High is Positive</p>			
Date Created	04/05/2004 4:53PM PDT	JDIAMOND	Diamond,Jack
Last Modified	04/05/2004 6:05PM PDT	JDIAMOND	Diamond,Jack

Metric page

SmartViews supports the use of goals, which are defined to be used in SAP and SmartViews, in SmartView templates. Define metrics if you do not license SAP. Metrics are applicable to SmartView templates only.

Name and Short Name

Enter the standard (required) and short names of the metric.

Give a descriptive short name and limit its length to 10 characters or fewer. SmartViews displays metrics' short names as part of the column headings to identify metrics. If the short name is not available, the system takes the first 10 characters of the standard name to be the short name.

Usage

Displays the application by which the metric is used. The value is always *SmartViews* and it's not editable.

If you define a goal, the usage can be *SmartViews*, *Planning* (strategic account planning), or *Both*.

Term

Specify an AAF term that is used to retrieve data for the metric for measuring SmartView performance.

Type

Select the type of data that returns. Choose from *Amount*, *Other*, *Percent* and *Quantity*.

Variance Indicator

Select to indicate whether a high attainment is positive or not. Options are: *High is Positive* and *Low is Positive*. For example, if the term is number of leads and it's good that the returned value is higher than the target value, select *High is Positive* for this term.

See Also

PeopleSoft Enterprise Strategic Account Planning 8.9 PeopleBook, "Measuring the Attainment of Plan Goals," Establishing Plan Goal Metrics

Specifying Time Frames for Metric Updates

Access the Update page.

Metric **Update**

SetID IPROD **Description** Appliances

Name Increase Leads **Short Name** Incr leads

☐ **Can Be Used In Real Time**

Timeframe To Be Updated [Find](#) | [View All](#) First 1 of 1 Last

	Enable	*Time Frame	Begin Date	End Date	*Date to Begin Calculation	*Date to End Calculation
1	<input checked="" type="checkbox"/>	2004 BY MONTH-Q1-200	01/01/2004	03/31/2004	01/01/2004	03/31/2004

[Add New Timeframe](#)

Update page

Can Be Used In Real Time Select this check box if you want the metric to automatically update when you click the Fetch Real Time Data button on the My SmartViews page. When you click this button, the system updates the actual values for all the metrics and goals, which have this check box selected, that appear on the page.

Fetching realtime data for terms can cause performance hit to the system, especially KPI (key performance indicator) terms that reference data from external sources. Exercise caution when enabling this option for terms.

Timeframe To Be Updated

This grid lists the time periods within which the metric data gets updated. Select from the predefined active time periods that are established in the Time Frames component with usage set to either *all* or *planning & SmartView*. Selecting a time frame automatically populates the Begin Date and End Date fields. Enter a date range using the Date to Begin Calculation and Date to End Calculation fields for the system to determine if a schedule update needs to occur. When the time comes, the system verifies that the start time falls this date range; if it is, the update for corresponding time frame takes place.

If you select the metric to be updated through the AE program, the program retrieves data for the metric within the selected time frames at a frequency defined in each one of them.

Note. When defining a time frame period for using in SmartViews, make sure to enter a 10-character short description, which is used to specify the time frame on the column heading for each goal or metric.

See Also

[Chapter 14, “Defining Holiday Schedules,” Defining Holiday Schedules, Time Frames, and Sales Quota Rollups, page 197](#)

[Chapter 26, “Setting Up SmartViews,” Setting Up SmartViews, page 407](#)

Defining SmartView Templates

Access the SmartView Template page.

SmartView Template

Save

Refresh

Add

Return

Notify

Clone

Next In List

Previous In List

Personalize

Template Name

Customer Profile

Status

Active

SetID

IPROD

Start Date

01/01/2004

End Date

12/31/2004

Header Details

Tasks

Notes

Template Details

Name

Customer Profile

*Status

Active

Description

Customer Profile

Start Time Frame

2004Fiscal Year

End Time Frame

2004Fiscal Year

Start Date

01/01/2004

End Date

12/31/2004

Identify Metrics

Customize

Find

View All

First

1-4 of 4

Last

Details

Variance Indicator

SmartView Template page (1 of 2)

Template Editors

Customize

Find

View All

First

1-3 of 3

Last

Owner	Name	Phone	Title
<input type="checkbox"/>	Spencer Underwood		Support Agent
<input type="checkbox"/>	Burt Lee		Sales Manager
<input checked="" type="checkbox"/>	Jack Diamond	408/555-5000	Marketing Manager

First Name

Last Name

Add New Editor

Audit History

Created	04/05/2004 3:41PM PDT	By	JDIAMOND	Diamond,Jack
Modified	04/05/2004 5:04PM PDT	By	JDIAMOND	Diamond,Jack

SmartView Template page (2 of 2)

The interface of the SmartView Template component is almost identical to the Planning Template component. Several differences between the two components include:

- Some page fields that are specific to planning templates are not displayed in the Template Details group box, for example, Usage, Plan Type, Frequency, Currency and Lock Down Changes to Plan Targets.
- The Objectives and the Plan Team Members group boxes do not appear.

See *PeopleSoft Enterprise Strategic Account Planning 8.9 PeopleBook*, “Setting Up Planning Templates”.

Generating Audiences

This section discusses how to generate audiences and segments through the saved search method. For more information on other ways to generate audiences and segments and their functionality, please refer to the documentation on the marketing application.

Access the search page of the Lead, Opportunity, Person, or Company component and click the Save Search Criteria link after performing a search you wish to save.

Configurable Search Save page

In addition to saving the criteria that you used in the search for future usage, you can select to save the search result as an audience. Make sure that the Publish check box is selected so that the audience can be used in SmartViews after it is generated.

Please refer to the marketing application documentation for more information on creating segments and other ways to generate audiences.

See Also

PeopleSoft Enterprise CRM 8.9 Marketing Applications PeopleBook, “Using Audiences,” Creating and Managing Audiences

Scheduling Processes for Caching SmartView Data

Access the Schedule Updates page.

Schedule Updates

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

Description:

Goals/Metrics
[Customize](#) | [Find](#) | [View All](#) |
First 1-4 of 4 Last

Enable	*SetID	*Goal ID	Goal/Metric Name	
<input checked="" type="checkbox"/>	IPROD	1012	Partner Quotes	
<input checked="" type="checkbox"/>	IPROD	1013	Partner Revenue	
<input checked="" type="checkbox"/>	IPROD	1014	Partner Average Order	
<input checked="" type="checkbox"/>	IPROD	1015	Partner Oppy Revenue	

Schedule Updates page

Note. Do not put spaces in the run control ID.

In the Goals/Metrics grid, enter the goals and metrics to be updated. When you click the Run button on this page, you are transferred to the Process Scheduler Request (PRCSRQSTD LG) page. The system invokes the application engine program, RPM_DATAMART, which retrieves and computes new values for selected goals and metrics as scheduled and populates them in datamart.

PeopleSoft recommends that you categorize goals and metrics by frequency (yearly, quarterly, monthly, and so on) and create run controls for each applicable frequency. You can then specify the recurring time interval in each run control that is appropriate to its goals and metrics. You can define new recurrence definitions if necessary.

Access to this page is granted to users with the role of *SmartView Administrator*.

See Also

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Process Scheduler

Viewing Scheduled Update Results

Access the View Updates Result page.

View Updates Result						
SetID = Appliances						
View Updates Result						
SetID	Goal/Metric Name	Status	Run Control ID	Begin Date/Time	End Date/Time	Message Text
IPROD	Customer Meetings	Success	Metrics_Update	04/19/04 5:56:42PM	04/19/04 5:56:43PM	Cache Update Successful
IPROD	Customer Meetings	Success	Metrics_Update	04/20/04 4:30:50PM	04/20/04 4:30:54PM	Cache Update Successful
IPROD	Customer Meetings	Success	Metrics_Update	04/20/04 5:00:17PM	04/20/04 5:00:18PM	Cache Update Successful
IPROD	Number of High Cases	Success	Metrics_Update	04/12/04 3:03:35PM	04/12/04 3:03:35PM	Cache Update Successful
IPROD	Oppy Revenue (days)	Success	Metrics_Update	04/19/04 5:56:43PM	04/19/04 5:56:43PM	Cache Update Successful
IPROD	Oppy Revenue (days)	Success	Metrics_Update	04/20/04 4:30:55PM	04/20/04 4:30:55PM	Cache Update Successful
IPROD	Oppy Revenue (days)	Success	Metrics_Update	04/20/04 5:00:18PM	04/20/04 5:00:18PM	Cache Update Successful
IPROD	New Leads	Success	Metrics_Update	04/19/04 5:56:43PM	04/19/04 5:56:43PM	Cache Update Successful
IPROD	New Leads	Success	Metrics_Update	04/20/04 4:30:55PM	04/20/04 4:30:55PM	Cache Update Successful
IPROD	New Leads	Success	Metrics_Update	04/20/04 5:00:18PM	04/20/04 5:00:18PM	Cache Update Successful
Search						

View Updates Result page

This page displays update status of each goal or metric after the process has run—success or failure. If there are no goals defined to be updated, no status is displayed.

The View Updates Result grid grows over time and in most cases you may not need to view schedule updates that are more than a week ago. You can set up the system to empty the PeopleSoft Process Scheduler tables and file system periodically on the Purge Settings page. For more information on system purge options, please refer to the documentation on PeopleSoft Process Scheduler.

See Also

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Process Scheduler

CHAPTER 27

Working with SmartViews

This chapter discusses how to work with the SmartView.

Working with SmartViews

This section discusses how to:

- View the SmartView.
- Configure SmartViews.
- Personalize templates for display.
- Configure display options for historical data.

Pages Used to Work with SmartViews

Page Name	Object Name	Navigation	Usage
My SmartViews	RPM_DASHBOARD	My SmartViews, My SmartViews	View the SmartView.
Create Campaign Page	RPM_CAMPAIGN	Select <i>Create Campaign</i> from the Action field and click the Go button.	Create campaigns for selected accounts or segments.
Create Correspondence Page	RPM_CORRESPONDENCE	Select <i>Create Correspondence</i> from the Action field and click the Go button.	Create correspondence requests for selected accounts or segments.
Create Dialog Page	RPM_DIALOG	Select <i>Create Dialog</i> from the Action field and click the Go button.	Create advisor dialogs for selected accounts or segments.
Configure My SmartView Profile	RPM_SETUP	Click the Configure toolbar button on the My SmartViews page.	Select audience or segment groups that the SmartView is built for and templates that are used to look at the SmartView.
Personalize Template	RPM_PERSONALIZE	Click the Personalize toolbar button on the My SmartViews page.	Select which goals or metrics and their data types to display on the SmartView.
Set Template Metric History	RPM_HISTORY	Click the Edit History link on the Personalize Template page.	Configure options to display historical data.
Create Plan	RPM_PLANS	Select <i>Create Account Plan</i> from the Action field and click the Go button.	Create account plans for selected accounts.
Audience Plan	RSP_PLANNING	Select <i>Create Audience Plan</i> from the Action field and click the Go button.	Create audience plans for selected audiences.

Viewing the SmartView

Access the My SmartViews page.

My SmartViews

Save Target | Email | Apply Filter | Configure | Personalize

Display Selections

*SmartView: Aud:Platinum Customers | *Template: A&S:Annual Appl Sales Plan | *Time Frame: 2004 Fiscal Year | *Currency: Schilling | Update Display

Jan 1, 2004 - Dec 31, 2004

SmartView	2004 Fisca CustMtg Status	2004 Fisca CustMtg Target	2004 Fisca CustMtg Actual	2004 Fisca CustMtg Variance	2004 Fisca OppyRevDay Status	2004 Fisca OppyRevDay Target
<input checked="" type="checkbox"/> Platinum Customers(5)		1.00				317,466.8
<input type="checkbox"/> Cady Montgomery		1.00	0.00	-100.00%		317,466.84
<input type="checkbox"/> Grandma Kitchens Foods Inc.		1.00				317,466.84
<input type="checkbox"/> Health Conscious.com						
<input type="checkbox"/> Lakeview Community College						
<input type="checkbox"/> MMA Property Management Group						

☐ Select All / Clear All

Action: Create Correspondence | Go | Fetch Real-Time Data | Validate Target | Download

Viewing an audience in the My SmartViews page

My SmartViews

Save Target | Email | Configure | Personalize

Display Selections

*SmartView: SG:Customer Value | *Template: A&S:Annual Appl Sales Plan | *Time Frame: 2004 Fiscal Year | *Currency: US Dollar | Update Display

Jan 1, 2004 - Dec 31, 2004

SmartView	2004 Fisca CustMtg Status	2004 Fisca CustMtg Target	2004 Fisca CustMtg Actual	2004 Fisca CustMtg Variance	2004 Fisca OppyRevDay Status	2004 Fisca OppyRevDay Target
<input type="checkbox"/> Customer Value (16)						
<input type="checkbox"/> All Value Customers (16)		1.00	0.00	-100.00%		25,000.00
<input checked="" type="checkbox"/> High Value Customers (5)		1.00				
<input type="checkbox"/> Low Value Customers (11)						25,000.00

☐ Select All / Clear All

Action: Create Campaign | Go | Fetch Real-Time Data | Validate Target | Download

Viewing a segment group in the My SmartViews page

The view of this page pertains to the sign-in user. When users access this page for the first time, the system displays the Configure My SmartView Profile page where they select at least one audience or segment group and one template to build their own SmartViews. On the My SmartViews page, users review how each member of the selected audience or segment group performs based on the retrieved data that is defined from the selected template. They can personalize the SmartView by choosing which goal or metric data columns to appear and how historical data is handled. Users can also make changes to target values directly in the SmartView and save changes to the corresponding plan, if a plan template is used. If necessary, they can perform actions on selected audience or segment group members.

When users click the segment or audience link to transfer to the actual segment and audience, the customer counts that are displayed in parenthesis on the My SmartViews page can be different from what is shown in the component. It is because the number on the My SmartViews page denotes the number of companies or partners in that audience or segment, whereas in the actual component, the number is translated to the number of contacts that are associated with the companies or partners.

The SmartView shows a maximum of eight terms. Every historical data for a term is also treated as a term. SmartViews provide the personalization option for users to refine the data they wish to see if there are more than eight terms.

Time Frame

Select a time period within which the SmartView is displayed. The selected template dictates the available time frames in this drop-down list box. When you select a different template, the values in the Time Frame field may change accordingly.

For planning templates, the time frame selection always include the current period specified in the template, the one prior and the one after the current period. For SmartView templates, the time frame selection consists of the applicable time frame period type in the system in regards to the current time you're looking at the SmartView. For example, if you access your SmartView in January 1, 2004, the applicable time frame may include *2004 January*, *2004 first quarter*, *2004 fiscal year* and so on, depending on the time frame period types that are defined. For each one of these time periods, the selection also includes the one that's prior and the one that's after. In other words, for the *2004 January* time period, additional time frames *2003 December* and *2004 February* become available in the Time Frame drop-down field.

Update Display

Click to refresh the My SmartViews page. Make sure to click this button after making changes to the SmartView, Template, Time Frame or Currency field.



Indicates the audience list. Clicking the adjacent audience link transfers you to the actual audience in the Manage Audiences component in a new browser window.



Indicates consumers. Clicking the adjacent consumer link transfers you to the actual consumer in the Consumer component in a new browser window.



Indicates partners. Clicking the adjacent partner link transfers you to the actual partner in the Partner component in a new browser window.



Indicates companies. The lowest level of a segment group or audience is always companies. Clicking the adjacent company link transfers you to the actual company in the Company component in a new browser window.



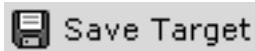
Indicates the segment group.



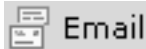
and

Indicates segments. Clicking the adjacent segment link transfers you to the actual segment in the Segment component in a new browser window.

If you're in metric mode, click the second folder button of a segment to view a list of customers that belong to the segment. The presentation is identical to viewing an audience. Click the third folder button to return to the segment group view. This drill down capability is not applicable to the plan mode.



Click to save changes you make on target values to the corresponding plan. This button doesn't apply if the SmartView is in the metric mode (meaning a SmartView template is in use).



Click to access the Email SmartView page where you can send email to interested parties with the SmartView as a .csv attachment. Users need to have an email address defined in the CRM system to send emails on this page. The SmartView is sent to the users's email address that is specified for the *business* type on the Worker page.



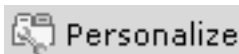
Click to access the Filter SmartView page to filter customers that you see on the SmartView. By default, the SmartView shows 300 rows of data (recommended). Specify the row display setting on the SmartViews System Data page.

If you want to change the filter criteria, click the Change Filter button to access the Filter SmartView page and modify the values. Click the Remove Filter button to delete the filter. These two buttons appear only when you have applied filter to the audience or segment group on your SmartView.

Note. The Apply Filter button does not appear in plan mode.



Click to access the Configure My SmartViews Profile page to select audience (and segment groups) and templates to view the SmartView.



Click to access the Personalize Template page to select which goals or metrics and their data types to display on the SmartView.



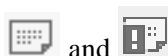
Click to update the actual data immediately for goals and metrics that have enabled for real time update. The update applies to data in the time period you're currently viewing.



Click to validate the aggregated target values of accounts (or child segments) with the total value at the audience (or segment) level and show the result as popup window messages. The system disables this button when a SmartView or an account template is in use, or when a filter is applied. This functionality is not applicable to goals or metrics that cannot be aggregated as defined.



Click to export the SmartView grid to a spreadsheet in a new browser window.



and

Click to access the Summary page to view information pertaining to the corresponding customer. Both icons provide information on the data fetching result and list out existing plans that the corresponding customer may have. The alert icon (the one with the exclamation point) is used typically when the system is unable to get certain data and someone in the team may need to review the issue. If you want to take a quick look at the data fetching result and don't want to click the icon every single time, put the cursor over the links; the hover text has the information on the result.

Action

Select an action to perform for selected customers. System-delivered options include *Plan*, *Campaign*, *Dialog* and *Correspondence*. You can create custom actions by writing application class code and referencing it in the SmartViews System Data page.

You can select to add an audience plan or account plan if you view an audience using a planning template (for audience and segment) on the My SmartViews page. Create one type of plan for the selected customers or accounts at a time.

If you create a campaign for an activity type that uses any of the listed marketing channels, you need to enter the corresponding required values on the Activities page of the Marketing Programs component to save the campaign:

- Order Capture channel: list, offer and script name are required.
- Facsimile channel: list and package are required.
- Telemarketing channel: content, offer list, script name, and integration are required.
- Mail channel: list and package are required.
- Sales Agents channel: list is required.
- Advisor channel: advisor ID is required.

Configuring SmartViews

Access the Configure My SmartView Profile page.


Configure My SmartViews Profile

User ID rlao ☐ **Highlight Real-Time Data**

SmartView
Customize | Find | 
◀ 1 of 1 ▶ Last

Default	Name	Type	*Currency Code	Total Count	
<input type="checkbox"/>	Western Region	Audience	USD 	5	

Template
Customize | Find | 
◀ 1-4 of 4 ▶ Last

Default	Name	Status	Usage	Frequency	
<input type="checkbox"/>	Targeted Accounts Sales Plan	Active	Account	Annual	
<input type="checkbox"/>	Targeted Accounts Sales Plan	Active	Account	Annual	
<input type="checkbox"/>	2004 Sales Drive	Active	SmartViews	Annual	
<input type="checkbox"/>	Annual Appl Sales Plan	Active	Segment	Annual	

Configure My SmartView Profile page

Highlight Real-time Data

Select to let the system highlight the new and changed data in yellow after the fetch realtime data process is complete.

SmartView

This grid lists the audience and segment groups that become available for selection in the SmartView drop-down list box on the My SmartViews page. Select an entry as a default value that always show up in the SmartView field. To add a new audience or segment group, click the corresponding button to add a new row. If you don't have PeopleSoft Marketing in the system, the Add Segment Group button does not appear.

Note. If you access this page and change the default SmartView while you're in the My SmartViews page, the change takes effect the next time you access the My SmartViews page, for example, when you click the My SmartViews link on the left navigation menu.

Currency Code Select the default currency to use when this audience or segment group is selected.

Total Count Specify the number of customers in this audience or segment group.

Template

This grid lists the templates that can become available in the Template drop-down list box on the My SmartViews page. While you can select templates of active or draft statuses, only the active ones are available for selection on the My SmartViews page. Specify an active template to be the default one to use whenever you access the page.

Note. If you access this page and change the default template while you're in the My SmartViews page, the change takes effect the next time you access the My SmartViews page, for example, when you click the My SmartViews link on the left navigation menu.

Personalizing Templates for Display

Access the Personalize Template page.

Personalize Template

User ID VP1

Template Goals/Metrics									
Enable	Order	Name	Short Name	Status	Target	Actual	Variance	History	Edit History
<input checked="" type="checkbox"/>	10	Increase Sales Leads	Lead Count	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit History
<input type="checkbox"/>	20	Drive Product Sales	ProdSales	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit History
<input checked="" type="checkbox"/>	30	Increase Opportunity Revenue	OppyRev	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Edit History

OK Cancel

Personalize Template page

The Status, Target, and Variance check boxes are disabled if you select a SmartView template.

Enable Select to show the corresponding goal or metric on the My SmartViews page.

Status, Target, Actual, Variance and History Select the corresponding check box to display data about the goal or metric on the SmartView:

- **Status** - displays the assessment icon of the goal for each customer. It applies to planning templates only.
- **Target** - displays the current target value of the goal for each customer. It applies to planning templates only.

If the goal is marked as prorated in SAP, a Prorated-T (prorated target) column is shown on the My SmartViews page if this Target check box is selected.

- **Actual** - displays the current actual value of the goal or metric for each customer.

Actual data comes from SAP when the SmartView is in plan mode. In metric mode, SmartView data is retrieved from the datamart. Because of the difference in the way data is returned, discrepancies may occur if the times when the data was retrieved from both mechanism were not the same.

- **Variance** - displays the current variance value of the goal for each customer. It applies to planning templates only. The variance value is calculated as:

$$\text{Variance} = (\text{actual value} - \text{target value}) / \text{target value}$$

- **History** - displays historical information of the goal or metric for each customer.

Edit History

Click to access the Set Template Metric History page and specify the criteria for displaying historical data on the SmartView.

Configuring Display Options for Historical Data

Access the Set Template Metric History page.

Set Template Metric History

User ID VP1

Template Name Yearly Sales Plan

Goal Name Increase Sales Leads

History First 1 - 7 of 7 Last

	Order	Period Type	Number of Past Periods	Actual	Target	Variance	Historical Variance
1	10	Annual	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
2	20	Monthly	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
3	30	Same Month of Past Years	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
4	40	Quarterly	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
5	50	Same Quarter of Past Years	2	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
6	60	Semi-Annual	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
7	70	Same Half Year of Past Years	0	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

OK Cancel

Set Template Metric History page

Period Type and Number of Past Periods

Displays the time periods for which historical data can be displayed. The available periods are determined by what have been defined in the system. For example, if the *monthly* period type exists in the system, you can see two period types on this page that pertain to it: *monthly* and *same month of past years*. If you enter 2 as the number of past periods for the *monthly* period type, that means the system returns two columns of past data for the previous two months, based from the current date. If you enter 2 as the number of past periods for the *same month of past years* period type, that means the system returns two columns of past data for the same month as the current date in the past two years. The relevant time frame periods in the past must be defined for the past data to be displayed.

Target

Select to display the target value of the past periods (not available if the SmartView is in the metric mode). Past target values are not editable. The Prorated-T column (reflecting current data) does not apply to historical target data.

Actual

Select to display the actual value of the past periods.

Variance

Select to display the current variance value (not available if the SmartView is in the metric mode).

History Variance

Select to display the history variance of the current and the past data. History variance applies to time period of the same type.

See Also

[Chapter 14, “Defining Holiday Schedules,” Defining Holiday Schedules, Time Frames, and Sales Quota Rollups, page 197](#)

APPENDIX A

Managing PeopleSoft Customer Relationship Management Integration Points

This chapter provides an overview of PeopleSoft Customer Relationship Management (PeopleSoft CRM) integration points and discusses how to:

- Process PeopleSoft Business Interlinks transactions.
- Process inbound application message transactions.
- Process inbound transactions.
- Process outbound application message transactions.
- Set up chunking.
- Publish outbound messages.

Understanding PeopleSoft CRM Integration Points

PeopleSoft CRM integration points enable you to:

- Send or publish a message to a third-party system.
- Accept or subscribe to messages from third-party systems.
- Send a synchronous request and reply transaction to a third-party system for processing.

Processing PeopleSoft Business Interlinks Transactions

Sometimes PeopleSoft CRM needs to call an external system vendor's application to request information. This information must be provided in a real-time, synchronous mode. The PeopleSoft application waits for the answer from the other application in real time, before the PeopleSoft application can continue processing.

These transactions use PeopleSoft Business Interlinks definitions to specify the data passed to this external system as well as to define the output to be received from the external system. The data that is passed from the interlink object is interpreted by an interlink plug-in, which then contacts the external system, passes the data in the correct form, retrieves the data, and then passes it, in the correct form, back to the interlink object:

EIP	Object Name	PeopleSoft CRM Product	Reference
Import Data	CR_IMPORT_DATA	General Options/Common	See Chapter 3, “ Setting Up General Options ,” page 17.
Open Model Template	CR_OPEN_MODEL_TEMPLATE	General Options/Common	See Chapter 3, “ Setting Up General Options ,” page 17.
Recalculate	CR_RECALCULATE	General Options/Common	See Chapter 3, “ Setting Up General Options ,” page 17.
Sales Order	PSGETID	General Options/Common	See Chapter 3, “ Setting Up General Options ,” page 17.
Freight Calculations CRM	RATE_REQUEST	PeopleSoft Enterprise Order Capture	See <i>PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook</i> , “Setting Up PeopleSoft Order Capture,” Setting Up Freight Integration.
Freight Calculations CRM	RATE_REQUEST_XFRM	PeopleSoft Enterprise Order Capture	See <i>PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook</i> , “Setting Up PeopleSoft Order Capture,” Setting Up Freight Integration.
Freight Calculations CRM	RATE_RESPONSE	PeopleSoft Enterprise Order Capture	See <i>PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook</i> , “Setting Up PeopleSoft Order Capture,” Setting Up Freight Integration.
Purchase Order & InterUnit Transfer Information	RF_GETPOIUT	PeopleSoft Enterprise Integrated Field Service	See <i>PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook</i> , “PeopleSoft Product Integration”.

EIP	Object Name	PeopleSoft CRM Product	Reference
Item Balance	RF_IN_ITEM_BALANCES	PeopleSoft Enterprise Integrated Field Service	See <i>PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook</i> , “PeopleSoft Product Integration”.
Tax Calculations	TAXWARE_CALCTAX	Enterprise Strategy Group	See <i>PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook</i> , “Setting Up PeopleSoft Order Capture,” Defining Tax Installation Options.
Tax Calculations	VERTEX_CALCTAX	Enterprise Strategy Group	See <i>PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook</i> , “Setting Up PeopleSoft Order Capture,” Defining Tax Installation Options.
VAT Calculations CRM	VAT_CALC	PeopleSoft Enterprise Order Capture	See <i>PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook</i> , “Setting Up PeopleSoft Order Capture,” Defining Tax Installation Options.

See Also

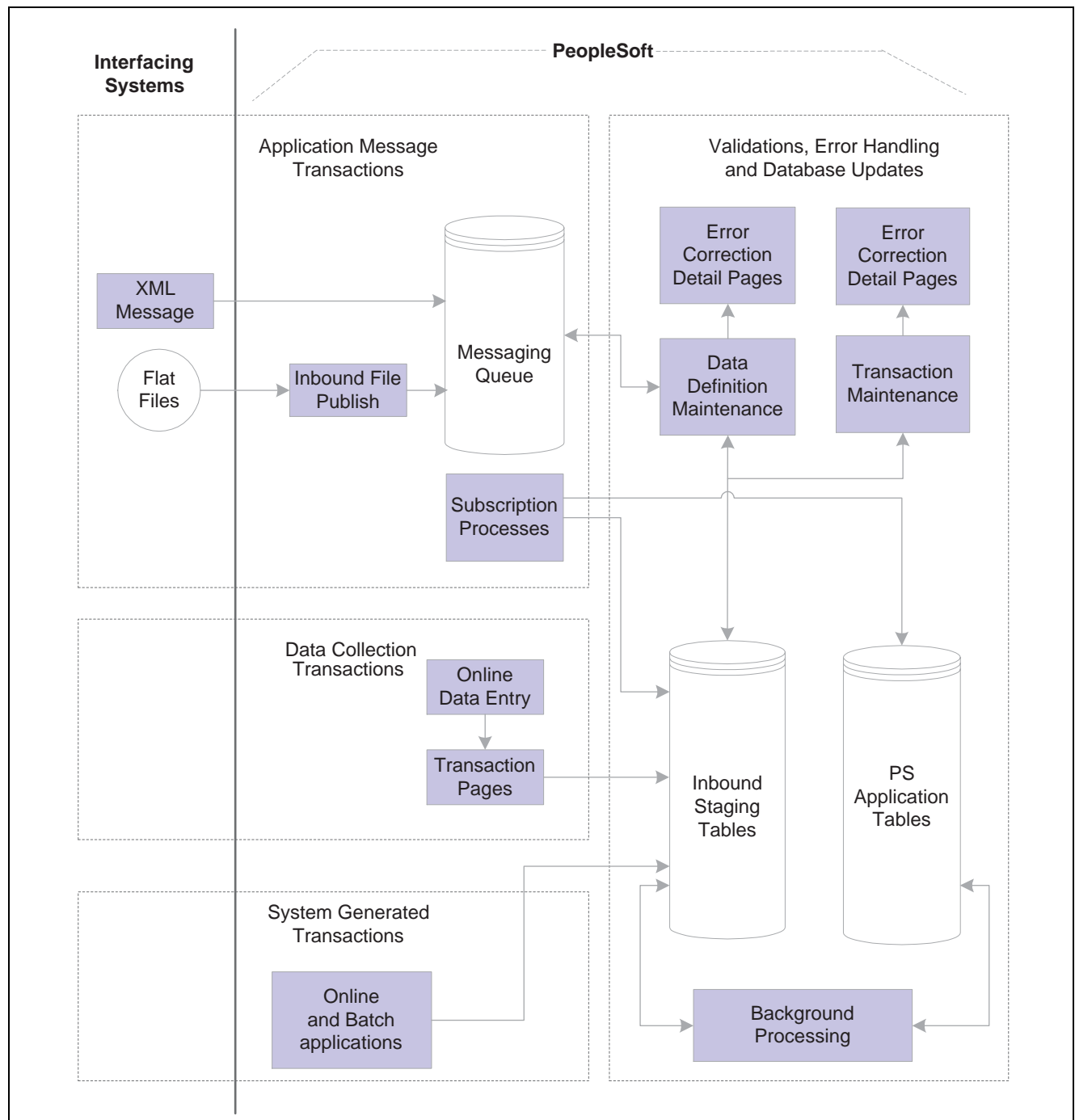
Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Business Interlinks

Processing Inbound Application Message Transactions

Third-party systems can send PeopleSoft applications information using a number of integration points established throughout the system. Depending on the application, various technologies provide multiple options for interacting with the PeopleSoft system. Each option provides audit trails, validations, and error handling to insure that data integrity is maintained within the PeopleSoft database.

Understanding the Inbound Transaction Architecture

Depending on the requirements of the interacting system and the integration point within the PeopleSoft system, various technologies are used to receive transactions into the PeopleSoft system:



Inbound transaction flow

Application Message Based Transaction

The PeopleSoft Application Messaging functionality provides a method for asynchronous communications between external systems and PeopleSoft applications using industry standard XML-formatted messages. XML messages are automatically loaded into the PeopleSoft system by using subscription processes that are unique to each message type. You can view all transactions in the transaction log and access the detail pages that enable you to correct transaction errors. Most subscription processes load message information into staging tables where background programs validate and process individual transactions within the message.

The Inbound File Publish utility, which utilizes the File Layout Object tool, may also be used to automatically convert flat file input to XML-based application messages. Examples are provided showing how to use this utility, as PeopleSoft CRM electronic data interchange (EDI) transactions have been set up to take advantage of this feature.

Electronic Data Collection Transaction Pages

PeopleSoft CRM includes transaction pages for many of the inbound transactions. The transaction pages are designed for quick data entry. There are minimal edits, and no application database updates are performed in these pages as the background programs scanning the transaction logs handle detail processing. The transaction pages provide a method of quick data entry for much of the transaction-based information processed by the system. You can enter the transactions directly onto the page, or attach a wedge and bar code reader to take advantage of bar code scanning benefits.

System-Generated Transactions

Several transactions that are fed in the transaction log are generated from internal application programs. By generating these transactions, applications push heavy processing functions to a background mode.

Validations, Error Handling, and Database Updates

Most inbound transactions, no matter which technology delivers them to the PeopleSoft system, are loaded into staging tables, where they are validated by background routines scanning these transaction logs awaiting incoming work. If errors are found, the transaction status in the transaction log is changed to *Error*, and rows are inserted into error tables for each error message.

Error messages appear on the Transaction Maintenance page for transactional type data such as, inventory adjustments and purchase order receipts. For definitional type data such as item master and bills of material, the Data Definition page is used to review and correct the erroneous information.

Once you have corrected the information and saved the page, the transaction is ready to be reprocessed.

Some transactions provide functionality to immediately validate and update application tables from subscription processes. For example, the Consumer and Par Location Count transactions both attempt to update the application tables, but if errors are found, the transactions write the data to the error tables so that corrections can be made.

See Also

Enterprise PeopleTools 8.45 PeopleBook: PeopleSoft Integration Broker

Using Inbound Transactions

PeopleSoft CRM provides these inbound transactions:

EIP	Object Name	PeopleSoft CRM Product	Reference
Basic Data Insert/Update	BO_BAS_RES	General Options/Common	See Chapter 3, “Setting Up General Options,” page 17 .

EIP	Object Name	PeopleSoft CRM Product	Reference
Basic Data Insert/Update	BO_BASIC_DBO	Online Marketing	See <i>PeopleSoft Enterprise Online Marketing 8.9 PeopleBook</i> , “PeopleSoft Online Marketing Integration”.
Basic Data Insert/Update	BO_BASIC_IND	Online Marketing	See <i>PeopleSoft Enterprise Online Marketing 8.9 PeopleBook</i> , “PeopleSoft Online Marketing Integration”.
Basic Data Insert/Update	BO_BASIC_ORG	Online Marketing	See <i>PeopleSoft Enterprise Online Marketing 8.9 PeopleBook</i> , “PeopleSoft Online Marketing Integration”.
Contact	CONTACT_FULLSYNC	Customer Data Model	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Managing Enterprise Integration for PeopleSoft Enterprise CRM”.
Contact	CONTACT_FULLSYNC	Customer Data Model	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Managing Enterprise Integration for PeopleSoft Enterprise CRM”.
Contact	CONTACT_FULLSYNC_EFF	Customer Data Model	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Managing Enterprise Integration for PeopleSoft Enterprise CRM”.
Contact	CONTACT_FULLSYNC_EFF	Customer Data Model	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Managing Enterprise Integration for PeopleSoft Enterprise CRM”.

EIP	Object Name	PeopleSoft CRM Product	Reference
Contact	CONTACT_SYNC	Customer Data Model	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Managing Enterprise Integration for PeopleSoft Enterprise CRM”.
Contact	CONTACT_SYNC_EFF	Customer Data Model	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Managing Enterprise Integration for PeopleSoft Enterprise CRM”.
Customer_Alternate_Capacity	CUST_ALT_CAPACITY_FULLSYNC	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Managing Enterprise Integration for PeopleSoft Enterprise CRM”.
Customer_Alternate_Capacity	CUST_ALT_CAPACITY_FULLSYNC_EFF	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Managing Enterprise Integration for PeopleSoft Enterprise CRM”.
Customer_Alternate_Capacity	CUST_ALT_CAPACITY_SYNC	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Managing Enterprise Integration for PeopleSoft Enterprise CRM”.
Customer_Alternate_Capacity	CUST_ALT_CAPACITY_SYNC_EFF	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Managing Enterprise Integration for PeopleSoft Enterprise CRM”.
Customer_Company	CUST_COMPANY_FULLSYNC	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Managing Enterprise Integration for PeopleSoft Enterprise CRM”.

EIP	Object Name	PeopleSoft CRM Product	Reference
Customer_Company	CUST_COMPANY_FULLSYNC_EFF	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Managing Enterprise Integration for PeopleSoft Enterprise CRM”.
Customer_Company	CUST_COMPANY_SYNC	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Managing Enterprise Integration for PeopleSoft Enterprise CRM”.
Customer_Company	CUST_COMPANY_SYNC_EFF	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Managing Enterprise Integration for PeopleSoft Enterprise CRM”.
Customer_Consumer	CUST_CONSUMER_FULLSYNC	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Managing Enterprise Integration for PeopleSoft Enterprise CRM”.
Customer_Consumer	CUST_CONSUMER_FULLSYNC_EFF	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Managing Enterprise Integration for PeopleSoft Enterprise CRM”.
Customer_Consumer	CUST_CONSUMER_SYNC	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Managing Enterprise Integration for PeopleSoft Enterprise CRM”.
Customer_Consumer	CUST_CONSUMER_SYNC_EFF	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Managing Enterprise Integration for PeopleSoft Enterprise CRM”.

EIP	Object Name	PeopleSoft CRM Product	Reference
Customer_Partnership	CUST_PARTNERSHIP_FULLSYNC	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Managing Enterprise Integration for PeopleSoft Enterprise CRM”.
Customer_Partnership	CUST_PARTNERSHIP_FULLSYNC_EFF	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Managing Enterprise Integration for PeopleSoft Enterprise CRM”.
Customer_Partnership	CUST_PARTNERSHIP_SYNC	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Managing Enterprise Integration for PeopleSoft Enterprise CRM”.
Customer_Partnership	CUST_PARTNERSHIP_SYNC_EFF	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Managing Enterprise Integration for PeopleSoft Enterprise CRM”.
Customer_Site	CUST_SITE_FULLSYNC	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Managing Enterprise Integration for PeopleSoft Enterprise CRM”.
Customer_Site	CUST_SITE_FULLSYNC_EFF	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Managing Enterprise Integration for PeopleSoft Enterprise CRM”.
Customer_Site	CUST_SITE_SYNC	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Managing Enterprise Integration for PeopleSoft Enterprise CRM”.

EIP	Object Name	PeopleSoft CRM Product	Reference
Expense	EXPENSE_SYNC	PeopleSoft Enterprise Integrated Field Service	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Managing Enterprise Integration for PeopleSoft Enterprise CRM”.
ATM Card Transaction-In	RBF_ATM_CARD_TRAN_IN	EXTERNAL	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Working with Agent Facing Banking Transactions”.
Financial Account Creation	RBF_FIN_ACCT_FULL_SYNC	EXTERNAL	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Setting Up Banking Services”.
Insurance Change Policy Status	RBI_CHANGE_POLICY_STATUS	EXTERNAL	See <i>PeopleSoft Enterprise Policy and Claims Presentment 8.9 PeopleBook</i> , “Working with Policies”.
Get Bill Summary	RBT_GETBILL_REQ_MSG	Energy Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries”.
Get Bill Summary	RBT_GETBILL_REQ_MSG	Communications Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries”.
Get Bill Events	RBT_GETBILLEVENTS_REQ_MSG	Energy Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries”.

EIP	Object Name	PeopleSoft CRM Product	Reference
Get Bill Events	RBT_ GETBILLEVENTS_ REQ_MSG	Communications Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries”.
Get Bill Events	RBT_ GETBILLEVENTS_ RPY_MSG	EXTERNAL	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries”.
Get Bill Events	RBT_ GETBILLEVENTS_ RPY_MSG	EXTERNAL	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries”.
Get Bill Items	RBT_GETBILLITEMS_ REQ_MSG	Energy Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries”.
Get Bill Items	RBT_GETBILLITEMS_ REQ_MSG	Energy Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries”.
Get Bill Items	RBT_GETBILLITEMS_ REQ_MSG	Communications Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries”.

EIP	Object Name	PeopleSoft CRM Product	Reference
Get Bill Items	RBT_GETBILLITEMS_REQ_MSG	Communications Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries”.
Get Bill Items	RBT_GETBILLITEMS_RPLY_MSG	EXTERNAL	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries”.
Get Bill Items	RBT_GETBILLITEMS_RPLY_MSG	EXTERNAL	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries”.
Get Bill Summary	RBT_GETBILLS_RPLY_MSG	EXTERNAL	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries”.
Get Bill Summary	RBT_GETBILLS_RPLY_MSG	EXTERNAL	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries”.
Case Inquiry Request Message	RC_CASE_INQUIRY_REQ_SYNC	EXTERNAL	See <i>PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook</i> , “Integrating the Case with Third-Party Systems”.

EIP	Object Name	PeopleSoft CRM Product	Reference
Case Creation or Updation Message	RC_CASE_REQUEST_ASYNC	EXTERNAL	See <i>PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook</i> , “Integrating the Case with Third-Party Systems”.
Case Creation or Update Request Message	RC_CASE_REQUEST_SYNC	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook</i> , “Integrating the Case with Third-Party Systems,” Defining Case EIP Functionality.
Representative	REP_SYNC	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.
Representative Full Sync	REP_SYNC_FULLSYNC	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.
Service_Location	SERVICE_LOCATION_FULLSYNC	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Data Management for Organization Business Objects”.
Service_Location	SERVICE_LOCATION_FULLSYNC_EFF	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Data Management for Organization Business Objects”.
Service_Location	SERVICE_LOCATION_SYNC	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Data Management for Organization Business Objects”.

EIP	Object Name	PeopleSoft CRM Product	Reference
Service_Location	SERVICE_LOCATION_SYNC_EFF	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Data Management for Organization Business Objects”.
Worker	WORKER_FULLSYNC	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.
Worker	WORKER_FULLSYNC_EFF	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.
Worker	WORKER_SYNC	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.
Worker	WORKER_SYNC_EFF	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.

Processing Outbound Application Message Transactions

Outbound EIPs exist throughout the PeopleSoft system, providing interface points for third-party applications requiring information as activity occurs within the PeopleSoft system. The PeopleSoft Application Messaging technology is utilized to format and publish industry standard XML messages. For example, as item master information is entered into PeopleSoft applications, the system generates XML-based messages and delivers them to third-party systems requiring this information to set up their own item master tables.

Understanding the Outbound Transaction Architecture

PeopleSoft CRM applications as well as interacting third-party systems have various processing and timing requirements that dictate when information can be generated or received. For this reason, the integration points provided by PeopleSoft utilize a number of different approaches when generating outbound application messages.

For example, a third-party system requiring item master information from the PeopleSoft Inventory application may want immediate incremental updates as information is changed online or may want periodic updates on a nightly or weekly basis. The Item Master EIP provides both options, giving the third-party system the choice as to how it wants to receive this information.

Component or Incremental Publish

The system generates Component Published messages immediately upon saving a component in various PeopleSoft applications. Components used to maintain setup type information such as items or customers utilize the Component Publish approach.

Batch Publish

Batch Publish messages provide the functionality to group many like transactions into a single message.

Background processes that work on batches of transactions at one time utilize this approach.

In addition, other processes use this approach where interface requirements demand various groupings of like transactions based on common information within each transaction. For example, an Advanced Shipping Notice message can be published to a customer when the customer's order is shipped within the PeopleSoft Inventory system. This message may go directly to the customer or it may go through third-party software that converts the XML message to one of the industry standard EDI formats, such as X.12, before passing it on to the customer. Using the options available with the Batch Publish approach, users can dictate whether to create a single message for all customers to send to the third-party software or create individual messages to send directly to each customer.

PeopleSoft CRM applications all use the Publish Outbound Message process to initiate the Batch Publish messages. Built into this routine is the Batch Publish utility, a common PeopleSoft tool that provides the functionality to group and filter or "chunk" messages as noted in the previous example.

The Batch Publish utility also provides the option to create flat files instead of XML messages, when file layout objects exist for transactions being generated. File layout objects are easy to modify, and PeopleSoft provides examples for all transactions included in the EDI feature.

Full Data Replication

Full data replication is the process used to seed, or initially populate or repopulate, a copy of an entire table onto a remote database or legacy system. The entire contents of the table are published to all systems that require a copy of the table. Generally, full data replication occurs with setup tables—that is, relatively static, low volume tables keyed by setID.

Once a copy of the table exists, incremental updates provide a mechanism or process to keep the copy up-to-date with changes made on the master. Incremental updates occur most often with transaction tables—that is, frequently updated tables keyed by business unit.

Most full data replication message names end in _FULLSYNC.

Using Outbound Transactions

PeopleSoft CRM provides these outbound transactions:

EIP	Object Name	PeopleSoft CRM Product	Reference
Basic Data Insert/Update	BO_BAS_RES	General Options/Common	See Appendix A, “Managing PeopleSoft Customer Relationship Management Integration Points,” Processing Outbound Application Message Transactions, page 440.
Basic Data Insert/Update	BO_BASIC_DBO	Online Marketing	See <i>PeopleSoft Enterprise Online Marketing 8.9 PeopleBook</i> , “PeopleSoft Online Marketing Integration”.
Basic Data Insert/Update	BO_BASIC_IND	Online Marketing	See <i>PeopleSoft Enterprise Online Marketing 8.9 PeopleBook</i> , “PeopleSoft Online Marketing Integration”.
Basic Data Insert/Update	BO_BASIC_ORG	Online Marketing	See <i>PeopleSoft Enterprise Online Marketing 8.9 PeopleBook</i> , “PeopleSoft Online Marketing Integration”.
Contact	CONTACT_FULLSYNC	Customer Data Model	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.
Contact	CONTACT_FULLSYNC	Customer Data Model	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.
Contact	CONTACT_FULLSYNC_EFF	Customer Data Model	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.

EIP	Object Name	PeopleSoft CRM Product	Reference
Contact	CONTACT_FULLSYNC_EFF	Customer Data Model	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.
Contact	CONTACT_SYNC	Customer Data Model	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.
Contact	CONTACT_SYNC	Customer Data Model	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.
Contact	CONTACT_SYNC_EFF	Customer Data Model	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.
Publish Quote	CRM_QUOTE	PeopleSoft Enterprise Order Capture	See <i>PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook</i> , “Managing Orders and Quotes”.
Publish Order	CRM_SALES_ORDER	PeopleSoft Enterprise Order Capture	See <i>PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook</i> , “Managing Orders and Quotes”.
Publish Order Change	CRM_SALES_ORDER_CHANGE	PeopleSoft Enterprise Order Capture	See <i>PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook</i> , “Managing Orders and Quotes”.
Customer_Alternate_Capacity	CUST_ALT_CAPACITY_FULLSYNC	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.

EIP	Object Name	PeopleSoft CRM Product	Reference
Customer_Alternate_Capacity	CUST_ALT_CAPACITY_FULLSYNC_EFF	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.
Customer_Alternate_Capacity	CUST_ALT_CAPACITY_SYNC	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.
Customer_Alternate_Capacity	CUST_ALT_CAPACITY_SYNC_EFF	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.
Customer_Company	CUST_COMPANY_FULLSYNC	General Options/Common	See Appendix A, “Managing PeopleSoft Customer Relationship Management Integration Points,” Processing Outbound Application Message Transactions, page 440.
Customer_Company	CUST_COMPANY_FULLSYNC_EFF	General Options/Common	See Appendix A, “Managing PeopleSoft Customer Relationship Management Integration Points,” Processing Outbound Application Message Transactions, page 440.
Customer_Company	CUST_COMPANY_SYNC	General Options/Common	See Appendix A, “Managing PeopleSoft Customer Relationship Management Integration Points,” Processing Outbound Application Message Transactions, page 440.

EIP	Object Name	PeopleSoft CRM Product	Reference
Customer_Company	CUST_COMPANY_SYNC_EFF	General Options/Common	See Appendix A, “Managing PeopleSoft Customer Relationship Management Integration Points,” Processing Outbound Application Message Transactions, page 440.
Customer_Consumer	CUST_CONSUMER_FULLSYNC	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.
Customer_Consumer	CUST_CONSUMER_FULLSYNC_EFF	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.
Customer_Consumer	CUST_CONSUMER_SYNC	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.
Customer_Consumer	CUST_CONSUMER_SYNC_EFF	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.
Customer_Partnership	CUST_PARTNERSHIP_FULLSYNC	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.
Customer_Partnership	CUST_PARTNERSHIP_FULLSYNC_EFF	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.

EIP	Object Name	PeopleSoft CRM Product	Reference
Customer_Partnership	CUST_PARTNERSHIP_SYNC	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.
Customer_Partnership	CUST_PARTNERSHIP_SYNC_EFF	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.
Customer_Site	CUST_SITE_FULLSYNC	General Options/Common	See Appendix A, “Managing PeopleSoft Customer Relationship Management Integration Points,” Processing Outbound Application Message Transactions , page 440.
Customer_Site	CUST_SITE_FULLSYNC_EFF	General Options/Common	See Appendix A, “Managing PeopleSoft Customer Relationship Management Integration Points,” Processing Outbound Application Message Transactions , page 440.
Customer_Site	CUST_SITE_SYNC	General Options/Common	See Appendix A, “Managing PeopleSoft Customer Relationship Management Integration Points,” Processing Outbound Application Message Transactions , page 440.
Customer_Site	CUST_SITE_SYNC_EFF	General Options/Common	See Appendix A, “Managing PeopleSoft Customer Relationship Management Integration Points,” Processing Outbound Application Message Transactions , page 440.

EIP	Object Name	PeopleSoft CRM Product	Reference
Get Geo Code	ESRI_ADDRESS_US_MSG	Government Industry	See <i>PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook</i> , “ESRI Integration”.
Get Geo Code	ESRI_GEO_CODE_US_MSG	ESRI	See <i>PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook</i> , “ESRI Integration”.
Get Map Extents	ESRI_MAP_EXT_REPLY_MSG	ESRI	See <i>PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook</i> , “ESRI Integration”.
Get Map Extents	ESRI_MAP_EXT_REQ_MSG	Government Industry	See <i>PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook</i> , “ESRI Integration”.
Get Map	ESRI_MAP_REPLY_MSG	ESRI	See <i>PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook</i> , “ESRI Integration”.
Get Map	ESRI_MAP_REQ_MSG	Government Industry	See <i>PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook</i> , “ESRI Integration”.
Expense	EXPENSE_SYNC	PeopleSoft Enterprise Integrated Field Service	See <i>PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook</i> , “PeopleSoft Product Integration”.
Hr_Helpdesk_360	HD_360_REQUEST_SYNC	PeopleSoft Enterprise Support	See <i>PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook</i> , “Defining EIP Options for Integration to PeopleSoft HRMS”.

EIP	Object Name	PeopleSoft CRM Product	Reference
Order Capture ESA Proposal	OC_ESA_PROPOSAL	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook</i> , “Integrating with Fulfillment and Billing Systems,” Activating EIPs.
Order Capture ESA Proposal Status	OC_ESA_PROPOSAL_STATUS	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook</i> , “Integrating with Fulfillment and Billing Systems,” Activating EIPs.
Marketing Audience	RA_OM_AUDIENCE_MSG	PeopleSoft Enterprise Marketing	See <i>PeopleSoft Enterprise CRM 8.9 Marketing Applications PeopleBook</i> , “Using Audiences”.
Customer Profile	RA_PROFILE_MSG	PeopleSoft Enterprise Marketing	See <i>PeopleSoft Enterprise CRM 8.9 Marketing Applications PeopleBook</i> , “Setting Up PeopleSoft Marketing and Telemarketing”.
OLM Response	RA_RESPONSE	Online Marketing	See <i>PeopleSoft Enterprise Online Marketing 8.9 PeopleBook</i> , “PeopleSoft Online Marketing Integration”.
Financial Account Nickname	RBF_ACCT_NN_MSG	Financial Services Industry	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Working with Agent Facing Banking Transactions,” Administering Banking Accounts.
Automatic Funds Transfer	RBF_AFND_TR_MSG	Financial Services Industry	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Setting Up Internet Banking”.

EIP	Object Name	PeopleSoft CRM Product	Reference
ATM Card Transaction - Out	RBF_ATM_CARD_TRAN_OUT	Financial Services Industry	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Setting Up Internet Banking”.
Bill Payment History	RBF_BILL_PAY_HISTORY	External	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Setting Up Internet Banking”.
Bill Payment History	RBF_BILL_PAY_HISTORY_REQ	Financial Services Industry	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Setting Up Internet Banking”.
Bill Payment History	RBF_BILL_PAY_HISTORY_RES	External	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Setting Up Internet Banking”.
Change Financial Account Address	RBF_CHG_ACTADR_MSG	Financial Services Industry	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Setting Up Internet Banking”.
Close Financial Account	RBF_CLOSE_ISSUE_MSG	External	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Setting Up Internet Banking”.
Fee Reversal	RBF_FEE_REVERSAL	Financial Services Industry	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Setting Up Internet Banking”.
Financial Account Address	RBF_FINACCT_ADDRESS	External	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Setting Up Internet Banking”.
Financial Account Fees	RBF_FINACCT_FEES	External	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Setting Up Internet Banking”.

EIP	Object Name	PeopleSoft CRM Product	Reference
Financial Account Relationships	RBF_FINACCT_RELATIONSHIPS	External	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Setting Up Internet Banking”.
Financial Account Security	RBF_FINACCT_SECURITY	External	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Setting Up Internet Banking”.
Financial Account Security By Role	RBF_FINACCT_SECURITY_BYROLE	External	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Setting Up Internet Banking”.
Transfer Funds	RBF_FUNDS_TRANSFER_REQ	Financial Services Industry	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Setting Up Internet Banking”.
Transfer Funds	RBF_FUNDS_TRANSFER_RES	External	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Setting Up Internet Banking”.
Close Financial Account	RBF_ISSUE_CLOSE_ACCT	Financial Services Industry	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Setting Up Internet Banking”.
Close Financial Account - From Legacy	RBF_ISSUE_CLOSE_ACCT_RESPONSE	External	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Setting Up Internet Banking”.
Modify Account	RBF_MODACCT_MSG	Financial Services Industry	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Setting Up Internet Banking”.
Order Cashiers Check	RBF_ORD_CCHK_MSG	Financial Services Industry	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Setting Up Internet Banking”.

EIP	Object Name	PeopleSoft CRM Product	Reference
Order Checks	RBF_ORD_CHK_MSG	Financial Services Industry	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Setting Up Internet Banking”.
Order Documents	RBF_ORD_DOC_MSG	Financial Services Industry	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Setting Up Internet Banking”.
Order Foreign Currency	RBF_ORD_FCUR_MSG	Financial Services Industry	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Setting Up Internet Banking”.
Order Travelers Checks	RBF_ORD_TCHK_MSG	Financial Services Industry	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Setting Up Internet Banking”.
Incoming Quote	RBF_QUOTE	External	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Setting Up Internet Banking”.
Reorder Checks	RBF_REO_CHK_MSG	Financial Services Industry	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Setting Up Internet Banking”.
Sales Entry For Financial Account	RBF_SALES_ENTRY	Financial Services Industry	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Setting Up Internet Banking”.
Stop Check Payment	RBF_STP_PAY_MSG	Financial Services Industry	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Setting Up Internet Banking”.
Transaction History For Financial Account	RBF_VIEW_TRANS_REQ	Financial Services Industry	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Setting Up Internet Banking”.

EIP	Object Name	PeopleSoft CRM Product	Reference
Transaction History For Financial Account	RBF_VIEW_TRANS_RES	External	See <i>PeopleSoft Enterprise Banking Transactions 8.9 PeopleBook</i> , “Setting Up Internet Banking”.
Get Map Extents	RBG_MAP_EXT_REPLY_MSG	External	See <i>PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook</i> , “ESRI Integration”.
Get Map Extents	RBG_MAP_EXT_REQ_MSG	Government Industry	See <i>PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook</i> , “ESRI Integration”.
Get Map	RBG_MAP_REPLY_MSG	External	See <i>PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook</i> , “ESRI Integration”.
Get Map	RBG_MAP_REQ_MSG	Government Industry	See <i>PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook</i> , “ESRI Integration”.
Get Geo Code	RBG_SYNC_ADDRESS_US_MSG	Government Industry	See <i>PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook</i> , “ESRI Integration”.
Get Geo Code	RBG_SYNC_GEO_CODE_US_MSG	External	See <i>PeopleSoft Enterprise CRM 8.9 Services Foundation PeopleBook</i> , “ESRI Integration”.
Insurance Billing History	RBI_BILLING_HISTORY	External	See <i>PeopleSoft Enterprise Policy and Claims Presentment 8.9 PeopleBook</i> , “Understanding EIPs for PeopleSoft Enterprise Policy and Claims Presentment,” EIPs for PeopleSoft Policy and Claims Presentment.

EIP	Object Name	PeopleSoft CRM Product	Reference
Insurance Billing History - Sync Message	RBI_BILLING_HISTORY_REQ	Insurance Industry	See <i>PeopleSoft Enterprise Policy and Claims Presentment 8.9 PeopleBook</i> , “Understanding EIPs for PeopleSoft Enterprise Policy and Claims Presentment,” EIPs for PeopleSoft Policy and Claims Presentment.
Insurance Billing History - Sync Message	RBI_BILLING_HISTORY_RES	External	See <i>PeopleSoft Enterprise Policy and Claims Presentment 8.9 PeopleBook</i> , “Understanding EIPs for PeopleSoft Enterprise Policy and Claims Presentment,” EIPs for PeopleSoft Policy and Claims Presentment.
Insurance Change Policy - Sync Message	RBI_CHANGE_POLICY_REQ	Insurance Industry	See <i>PeopleSoft Enterprise Policy and Claims Presentment 8.9 PeopleBook</i> , “Understanding EIPs for PeopleSoft Enterprise Policy and Claims Presentment,” EIPs for PeopleSoft Policy and Claims Presentment.
Insurance Claim Details	RBI_CLAIM_DETAILS	External	See <i>PeopleSoft Enterprise Policy and Claims Presentment 8.9 PeopleBook</i> , “Understanding EIPs for PeopleSoft Enterprise Policy and Claims Presentment,” EIPs for PeopleSoft Policy and Claims Presentment.

EIP	Object Name	PeopleSoft CRM Product	Reference
Insurance Claim Header Creation	RBI_CLAIM_HDR	External	See <i>PeopleSoft Enterprise Policy and Claims Presentment 8.9 PeopleBook</i> , “Understanding EIPs for PeopleSoft Enterprise Policy and Claims Presentment,” EIPs for PeopleSoft Policy and Claims Presentment.
Insurance Claim Details - Sync Message	RBI_CLAIMNO_RES	External	See <i>PeopleSoft Enterprise Policy and Claims Presentment 8.9 PeopleBook</i> , “Understanding EIPs for PeopleSoft Enterprise Policy and Claims Presentment,” EIPs for PeopleSoft Policy and Claims Presentment.
Insurance Claim Details - Sync Message	RBI_CLAIMNO_SYNC	Insurance Industry	See <i>PeopleSoft Enterprise Policy and Claims Presentment 8.9 PeopleBook</i> , “Understanding EIPs for PeopleSoft Enterprise Policy and Claims Presentment,” EIPs for PeopleSoft Policy and Claims Presentment.
Insurance Publish Issue	RBI_ISSUE_PUBLISH	Insurance Industry	See <i>PeopleSoft Enterprise Policy and Claims Presentment 8.9 PeopleBook</i> , “Understanding EIPs for PeopleSoft Enterprise Policy and Claims Presentment,” EIPs for PeopleSoft Policy and Claims Presentment.

EIP	Object Name	PeopleSoft CRM Product	Reference
Insurance Payment History	RBI_PAYMENT_HISTORY	External	See <i>PeopleSoft Enterprise Policy and Claims Presentment 8.9 PeopleBook</i> , “Understanding EIPs for PeopleSoft Enterprise Policy and Claims Presentment,” EIPs for PeopleSoft Policy and Claims Presentment.
Insurance Payment History - Sync Message	RBI_PAYMENT_HISTORY_REQ	Insurance Industry	See <i>PeopleSoft Enterprise Policy and Claims Presentment 8.9 PeopleBook</i> , “Understanding EIPs for PeopleSoft Enterprise Policy and Claims Presentment,” EIPs for PeopleSoft Policy and Claims Presentment.
Insurance Payment History - Sync Message	RBI_PAYMENT_HISTORY_RES	External	See <i>PeopleSoft Enterprise Policy and Claims Presentment 8.9 PeopleBook</i> , “Understanding EIPs for PeopleSoft Enterprise Policy and Claims Presentment,” EIPs for PeopleSoft Policy and Claims Presentment.
Insurance Policy Creation	RBI_POLICY	External	See <i>PeopleSoft Enterprise Policy and Claims Presentment 8.9 PeopleBook</i> , “Understanding EIPs for PeopleSoft Enterprise Policy and Claims Presentment,” EIPs for PeopleSoft Policy and Claims Presentment.

EIP	Object Name	PeopleSoft CRM Product	Reference
Insurance Change Policy - Sync Message	RBI_QUOTE	Insurance Industry	See <i>PeopleSoft Enterprise Policy and Claims Presentment 8.9 PeopleBook</i> , “Understanding EIPs for PeopleSoft Enterprise Policy and Claims Presentment,” EIPs for PeopleSoft Policy and Claims Presentment.
Insurance Change Policy - Sync Message	RBI_QUOTE	Insurance Industry	See <i>PeopleSoft Enterprise Policy and Claims Presentment 8.9 PeopleBook</i> , “Understanding EIPs for PeopleSoft Enterprise Policy and Claims Presentment,” EIPs for PeopleSoft Policy and Claims Presentment.
Insurance Sales	RBI_SALES	Insurance Industry	See <i>PeopleSoft Enterprise Policy and Claims Presentment 8.9 PeopleBook</i> , “Understanding EIPs for PeopleSoft Enterprise Policy and Claims Presentment,” EIPs for PeopleSoft Policy and Claims Presentment.
View Account Balance	RBT_ACTBAL_REQ_MSG	Energy Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Managing Accounts and Viewing Bills”.
View Account Balance	RBT_ACTBAL_REQ_MSG	Communications Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Managing Accounts and Viewing Bills”.

EIP	Object Name	PeopleSoft CRM Product	Reference
View Account Balance	RBT_ACTBAL_RPLY_MSG	External	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Managing Accounts and Viewing Bills”.
View Account Balance	RBT_ACTBAL_RPLY_MSG	External	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Managing Accounts and Viewing Bills”.
Change Service	RBT_ACTSRVC_MSG	Energy Industry	See <i>PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook</i> , “Integrating with Fulfillment and Billing Systems,” Activating EIPs.
Change Service	RBT_ACTSRVC_MSG	Communications Industry	See <i>PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook</i> , “Integrating with Fulfillment and Billing Systems,” Activating EIPs.
Account Status	RBT_ACTSTATUS_MSG	Energy Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Managing Accounts and Viewing Bills”.
Account Status	RBT_ACTSTATUS_MSG	Communications Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Managing Accounts and Viewing Bills”.

EIP	Object Name	PeopleSoft CRM Product	Reference
View Account Usage	RBT_ACTUSG_REQ_MSG	Energy Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Managing Accounts and Viewing Bills”.
View Account Usage	RBT_ACTUSG_REQ_MSG	Communications Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Managing Accounts and Viewing Bills”.
View Account Usage	RBT_ACTUSG_RPLY_MSG	External	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Managing Accounts and Viewing Bills”.
View Account Usage	RBT_ACTUSG_RPLY_MSG	External	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Managing Accounts and Viewing Bills”.
Change Service	RBT_ADDSRVCFT_MSG	Energy Industry	See <i>PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook</i> , “Integrating with Fulfillment and Billing Systems,” Activating EIPs.
Change Service	RBT_ADDSRVCFT_MSG	Communications Industry	See <i>PeopleSoft Enterprise CRM 8.9 Order Capture Applications PeopleBook</i> , “Integrating with Fulfillment and Billing Systems,” Activating EIPs.

EIP	Object Name	PeopleSoft CRM Product	Reference
Create Dispute	RBT_BILL_DISP_MSG	Energy Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.
Create Dispute	RBT_BILL_DISP_MSG	Communications Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.
Change Billing Address	RBT_CHANGADDR_MSG	Energy Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.
Change Billing Address	RBT_CHANGADDR_MSG	Communications Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.
Churn Message	RBT_CHURN_MSG	External	See <i>PeopleSoft Enterprise CRM 8.9 Industry Application Fundamentals PeopleBook</i> , “Using Churn Management”.
Churn Message	RBT_CHURN_MSG	External	See <i>PeopleSoft Enterprise CRM 8.9 Industry Application Fundamentals PeopleBook</i> , “Using Churn Management”.

EIP	Object Name	PeopleSoft CRM Product	Reference
Get Bill Summary	RBT_GETBILL_REQ_MSG	Energy Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.
Get Bill Summary	RBT_GETBILL_REQ_MSG	Communications Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.
Get Bill Events	RBT_GETBILLEVENTS_REQ_MSG	Energy Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.
Get Bill Events	RBT_GETBILLEVENTS_REQ_MSG	Communications Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.
Get Bill Events	RBT_GETBILLEVENTS_RPY_MSG	External	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.

EIP	Object Name	PeopleSoft CRM Product	Reference
Get Bill Events	RBT_GETBILLEVENTS_RPY_MSG	External	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.
Get Bill Items	RBT_GETBILLITEMS_REQ_MSG	Energy Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.
Get Bill Items	RBT_GETBILLITEMS_REQ_MSG	Energy Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.
Get Bill Items	RBT_GETBILLITEMS_REQ_MSG	Communications Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.
Get Bill Items	RBT_GETBILLITEMS_REQ_MSG	Communications Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.

EIP	Object Name	PeopleSoft CRM Product	Reference
Get Bill Items	RBT_GETBILLITEMS_RPLY_MSG	External	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.
Get Bill Items	RBT_GETBILLITEMS_RPLY_MSG	External	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.
Get Bill Summary	RBT_GETBILLS_RPLY_MSG	External	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.
Get Bill Summary	RBT_GETBILLS_RPLY_MSG	External	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.
Add Service	RBT_IPSTATUS_MSG	External	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.

EIP	Object Name	PeopleSoft CRM Product	Reference
Add Service	RBT_IPSTATUS_MSG	External	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.
Create Account	RBT_NEWACR_RPLY_MSG	External	See <i>PeopleSoft Enterprise CRM 8.9 Industry Application Fundamentals PeopleBook</i> , “Working with Financial Accounts”.
Create Account	RBT_NEWACR_RPLY_MSG	External	See <i>PeopleSoft Enterprise CRM 8.9 Industry Application Fundamentals PeopleBook</i> , “Working with Financial Accounts”.
Create Account	RBT_NEWACT_REQ_MSG	Energy Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.
Create Account	RBT_NEWACT_REQ_MSG	Communications Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.
Add Service	RBT_NEWSRVC_MSG	Energy Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.

EIP	Object Name	PeopleSoft CRM Product	Reference
Add Service	RBT_NEWSRVC_MSG	Communications Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.
Change Payment Details	RBT_PAYINFO_MSG	Energy Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.
Change Payment Details	RBT_PAYINFO_MSG	Communications Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.
Add Service Feature	RBT_PROSRVC_MSG	Energy Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.
Add Service Feature	RBT_PROSRVC_MSG	Communications Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.

EIP	Object Name	PeopleSoft CRM Product	Reference
Disconnect Service	RBT_REMOVESRVC_MSG	Energy Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.
Disconnect Service	RBT_REMOVESRVC_MSG	Communications Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.
Change Service	RBT_REMOVESRVCFT_MSG	Energy Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.
Change Service	RBT_REMOVESRVCFT_MSG	Communications Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.
Installed Product Message	RBT_SERVICEMGMT_MSG	Energy Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.

EIP	Object Name	PeopleSoft CRM Product	Reference
Installed Product Message	RBT_SERVICEMGMT_MSG	Communications Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.
Suspend Service	RBT_SUSPENDSRVC_MSG	Energy Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.
Suspend Service	RBT_SUSPENDSRVC_MSG	Communications Industry	See <i>PeopleSoft Enterprise Bill Presentment and Account Management 8.9 PeopleBook</i> , “Integrating Billing with Communication and Energy Industries,” Understanding EIPs.
Case Inquiry Response Message	RC_CASE_INQUIRY_RESP_SYNC	PeopleSoft Enterprise Support	See <i>PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook</i> , “Integrating the Case with Third-Party Systems”.
Case Inquiry Response Message	RC_CASE_INQUIRY_RESP_SYNC	PeopleSoft Enterprise HelpDesk	See <i>PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook</i> , “Integrating the Case with Third-Party Systems”.
Case Inquiry Response Message	RC_CASE_INQUIRY_RESP_SYNC	PeopleSoft Enterprise HelpDesk for Human Resources	See <i>PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook</i> , “Integrating the Case with Third-Party Systems”.

EIP	Object Name	PeopleSoft CRM Product	Reference
Case Confirmation Message	RC_CASE_RESPONSE_ASYNC	PeopleSoft Enterprise Support	See <i>PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook</i> , “Integrating the Case with Third-Party Systems”.
Case Confirmation Message	RC_CASE_RESPONSE_ASYNC	PeopleSoft Enterprise Support	See <i>PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook</i> , “Integrating the Case with Third-Party Systems”.
Case Confirmation Response Message	RC_CASE_RESPONSE_SYNC	PeopleSoft Enterprise HelpDesk	See <i>PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook</i> , “Integrating the Case with Third-Party Systems”.
Case Confirmation Response Message	RC_CASE_RESPONSE_SYNC	PeopleSoft Enterprise HelpDesk for Human Resources	See <i>PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook</i> , “Integrating the Case with Third-Party Systems”.
Case Confirmation Response Message	RC_CASE_RESPONSE_SYNC	PeopleSoft Enterprise HelpDesk	See <i>PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook</i> , “Integrating the Case with Third-Party Systems”.
Case Confirmation Response Message	RC_CASE_RESPONSE_SYNC	PeopleSoft Enterprise HelpDesk for Human Resources	See <i>PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook</i> , “Integrating the Case with Third-Party Systems”.
Case Confirmation Response Message	RC_CASE_RESPONSE_SYNC	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Call Center Applications PeopleBook</i> , “Integrating the Case with Third-Party Systems”.
Representative	REP_FULLSYNC_EFF	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.

EIP	Object Name	PeopleSoft CRM Product	Reference
Representative	REP_SYNC	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.
Representative	REP_SYNC_EFF	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.
Representative Full Sync	REP_SYNC_FULLSYNC	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.
Service_Location	SERVICE_LOCATION_FULLSYNC	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Data Management for Organization Business Objects”.
Service_Location	SERVICE_LOCATION_FULLSYNC_EFF	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Data Management for Organization Business Objects”.
Service_Location	SERVICE_LOCATION_SYNC	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Data Management for Organization Business Objects”.
Service_Location	SERVICE_LOCATION_SYNC_EFF	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Data Management for Organization Business Objects”.

EIP	Object Name	PeopleSoft CRM Product	Reference
Service Order	SERVICE_ORDER_SYNC	PeopleSoft Enterprise Integrated Field Service	See <i>PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook</i> , “Integrating with PeopleSoft Applications”.
Table Set Control	SETID_INITIALIZE	General Options/Common	See Chapter 2, “Working with Business Units and TableSet Controls,” page 7 .
Time	TIME_SYNC	PeopleSoft Enterprise Integrated Field Service	See <i>PeopleSoft Enterprise Integrated FieldService 8.9 PeopleBook</i> , “Integrating with PeopleSoft Applications”.
Worker	WORKER_FULLSYNC	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.
Worker	WORKER_FULLSYNC_EFF	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.
Worker	WORKER_SYNC	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.
Worker	WORKER_SYNC_EFF	General Options/Common	See <i>PeopleSoft Enterprise CRM 8.9 Business Object Management PeopleBook</i> , “Customer and Worker Data Integrations”.

Setting Up Chunking

This section provides an overview of chunking and discusses how to set up chunking.

Understanding Chunking

If you are publishing application messages, you may want to set up chunking. When chunking, the system automatically breaks up messages into several smaller messages based on the values in one or more of the fields in the level zero record. For example, if you want to chunk by business unit, messages would be broken up by business unit sending each business unit's transactions to a node that you have defined. Another example would be for sites sending EDI messages directly to trading partners. If you are sending purchase orders directly to a vendor then you want to make sure that that vendor gets only their transactions. Chunking provides the ability to split a batch of purchase orders into separate messages based on the trading partner. The Integration Broker then provides tools to route the message to specific nodes based on that trading partner identification, in this case the vendor ID.

Note. If you are using a middleware product to transform and route transactions to trading partners then you most likely will not need to use message chunking. All messages would go to the node defined for the middleware product.

Chunking is implemented using the Batch Publish Utility or the Full Data Publish Utility. In either case a batch publish rule is created and a *chunking rule* can be attached. The chunking rule defines a table containing a set of values that map to specific nodes. For example, in the example above where you are chunking by vendor ID, the chunking rule table would contain a set of vendor IDs that map to individual nodes for trading partners receiving the purchase order message.

The following is an step by step explanation of the process flow of a transaction using message chunking:

1. Chunking Selection

Run process that generated message. This may be the Full Data Publish Utility or one of the batch based messages that use the Batch Publish Utility.

Note. All messages generated from the Publish Outbound Messages use the Batch Publish Utility.

When the batch publish utility or full data publish utilities run they recognize the chunking rule assigned to the batch publish rule and split the different transactions into separate messages for each chunking rule value. They then publish the message handing it over to the Integration Broker.

2. Chunking Node Routing

The Integration Broker makes the decision of which node will receive the Message. Standard processing for the Integration Broker is to send the message to any node that has a transaction setup for that message. When chunking, you want to override the standard method of processing and force the Integration Broker to send the message only to the node for which the message was intended. This is done by assigning OnRouteSend PeopleCode to the message in the Application Designer. When OnRouteSend PeopleCode exists on a message the Integration Broker will only send the message to the nodes that it is told to by this routine. PeopleSoft provides some common functions that can be used for this purpose. The setup instructions for different messages explain exactly how to setup the OnRouteSend PeopleCode for messages where in most cases when using a chunking rule with the batch publish utility or the full data publish utility all you need to do to override the Integration Brokers standard processing is to add the following PeopleCode to the OnRouteSend PeopleCode for the message being sent.

Note. Incremental Publish messages do not use message chunking as defined above. By definition, incremental published messages do not need the Chunking Selection step because they only contain a single transaction. But, if incremental publish messages need to be sent to specific nodes based on values in the message then the Chunking Node Routing step defined above would still be required.

PeopleSoft provides a number of chunking rules, chunking rule tables, data entry pages and OnRouteSend functions that can be used to maintain node mappings and routing rules for some of the more commonly used field values. The data entry pages are noted in the Pages Used to Set up Chunking table below. Information about setup for specific messages is provided in the PeopleBook for the actual application publishing the message. Additional information is provided in the PeopleSoft Enterprise Components PeopleBook explaining how to create your own customized chunking rule, chunking rule table and data entry pages.

For an example of how multiple chunking rules can be setup on a single message look at the batch publish rules for the ADVANCED_SHIPPING_NOTICE Message. These batch publish rules were provided as examples to show the power of message chunking. In this example, the ADVANCED_SHIPPING_NOTICE rule is the standard rule used without chunking. If you want to chunk by Business Unit just attach the Business Unit chunk rule to the batch publish rule. You would also have to populate the Business Unit to node values in the chunk table and set up the OnRouteSend Routing Rule on the Message. In this case, to setup the routing rule you would add the following to the OnRouteSend people code on the ADVANCED_SHIPPING_NOTICE message:

```
Declare Function GetNodes PeopleCode
FUNCLIB_INEIP.PUBLISH_ROUTE_PC FieldFormula;
GetNodes ( " " );
```

If you want to chunk by Ship To Customer then activate the ASN_SETID_SHIPTO batch publish rule. In this case you also need to populate the customer chunk rule table and setup the OnRouteSend Routing Rule.

If you want to chunk by Sold To Customer then setup the ASN_SETID_SOLDTO chunk rule, populate the customer chunk rule table and setup the OnRouteSend Routing Rule.

See Also

PeopleSoft Enterprise Components for CRM 8.9 PeopleBook

Pages Used to Set Up Chunking

Page Name	Object Name	Navigation	Usage
Add Nodes to Chunk Rule	EO_ADNODECHUNK_PNL	Enterprise Components, Integration Definition, Map Chunking Rules, Node to ChunkRule, Add Nodes to Chunk Rule	Map nodes by Chunk Rules.
BusUnit Mapping	EO_CHUNKBU	Enterprise Components, Integration Definition, Map Chunking Rules, Business Units, BusUnit Mapping	Maintain ChunkRule business unit mapping.
Quick Map	EO_ADDBUNODE_PNL	Enterprise Components, Integration Definition, Map Chunking Rules, BU to ChunkRule/Node, Quick Map	Map business units by ChunkRules or nodes.
Map Business Unit	EO_ADDNODEBU_PNL	Enterprise Components, Integration Definition, Map Chunking Rules, ChunkRule/Node to BU, Map Business Unit	Map ChunkRules or nodes by business unit.

Page Name	Object Name	Navigation	Usage
SetId Mapping	EO_CHUNKSETID	Enterprise Components, Integration Definition, Map Chunking Rules, Setids, Setid Mapping	Maintain ChunkRule setID mapping.
Quick Map	EO_ADDSIDNODE_PNL	Enterprise Components, Integration Definition, Map Chunking Rules, Setid to ChunkRule/Node, Quick Map	Map setIDs by ChunkRules or nodes.
Map Set IDs	EO_ADDNODESID_PNL	Enterprise Components, Integration Definition, Map Chunking Rules, ChunkRule/Node to Setid, Map Set IDs	Map ChunkRules by setID.
Customer ID Chunk	OM_CHUNKCUSTID	Data Exchanges, Chunking Rule, CustID to Node Mapping, Customer ID Chunk	Map publish application messages by customer.
BU/Location Node Mapping	IN_CHUNKBULOCATION	Data Exchanges, Chunking Rule, BU/Loc to Node Mapping, BU/Location Node Mapping	Map business units and locations.
BU/Par Location Node Mapping	IN_CHUNKBUPARLOC	Data Exchanges, Chunking Rule, BU/Par to Node Mapping, BU/Par Location Node Mapping	Set up chunking by business unit and par location for publish application messages.
Setup Vendor to Node	PO_CHUNK_VENDOR	Data Exchanges, Chunking Rule, Manage ChunkRule VendorID Map, Setup Vendor to Node	Set up chunking by vendor ID for publish application messages.
PO Chunk Shipto	PO_CHUNK_SHIPTO	Data Exchanges, Chunking Rule, Ship to Loc to Node Mapping, PO Chunk Shipto	Set up chunking by ship to location for publish application messages.
Source Code Chunk	OM_CHUNK_SRC_CD	Data Exchanges, Chunking Rule, Source Code to Node Mapping, Source Code Chunk	Set up chunking by source code for publish application messages.

See Also

PeopleSoft Enterprise Components for CRM 8.9 PeopleBook

Publishing Outbound Messages

This section discusses how to publish outbound messages.

Page Used to Publish Outbound Messages

Page Name	Object Name	Navigation	Usage
Publish Outbound Message	IN_RUN_PUB_MSG	Data Exchanges, Publish Outbound Message	Initiate the outbound message publish process for outbound PeopleSoft CRM messages that use the batch publish design pattern.

Publishing Outbound Messages

Access the Publish Outbound Message page.

Note. This page is used only to publish messages that use the batch publish design pattern.

Select the check box by the name of the message that you want to publish. The system then makes the message name a link to a transaction-specific page for that message. You can publish messages one at a time or in multiples.

APPENDIX B

ISO Country and Currency Codes

PeopleBooks use International Organization for Standardization (ISO) country and currency codes to identify country-specific information and monetary amounts.

This appendix discusses:

- ISO country codes.
- ISO currency codes.

See Also

"About This PeopleBook." Typographical Conventions and Visual Cues

ISO Country Codes

This table lists the ISO country codes that may appear as country identifiers in PeopleBooks:

ISO Country Code	Country Name
ABW	Aruba
AFG	Afghanistan
AGO	Angola
AIA	Anguilla
ALB	Albania
AND	Andorra
ANT	Netherlands Antilles
ARE	United Arab Emirates
ARG	Argentina
ARM	Armenia
ASM	American Samoa
ATA	Antarctica

ISO Country Code	Country Name
ATF	French Southern Territories
ATG	Antigua and Barbuda
AUS	Australia
AUT	Austria
AZE	Azerbaijan
BDI	Burundi
BEL	Belgium
BEN	Benin
BFA	Burkina Faso
BGD	Bangladesh
BGR	Bulgaria
BHR	Bahrain
BHS	Bahamas
BIH	Bosnia and Herzegovina
BLR	Belarus
BLZ	Belize
BMU	Bermuda
BOL	Bolivia
BRA	Brazil
BRB	Barbados
BRN	Brunei Darussalam
BTN	Bhutan
BVT	Bouvet Island
BWA	Botswana
CAF	Central African Republic
CAN	Canada
CCK	Cocos (Keeling) Islands

ISO Country Code	Country Name
CHE	Switzerland
CHL	Chile
CHN	China
CIV	Cote D'Ivoire
CMR	Cameroon
COD	Congo, The Democratic Republic
COG	Congo
COK	Cook Islands
COL	Colombia
COM	Comoros
CPV	Cape Verde
CRI	Costa Rica
CUB	Cuba
CXR	Christmas Island
CYM	Cayman Islands
CYP	Cyprus
CZE	Czech Republic
DEU	Germany
DJI	Djibouti
DMA	Dominica
DNK	Denmark
DOM	Dominican Republic
DZA	Algeria
ECU	Ecuador
EGY	Egypt
ERI	Eritrea
ESH	Western Sahara

ISO Country Code	Country Name
ESP	Spain
EST	Estonia
ETH	Ethiopia
FIN	Finland
FJI	Fiji
FLK	Falkland Islands (Malvinas)
FRA	France
FRO	Faroe Islands
FSM	Micronesia, Federated States
GAB	Gabon
GBR	United Kingdom
GEO	Georgia
GHA	Ghana
GIB	Gibraltar
GIN	Guinea
GLP	Guadeloupe
GMB	Gambia
GNB	Guinea-Bissau
GNQ	Equatorial Guinea
GRC	Greece
GRD	Grenada
GRL	Greenland
GTM	Guatemala
GUF	French Guiana
GUM	Guam
GUY	Guyana
GXA	GXA - GP Core Country

ISO Country Code	Country Name
GXB	GXB - GP Core Country
GXC	GXC - GP Core Country
GXD	GXD - GP Core Country
HKG	Hong Kong
HMD	Heard and McDonald Islands
HND	Honduras
HRV	Croatia
HTI	Haiti
HUN	Hungary
IDN	Indonesia
IND	India
IOT	British Indian Ocean Territory
IRL	Ireland
IRN	Iran (Islamic Republic Of)
IRQ	Iraq
ISL	Iceland
ISR	Israel
ITA	Italy
JAM	Jamaica
JOR	Jordan
JPN	Japan
KAZ	Kazakstan
KEN	Kenya
KGZ	Kyrgyzstan
KHM	Cambodia
KIR	Kiribati
KNA	Saint Kitts and Nevis

ISO Country Code	Country Name
KOR	Korea, Republic of
KWT	Kuwait
LAO	Lao People's Democratic Rep
LBN	Lebanon
LBR	Liberia
LBY	Libyan Arab Jamahiriya
LCA	Saint Lucia
LIE	Liechtenstein
LKA	Sri Lanka
LSO	Lesotho
LTU	Lithuania
LUX	Luxembourg
LVA	Latvia
MAC	Macao
MAR	Morocco
MCO	Monaco
MDA	Moldova, Republic of
MDG	Madagascar
MDV	Maldives
MEX	Mexico
MHL	Marshall Islands
MKD	Fmr Yugoslav Rep of Macedonia
MLI	Mali
MLT	Malta
MMR	Myanmar
MNG	Mongolia
MNP	Northern Mariana Islands

ISO Country Code	Country Name
MOZ	Mozambique
MRT	Mauritania
MSR	Montserrat
MTQ	Martinique
MUS	Mauritius
MWI	Malawi
MYS	Malaysia
MYT	Mayotte
NAM	Namibia
NCL	New Caledonia
NER	Niger
NFK	Norfolk Island
NGA	Nigeria
NIC	Nicaragua
NIU	Niue
NLD	Netherlands
NOR	Norway
NPL	Nepal
NRU	Nauru
NZL	New Zealand
OMN	Oman
PAK	Pakistan
PAN	Panama
PCN	Pitcairn
PER	Peru
PHL	Philippines
PLW	Palau

ISO Country Code	Country Name
PNG	Papua New Guinea
POL	Poland
PRI	Puerto Rico
PRK	Korea, Democratic People's Rep
PRT	Portugal
PRY	Paraguay
PSE	Palestinian Territory, Occupie
PYF	French Polynesia
QAT	Qatar
REU	Reunion
ROU	Romania
RUS	Russian Federation
RWA	Rwanda
SAU	Saudi Arabia
SDN	Sudan
SEN	Senegal
SGP	Singapore
SGS	Sth Georgia & Sth Sandwich Is
SHN	Saint Helena
SJM	Svalbard and Jan Mayen
SLB	Solomon Islands
SLE	Sierra Leone
SLV	El Salvador
SMR	San Marino
SOM	Somalia
SPM	Saint Pierre and Miquelon
STP	Sao Tome and Principe

ISO Country Code	Country Name
SUR	Suriname
SVK	Slovakia
SVN	Slovenia
SWE	Sweden
SWZ	Swaziland
SYC	Seychelles
SYR	Syrian Arab Republic
TCA	Turks and Caicos Islands
TCD	Chad
TGO	Togo
THA	Thailand
TJK	Tajikistan
TKL	Tokelau
TKM	Turkmenistan
TLS	East Timor
TON	Tonga
TTO	Trinidad and Tobago
TUN	Tunisia
TUR	Turkey
TUV	Tuvalu
TWN	Taiwan, Province of China
TZA	Tanzania, United Republic of
UGA	Uganda
UKR	Ukraine
UMI	US Minor Outlying Islands
URY	Uruguay
USA	United States

ISO Country Code	Country Name
UZB	Uzbekistan
VAT	Holy See (Vatican City State)
VCT	St Vincent and the Grenadines
VEN	Venezuela
VGB	Virgin Islands (British)
VIR	Virgin Islands (U.S.)
VNM	Viet Nam
VUT	Vanuatu
WLF	Wallis and Futuna Islands
WSM	Samoa
YEM	Yemen
YUG	Yugoslavia
ZAF	South Africa
ZMB	Zambia
ZWE	Zimbabwe

ISO Currency Codes

This table lists the ISO country codes that may appear as currency identifiers in PeopleBooks:

ISO Currency Code	Description
ADP	Andorran Peseta
AED	United Arab Emirates Dirham
AFA	Afghani
AFN	Afghani
ALK	Old Lek
ALL	Lek
AMD	Armenian Dram

ISO Currency Code	Description
ANG	Netherlands Antilles Guilder
AOA	Kwanza
AOK	Kwanza
AON	New Kwanza
AOR	Kwanza Reajustado
ARA	Austral
ARP	Peso Argentino
ARS	Argentine Peso
ARY	Peso
ATS	Schilling
AUD	Australian Dollar
AWG	Aruban Guilder
AZM	Azerbaijani Manat
BAD	Dinar
BAM	Convertible Marks
BBD	Barbados Dollar
BDT	Taka
BEC	Convertible Franc
BEF	Belgian Franc
BEL	Financial Belgian Franc
BGJ	Lev A/52
BGK	Lev A/62
BGL	Lev
BGN	Bulgarian LEV
BHD	Bahraini Dinar
BIF	Burundi Franc
BMD	Bermudian Dollar

ISO Currency Code	Description
BND	Brunei Dollar
BOB	Boliviano
BOP	Peso
BOV	Mvdol
BRB	Cruzeiro
BRC	Cruzado
BRE	Cruzeiro
BRL	Brazilian Real
BRN	New Cruzado
BRR	Brazilian Real Dollar
BSD	Bahamian Dollar
BTN	Ngultrum
BUK	N/A
BWP	Pula
BYB	Belarussian Ruble
BYR	Belarussian Ruble
BZD	Belize Dollar
CAD	Canadian Dollar
CDF	Franc Congolais
CHF	Swiss Franc
CLF	Unidades de fomento
CLP	Chilean Peso
CNX	Peoples Bank Dollar
CNY	Yuan Renminbi
COP	Colombian Peso
CRC	Costa Rican Colon
CSD	Serbia Dinar

ISO Currency Code	Description
CSJ	Krona A/53
CSK	Koruna
CUP	Cuban Peso
CVE	Cape Verde Escudo
CYP	Cyprus Pound
CZK	Czech Koruna
DEM	Deutsche Mark
DJF	Djibouti Franc
DKK	Danish Krone
DOP	Dominican Peso
DZD	Algerian Dinar
ECS	Sucre
ECV	Unidad de Valor
EEK	Kroon
EGP	Egyptian Pound
EQE	Ekwele
ERN	Nakfa
ESA	Spanish Peseta
ESB	Convertible Peseta
ESP	Spanish Peseta
ETB	Ethiopian Birr
EUR	euro
FIM	Markka
FJD	Fiji Dollar
FKP	Falklands Isl. Pound
FRF	French Franc
GBP	Pound Sterling

ISO Currency Code	Description
GEK	Georgian Coupon
GEL	Lari
GHC	Cedi
GIP	Gibraltar Pound
GMD	Dalasi
GNE	Syli
GNF	Guinea Franc
GNS	Syli
GQE	Ekwele
GRD	Drachma
GTQ	Quetzal
GWE	Guinea Escudo
GWP	Guinea-Bissau Peso
GYD	Guyana Dollar
HKD	Hong Kong Dollar
HNL	Lempira
HRD	Dinar
HRK	Kuna
HTG	Gourde
HUF	Forint
IDR	Rupiah
IEP	Irish Pound
ILP	Pound
ILR	Old Shekel
ILS	New Israeli Sheqel
INR	Indian Rupee
IQD	Iraqi Dinar

ISO Currency Code	Description
IRR	Iranian Rial
ISJ	Old Krona
ISK	Iceland Krona
ITL	Italian Lira
JMD	Jamaican Dollar
JOD	Jordanian Dinar
JPY	Yen
KES	Kenyan Shilling
KGS	Som
KHR	Riel
KMF	Comoro Franc
KPW	North Korean Won
KRW	Won
KWD	Kuwaiti Dinar
KYD	Cayman Islands dollar
KZT	Tenge
LAJ	Kip Pot Pol
LAK	Kip
LBP	Lebanese Pound
LKR	Sri Lanka Rupee
LRD	Liberian Dollar
LSL	Loti
LSM	Maloti
LTL	Lithuanian Litas
LTT	Talonas
LUC	Convertib Franc
LUF	Luxembourg Franc

ISO Currency Code	Description
LUL	Financial Franc
LVL	Latvian Lats
LVR	Latvian Ruble
LYD	Libyan Dinar
MAD	Moroccan Dirham
MAF	Mali Franc
MDL	Moldovan Leu
MGF	Malagasy Franc
MKD	Denar
MLF	Mali Franc
MMK	Kyat
MNT	Tugrik
MOP	Pataca
MRO	Ouguiya
MTL	Maltese Lira
MTP	Maltese Pound
MUR	Mauritius Rupee
MVQ	Maldiva Rupee
MVR	Rufiyaa
MWK	Malawian Kwacha
MXN	Mexican Peso
MXP	Mexican Peso
MXV	Mexican UDI
MYR	Malaysian Ringgit
MZE	Mozambique Escudo
MZM	Metical
NAD	Namibia Dollar

ISO Currency Code	Description
NGN	Naira
NIC	Cordoba
NIO	Cordoba Oro
NLG	Netherlands Guilder
NOK	Norwegian Krone
NPR	Nepalese Rupee
NZD	New Zealand Dollar
OMR	Rial Omani
PAB	Balboa
PEI	Inti
PEN	Nuevo Sol
PES	Sol
PGK	Kina
PHP	Philippine Peso
PKR	Pakistan Rupee
PLN	Zloty
PLZ	Zloty
PTE	Portuguese Escudo
PYG	Guarani
QAR	Qatari Rial
ROK	Leu A/52
ROL	Leu
RUB	Russian Ruble
RUR	Russian Federation Rouble
RWF	Rwanda Franc
SAR	Saudi Riyal
SBD	Solomon Islands

ISO Currency Code	Description
SCR	Seychelles Rupee
SDD	Sudanese Dinar
SDP	Sudanese Pound
SEK	Swedish Krona
SGD	Singapore Dollar
SHP	St Helena Pound
SIT	Tolar
SKK	Slovak Koruna
SLL	Leone
SOS	Somali Shilling
SRG	Surinam Guilder
STD	Dobra
SUR	Rouble
SVC	El Salvador Colon
SYP	Syrian Pound
SZL	Lilangeni
THB	Baht
TJR	Tajik Ruble
TJS	Somoni
TMM	Manat
TND	Tunisian Dinar
TOP	Pa'anga
TPE	Timor Escudo
TRL	Turkish Lira
TTD	Trinidad Dollar
TWD	New Taiwan Dollar
TZS	Tanzanian Shilling

ISO Currency Code	Description
UAH	Hryvnia
UAK	Karbovanet
UGS	Uganda Shilling
UGW	Old Shilling
UGX	Uganda Shilling
USD	US Dollar
USN	US Dollar (Next day)
USS	US Dollar (Same day)
UYN	Old Uruguay Peso
UYP	Uruguayan Peso
UYU	Peso Uruguayo
UZS	Uzbekistan Sum
VEB	Bolivar
VNC	Old Dong
VND	Dong
VUV	Vatu
WST	Tala
XAF	CFA Franc BEAC
XAG	Silver
XAU	GOLD
XBA	European Composite Unit
XBB	European Monetary Unit
XBC	European Unit of Account 9
XBD	European Unit of Account 17
XCD	East Caribbean Dollar
XDR	SDR
XEU	EU Currency (E.C.U)

ISO Currency Code	Description
XFO	Gold-Franc
XFU	UIC-Franc
XOF	CFA Franc BCEAO
XPD	Palladium
XPF	CFP Franc
XPT	Platinum
XTS	For Testing Purposes
XXX	Non Currency Transaction
YDD	Yemeni Din
YER	Yemeni Rial
YUD	New Yugoslavian Dinar
YUM	New Dinar
YUN	Yugoslavian Dinar
ZAL	Financial Rand
ZAR	Rand
ZMK	Zambian Kwacha
ZRN	New Zaire
ZRZ	Zaire
ZWC	Rhodesian Dollar
ZWD	Zimbabwe Dollar

Glossary of PeopleSoft Terms

absence entitlement	This element defines rules for granting paid time off for valid absences, such as sick time, vacation, and maternity leave. An absence entitlement element defines the entitlement amount, frequency, and entitlement period.
absence take	This element defines the conditions that must be met before a payee is entitled to take paid time off.
accounting class	In PeopleSoft Enterprise Performance Management, the accounting class defines how a resource is treated for generally accepted accounting practices. The Inventory class indicates whether a resource becomes part of a balance sheet account, such as inventory or fixed assets, while the Non-inventory class indicates that the resource is treated as an expense of the period during which it occurs.
accounting date	The accounting date indicates when a transaction is recognized, as opposed to the date the transaction actually occurred. The accounting date and transaction date can be the same. The accounting date determines the period in the general ledger to which the transaction is to be posted. You can only select an accounting date that falls within an open period in the ledger to which you are posting. The accounting date for an item is normally the invoice date.
accounting split	The accounting split method indicates how expenses are allocated or divided among one or more sets of accounting ChartFields.
accumulator	You use an accumulator to store cumulative values of defined items as they are processed. You can accumulate a single value over time or multiple values over time. For example, an accumulator could consist of all voluntary deductions, or all company deductions, enabling you to accumulate amounts. It allows total flexibility for time periods and values accumulated.
action reason	The reason an employee's job or employment information is updated. The action reason is entered in two parts: a personnel action, such as a promotion, termination, or change from one pay group to another—and a reason for that action. Action reasons are used by PeopleSoft Human Resources, PeopleSoft Benefits Administration, PeopleSoft Stock Administration, and the COBRA Administration feature of the Base Benefits business process.
action template	In PeopleSoft Receivables, outlines a set of escalating actions that the system or user performs based on the period of time that a customer or item has been in an action plan for a specific condition.
activity	<p>In PeopleSoft Enterprise Learning Management, an instance of a catalog item (sometimes called a class) that is available for enrollment. The activity defines such things as the costs that are associated with the offering, enrollment limits and deadlines, and waitlisting capacities.</p> <p>In PeopleSoft Enterprise Performance Management, the work of an organization and the aggregation of actions that are used for activity-based costing.</p> <p>In PeopleSoft Project Costing, the unit of work that provides a further breakdown of projects—usually into specific tasks.</p> <p>In PeopleSoft Workflow, a specific transaction that you might need to perform in a business process. Because it consists of the steps that are used to perform a transaction, it is also known as a step map.</p>

agreement	In PeopleSoft eSettlements, provides a way to group and specify processing options, such as payment terms, pay from a bank, and notifications by a buyer and supplier location combination.
allocation rule	In PeopleSoft Enterprise Incentive Management, an expression within compensation plans that enables the system to assign transactions to nodes and participants. During transaction allocation, the allocation engine traverses the compensation structure from the current node to the root node, checking each node for plans that contain allocation rules.
alternate account	A feature in PeopleSoft General Ledger that enables you to create a statutory chart of accounts and enter statutory account transactions at the detail transaction level, as required for recording and reporting by some national governments.
AR specialist	Abbreviation for <i>receivables specialist</i> . In PeopleSoft Receivables, an individual in who tracks and resolves deductions and disputed items.
arbitration plan	In PeopleSoft Enterprise Pricer, defines how price rules are to be applied to the base price when the transaction is priced.
assessment rule	In PeopleSoft Receivables, a user-defined rule that the system uses to evaluate the condition of a customer's account or of individual items to determine whether to generate a follow-up action.
asset class	An asset group used for reporting purposes. It can be used in conjunction with the asset category to refine asset classification.
attribute/value pair	In PeopleSoft Directory Interface, relates the data that makes up an entry in the directory information tree.
authentication server	A server that is set up to verify users of the system.
base time period	In PeopleSoft Business Planning, the lowest level time period in a calendar.
benchmark job	In PeopleSoft Workforce Analytics, a benchmark job is a job code for which there is corresponding salary survey data from published, third-party sources.
book	In PeopleSoft Asset Management, used for storing financial and tax information, such as costs, depreciation attributes, and retirement information on assets.
branch	A tree node that rolls up to nodes above it in the hierarchy, as defined in PeopleSoft Tree Manager.
budgetary account only	An account used by the system only and not by users; this type of account does not accept transactions. You can only budget with this account. Formerly called "system-maintained account."
budget check	In commitment control, the processing of source transactions against control budget ledgers, to see if they pass, fail, or pass with a warning.
budget control	In commitment control, budget control ensures that commitments and expenditures don't exceed budgets. It enables you to track transactions against corresponding budgets and terminate a document's cycle if the defined budget conditions are not met. For example, you can prevent a purchase order from being dispatched to a vendor if there are insufficient funds in the related budget to support it.
budget period	The interval of time (such as 12 months or 4 quarters) into which a period is divided for budgetary and reporting purposes. The ChartField allows maximum flexibility to define operational accounting time periods without restriction to only one calendar.
business event	In PeopleSoft Receivables, defines the processing characteristics for the Receivable Update process for a draft activity.

	In PeopleSoft Sales Incentive Management, an original business transaction or activity that may justify the creation of a PeopleSoft Enterprise Incentive Management event (a sale, for example).
business unit	A corporation or a subset of a corporation that is independent with regard to one or more operational or accounting functions.
buyer	In PeopleSoft eSettlements, an organization (or business unit, as opposed to an individual) that transacts with suppliers (vendors) within the system. A buyer creates payments for purchases that are made in the system.
catalog item	In PeopleSoft Enterprise Learning Management, a specific topic that a learner can study and have tracked. For example, "Introduction to Microsoft Word." A catalog item contains general information about the topic and includes a course code, description, categorization, keywords, and delivery methods. A catalog item can have one or more learning activities.
catalog map	In PeopleSoft Catalog Management, translates values from the catalog source data to the format of the company's catalog.
catalog partner	In PeopleSoft Catalog Management, shares responsibility with the enterprise catalog manager for maintaining catalog content.
categorization	Associates partner offerings with catalog offerings and groups them into enterprise catalog categories.
channel	In PeopleSoft MultiChannel Framework, email, chat, voice (computer telephone integration [CTI]), or a generic event.
ChartField	A field that stores a chart of accounts, resources, and so on, depending on the PeopleSoft application. ChartField values represent individual account numbers, department codes, and so forth.
ChartField balancing	You can require specific ChartFields to match up (balance) on the debit and the credit side of a transaction.
ChartField combination edit	The process of editing journal lines for valid ChartField combinations based on user-defined rules.
ChartKey	One or more fields that uniquely identify each row in a table. Some tables contain only one field as the key, while others require a combination.
checkbook	In PeopleSoft Promotions Management, enables you to view financial data (such as planned, incurred, and actual amounts) that is related to funds and trade promotions.
Class ChartField	A ChartField value that identifies a unique appropriation budget key when you combine it with a fund, department ID, and program code, as well as a budget period. Formerly called <i>sub-classification</i> .
clone	In PeopleCode, to make a unique copy. In contrast, to <i>copy</i> may mean making a new reference to an object, so if the underlying object is changed, both the copy and the original change.
collection	To make a set of documents available for searching in Verity, you must first create at least one collection. A collection is set of directories and files that allow search application users to use the Verity search engine to quickly find and display source documents that match search criteria. A collection is a set of statistics and pointers to the source documents, stored in a proprietary format on a file server. Because a collection can only store information for a single location, PeopleSoft maintains a set of collections (one per language code) for each search index object.

collection rule	In PeopleSoft Receivables, a user-defined rule that defines actions to take for a customer based on both the amount and the number of days past due for outstanding balances.
compensation object	In PeopleSoft Enterprise Incentive Management, a node within a compensation structure. Compensation objects are the building blocks that make up a compensation structure's hierarchical representation.
compensation structure	In PeopleSoft Enterprise Incentive Management, a hierarchical relationship of compensation objects that represents the compensation-related relationship between the objects.
condition	In PeopleSoft Receivables, occurs when there is a change of status for a customer's account, such as reaching a credit limit or exceeding a user-defined balance due.
configuration parameter catalog	Used to configure an external system with PeopleSoft. For example, a configuration parameter catalog might set up configuration and communication parameters for an external server.
configuration plan	In PeopleSoft Enterprise Incentive Management, configuration plans hold allocation information for common variables (not incentive rules) and are attached to a node without a participant. Configuration plans are not processed by transactions.
content reference	Content references are pointers to content registered in the portal registry. These are typically either URLs or iScripts. Content references fall into three categories: target content, templates, and template pagelets.
context	<p>In PeopleCode, determines which buffer fields can be contextually referenced and which is the current row of data on each scroll level when a PeopleCode program is running.</p> <p>In PeopleSoft Enterprise Incentive Management, a mechanism that is used to determine the scope of a processing run. PeopleSoft Enterprise Incentive Management uses three types of context: plan, period, and run-level.</p>
control table	Stores information that controls the processing of an application. This type of processing might be consistent throughout an organization, or it might be used only by portions of the organization for more limited sharing of data.
cost profile	A combination of a receipt cost method, a cost flow, and a deplete cost method. A profile is associated with a cost book and determines how items in that book are valued, as well as how the material movement of the item is valued for the book.
cost row	A cost transaction and amount for a set of ChartFields.
current learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's in-progress learning activities and programs.
data acquisition	In PeopleSoft Enterprise Incentive Management, the process during which raw business transactions are acquired from external source systems and fed into the operational data store (ODS).
data elements	<p>Data elements, at their simplest level, define a subset of data and the rules by which to group them.</p> <p>For Workforce Analytics, data elements are rules that tell the system what measures to retrieve about your workforce groups.</p>
dataset	A data grouping that enables role-based filtering and distribution of data. You can limit the range and quantity of data that is displayed for a user by associating dataset rules with user roles. The result of dataset rules is a set of data that is appropriate for the user's roles.

delivery method	<p>In PeopleSoft Enterprise Learning Management, identifies the primary type of delivery method in which a particular learning activity is offered. Also provides default values for the learning activity, such as cost and language. This is primarily used to help learners search the catalog for the type of delivery from which they learn best. Because PeopleSoft Enterprise Learning Management is a blended learning system, it does not enforce the delivery method.</p> <p>In PeopleSoft Supply Chain Management, identifies the method by which goods are shipped to their destinations (such as truck, air, rail, and so on). The delivery method is specified when creating shipment schedules.</p>
delivery method type	In PeopleSoft Enterprise Learning Management, identifies how learning activities can be delivered—for example, through online learning, classroom instruction, seminars, books, and so forth—in an organization. The type determines whether the delivery method includes scheduled components.
directory information tree	In PeopleSoft Directory Interface, the representation of a directory's hierarchical structure.
document sequencing	A flexible method that sequentially numbers the financial transactions (for example, bills, purchase orders, invoices, and payments) in the system for statutory reporting and for tracking commercial transaction activity.
dynamic detail tree	A tree that takes its detail values—dynamic details—directly from a table in the database, rather than from a range of values that are entered by the user.
edit table	A table in the database that has its own record definition, such as the Department table. As fields are entered into a PeopleSoft application, they can be validated against an edit table to ensure data integrity throughout the system.
effective date	A method of dating information in PeopleSoft applications. You can predate information to add historical data to your system, or postdate information in order to enter it before it actually goes into effect. By using effective dates, you don't delete values; you enter a new value with a current effective date.
EIM ledger	Abbreviation for <i>Enterprise Incentive Management ledger</i> . In PeopleSoft Enterprise Incentive Management, an object to handle incremental result gathering within the scope of a participant. The ledger captures a result set with all of the appropriate traces to the data origin and to the processing steps of which it is a result.
elimination set	In PeopleSoft General Ledger, a related group of intercompany accounts that is processed during consolidations.
entry event	In PeopleSoft General Ledger, Receivables, Payables, Purchasing, and Billing, a business process that generates multiple debits and credits resulting from single transactions to produce standard, supplemental accounting entries.
equitization	In PeopleSoft General Ledger, a business process that enables parent companies to calculate the net income of subsidiaries on a monthly basis and adjust that amount to increase the investment amount and equity income amount before performing consolidations.
event	<p>A predefined point either in the Component Processor flow or in the program flow. As each point is encountered, the event activates each component, triggering any PeopleCode program that is associated with that component and that event. Examples of events are FieldChange, SavePreChange, and RowDelete.</p> <p>In PeopleSoft Human Resources, also refers to an incident that affects benefits eligibility.</p>
event propagation process	In PeopleSoft Sales Incentive Management, a process that determines, through logic, the propagation of an original PeopleSoft Enterprise Incentive Management event and creates a derivative (duplicate) of the original event to be processed by other objects.

	Sales Incentive Management uses this mechanism to implement splits, roll-ups, and so on. Event propagation determines who receives the credit.
exception	In PeopleSoft Receivables, an item that either is a deduction or is in dispute.
exclusive pricing	In PeopleSoft Order Management, a type of arbitration plan that is associated with a price rule. Exclusive pricing is used to price sales order transactions.
fact	In PeopleSoft applications, facts are numeric data values from fields from a source database as well as an analytic application. A fact can be anything you want to measure your business by, for example, revenue, actual, budget data, or sales numbers. A fact is stored on a fact table.
forecast item	A logical entity with a unique set of descriptive demand and forecast data that is used as the basis to forecast demand. You create forecast items for a wide range of uses, but they ultimately represent things that you buy, sell, or use in your organization and for which you require a predictable usage.
fund	In PeopleSoft Promotions Management, a budget that can be used to fund promotional activity. There are four funding methods: top down, fixed accrual, rolling accrual, and zero-based accrual.
generic process type	In PeopleSoft Process Scheduler, process types are identified by a generic process type. For example, the generic process type SQR includes all SQR process types, such as SQR process and SQR report.
group	In PeopleSoft Billing and Receivables, a posting entity that comprises one or more transactions (items, deposits, payments, transfers, matches, or write-offs). In PeopleSoft Human Resources Management and Supply Chain Management, any set of records that are associated under a single name or variable to run calculations in PeopleSoft business processes. In PeopleSoft Time and Labor, for example, employees are placed in groups for time reporting purposes.
incentive object	In PeopleSoft Enterprise Incentive Management, the incentive-related objects that define and support the PeopleSoft Enterprise Incentive Management calculation process and results, such as plan templates, plans, results data, user interaction objects, and so on.
incentive rule	In PeopleSoft Sales Incentive Management, the commands that act on transactions and turn them into compensation. A rule is one part in the process of turning a transaction into compensation.
incur	In PeopleSoft Promotions Management, to become liable for a promotional payment. In other words, you owe that amount to a customer for promotional activities.
item	In PeopleSoft Inventory, a tangible commodity that is stored in a business unit (shipped from a warehouse). In PeopleSoft Demand Planning, Inventory Policy Planning, and Supply Planning, a noninventory item that is designated as being used for planning purposes only. It can represent a family or group of inventory items. It can have a planning bill of material (BOM) or planning routing, and it can exist as a component on a planning BOM. A planning item cannot be specified on a production or engineering BOM or routing, and it cannot be used as a component in a production. The quantity on hand will never be maintained.
KPI	In PeopleSoft Receivables, an individual receivable. An item can be an invoice, a credit memo, a debit memo, a write-off, or an adjustment. An abbreviation for <i>key performance indicator</i> . A high-level measurement of how well an organization is doing in achieving critical success factors. This defines the data value or calculation upon which an assessment is determined.

LDIF file	Abbreviation for <i>Lightweight Directory Access Protocol (LDAP) Data Interchange Format file</i> . Contains discrepancies between PeopleSoft data and directory data.
learner group	In PeopleSoft Enterprise Learning Management, a group of learners who are linked to the same learning environment. Members of the learner group can share the same attributes, such as the same department or job code. Learner groups are used to control access to and enrollment in learning activities and programs. They are also used to perform group enrollments and mass enrollments in the back office.
learning components	In PeopleSoft Enterprise Learning Management, the foundational building blocks of learning activities. PeopleSoft Enterprise Learning Management supports six basic types of learning components: web-based, session, webcast, test, survey, and assignment. One or more of these learning component types compose a single learning activity.
learning environment	In PeopleSoft Enterprise Learning Management, identifies a set of categories and catalog items that can be made available to learner groups. Also defines the default values that are assigned to the learning activities and programs that are created within a particular learning environment. Learning environments provide a way to partition the catalog so that learners see only those items that are relevant to them.
learning history	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's completed learning activities and programs.
ledger mapping	You use ledger mapping to relate expense data from general ledger accounts to resource objects. Multiple ledger line items can be mapped to one or more resource IDs. You can also use ledger mapping to map dollar amounts (referred to as <i>rates</i>) to business units. You can map the amounts in two different ways: an actual amount that represents actual costs of the accounting period, or a budgeted amount that can be used to calculate the capacity rates as well as budgeted model results. In PeopleSoft Enterprise Warehouse, you can map general ledger accounts to the EW Ledger table.
library section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan (or template) and that is available for other plans to share. Changes to a library section are reflected in all plans that use it.
linked section	In PeopleSoft Enterprise Incentive Management, a section that is defined in a plan template but appears in a plan. Changes to linked sections propagate to plans using that section.
linked variable	In PeopleSoft Enterprise Incentive Management, a variable that is defined and maintained in a plan template and that also appears in a plan. Changes to linked variables propagate to plans using that variable.
load	In PeopleSoft Inventory, identifies a group of goods that are shipped together. Load management is a feature of PeopleSoft Inventory that is used to track the weight, the volume, and the destination of a shipment.
local functionality	In PeopleSoft HRMS, the set of information that is available for a specific country. You can access this information when you click the appropriate country flag in the global window, or when you access it by a local country menu.
location	Locations enable you to indicate the different types of addresses—for a company, for example, one address to receive bills, another for shipping, a third for postal deliveries, and a separate street address. Each address has a different location number. The primary location—indicated by a <i>1</i> —is the address you use most often and may be different from the main address.
logistical task	In PeopleSoft Services Procurement, an administrative task that is related to hiring a service provider. Logistical tasks are linked to the service type on the work order so that different types of services can have different logistical tasks. Logistical tasks include both preapproval tasks (such as assigning a new badge or ordering a new

	laptop) and postapproval tasks (such as scheduling orientation or setting up the service provider email). The logistical tasks can be mandatory or optional. Mandatory preapproval tasks must be completed before the work order is approved. Mandatory postapproval tasks, on the other hand, must be completed before a work order is released to a service provider.
market template	In PeopleSoft Enterprise Incentive Management, additional functionality that is specific to a given market or industry and is built on top of a product category.
match group	In PeopleSoft Receivables, a group of receivables items and matching offset items. The system creates match groups by using user-defined matching criteria for selected field values.
MCF server	Abbreviation for <i>PeopleSoft MultiChannel Framework server</i> . Comprises the universal queue server and the MCF log server. Both processes are started when <i>MCF Servers</i> is selected in an application server domain configuration.
merchandising activity	In PeopleSoft Promotions Management, a specific discount type that is associated with a trade promotion (such as off-invoice, billback or rebate, or lump-sum payment) that defines the performance that is required to receive the discount. In the industry, you may know this as an offer, a discount, a merchandising event, an event, or a tactic.
meta-SQL	Meta-SQL constructs expand into platform-specific Structured Query Language (SQL) substrings. They are used in functions that pass SQL strings, such as in SQL objects, the SQLExec function, and PeopleSoft Application Engine programs.
metastring	Metastings are special expressions included in SQL string literals. The metastings, prefixed with a percent (%) symbol, are included directly in the string literals. They expand at run time into an appropriate substring for the current database platform.
multibook	In PeopleSoft General Ledger, multiple ledgers having multiple-base currencies that are defined for a business unit, with the option to post a single transaction to all base currencies (all ledgers) or to only one of those base currencies (ledgers).
multicurrency	The ability to process transactions in a currency other than the business unit's base currency.
national allowance	In PeopleSoft Promotions Management, a promotion at the corporate level that is funded by nondiscretionary dollars. In the industry, you may know this as a national promotion, a corporate promotion, or a corporate discount.
node-oriented tree	A tree that is based on a detail structure, but the detail values are not used.
pagelet	Each block of content on the home page is called a pagelet. These pagelets display summary information within a small rectangular area on the page. The pagelet provide users with a snapshot of their most relevant PeopleSoft and non-PeopleSoft content.
participant	In PeopleSoft Enterprise Incentive Management, participants are recipients of the incentive compensation calculation process.
participant object	Each participant object may be related to one or more compensation objects. See also <i>compensation object</i> .
partner	A company that supplies products or services that are resold or purchased by the enterprise.
pay cycle	In PeopleSoft Payables, a set of rules that define the criteria by which it should select scheduled payments for payment creation.
pending item	In PeopleSoft Receivables, an individual receivable (such as an invoice, a credit memo, or a write-off) that has been entered in or created by the system, but hasn't been posted.

PeopleCode	PeopleCode is a proprietary language, executed by the PeopleSoft application processor. PeopleCode generates results based upon existing data or user actions. By using business interlink objects, external services are available to all PeopleSoft applications wherever PeopleCode can be executed.
PeopleCode event	An action that a user takes upon an object, usually a record field, that is referenced within a PeopleSoft page.
PeopleSoft Internet Architecture	The fundamental architecture on which PeopleSoft 8 applications are constructed, consisting of a relational database management system (RDBMS), an application server, a web server, and a browser.
performance measurement	In PeopleSoft Enterprise Incentive Management, a variable used to store data (similar to an aggregator, but without a predefined formula) within the scope of an incentive plan. Performance measures are associated with a plan calendar, territory, and participant. Performance measurements are used for quota calculation and reporting.
period context	In PeopleSoft Enterprise Incentive Management, because a participant typically uses the same compensation plan for multiple periods, the period context associates a plan context with a specific calendar period and fiscal year. The period context references the associated plan context, thus forming a chain. Each plan context has a corresponding set of period contexts.
plan	In PeopleSoft Sales Incentive Management, a collection of allocation rules, variables, steps, sections, and incentive rules that instruct the PeopleSoft Enterprise Incentive Management engine in how to process transactions.
plan context	In PeopleSoft Enterprise Incentive Management, correlates a participant with the compensation plan and node to which the participant is assigned, enabling the PeopleSoft Enterprise Incentive Management system to find anything that is associated with the node and that is required to perform compensation processing. Each participant, node, and plan combination represents a unique plan context—if three participants are on a compensation structure, each has a different plan context. Configuration plans are identified by plan contexts and are associated with the participants that refer to them.
plan template	In PeopleSoft Enterprise Incentive Management, the base from which a plan is created. A plan template contains common sections and variables that are inherited by all plans that are created from the template. A template may contain steps and sections that are not visible in the plan definition.
planned learning	In PeopleSoft Enterprise Learning Management, a self-service repository for all of a learner's planned learning activities and programs.
planning instance	In PeopleSoft Supply Planning, a set of data (business units, items, supplies, and demands) constituting the inputs and outputs of a supply plan.
portal registry	In PeopleSoft applications, the portal registry is a tree-like structure in which content references are organized, classified, and registered. It is a central repository that defines both the structure and content of a portal through a hierarchical, tree-like structure of folders useful for organizing and securing content references.
price list	In PeopleSoft Enterprise Pricer, enables you to select products and conditions for which the price list applies to a transaction. During a transaction, the system either determines the product price based on the predefined search hierarchy for the transaction or uses the product's lowest price on any associated, active price lists. This price is used as the basis for any further discounts and surcharges.
price rule	In PeopleSoft Enterprise Pricer, defines the conditions that must be met for adjustments to be applied to the base price. Multiple rules can apply when conditions of each rule are met.

price rule condition	In PeopleSoft Enterprise Pricer, selects the price-by fields, the values for the price-by fields, and the operator that determines how the price-by fields are related to the transaction.
price rule key	In PeopleSoft Enterprise Pricer, defines the fields that are available to define price rule conditions (which are used to match a transaction) on the price rule.
process category	In PeopleSoft Process Scheduler, processes that are grouped for server load balancing and prioritization.
process group	In PeopleSoft Financials, a group of application processes (performed in a defined order) that users can initiate in real time, directly from a transaction entry page.
process definition	Process definitions define each run request.
process instance	A unique number that identifies each process request. This value is automatically incremented and assigned to each requested process when the process is submitted to run.
process job	You can link process definitions into a job request and process each request serially or in parallel. You can also initiate subsequent processes based on the return code from each prior request.
process request	A single run request, such as a Structured Query Report (SQR), a COBOL or Application Engine program, or a Crystal report that you run through PeopleSoft Process Scheduler.
process run control	A PeopleTools variable used to retain PeopleSoft Process Scheduler values needed at runtime for all requests that reference a run control ID. Do not confuse these with application run controls, which may be defined with the same run control ID, but only contain information specific to a given application process request.
product category	In PeopleSoft Enterprise Incentive Management, indicates an application in the Enterprise Incentive Management suite of products. Each transaction in the PeopleSoft Enterprise Incentive Management system is associated with a product category.
programs	In PeopleSoft Enterprise Learning Management, a high-level grouping that guides the learner along a specific learning path through sections of catalog items. PeopleSoft Enterprise Learning Systems provides two types of programs—curricula and certifications.
progress log	In PeopleSoft Services Procurement, tracks deliverable-based projects. This is similar to the time sheet in function and process. The service provider contact uses the progress log to record and submit progress on deliverables. The progress can be logged by the activity that is performed, by the percentage of work that is completed, or by the completion of milestone activities that are defined for the project.
project transaction	In PeopleSoft Project Costing, an individual transaction line that represents a cost, time, budget, or other transaction row.
promotion	In PeopleSoft Promotions Management, a trade promotion, which is typically funded from trade dollars and used by consumer products manufacturers to increase sales volume.
publishing	In PeopleSoft Enterprise Incentive Management, a stage in processing that makes incentive-related results available to participants.
record group	A set of logically and functionally related control tables and views. Record groups help enable TableSet sharing, which eliminates redundant data entry. Record groups ensure that TableSet sharing is applied consistently across all related tables and views.
record input VAT flag	Abbreviation for <i>record input value-added tax flag</i> . Within PeopleSoft Purchasing, Payables, and General Ledger, this flag indicates that you are recording input VAT

	<p>on the transaction. This flag, in conjunction with the record output VAT flag, is used to determine the accounting entries created for a transaction and to determine how a transaction is reported on the VAT return. For all cases within Purchasing and Payables where VAT information is tracked on a transaction, this flag is set to Yes. This flag is not used in PeopleSoft Order Management, Billing, or Receivables, where it is assumed that you are always recording only output VAT, or in PeopleSoft Expenses, where it is assumed that you are always recording only input VAT.</p>
record output VAT flag	<p>Abbreviation for <i>record output value-added tax flag</i>.</p> <p>See <i>record input VAT flag</i>.</p>
reference data	In PeopleSoft Sales Incentive Management, system objects that represent the sales organization, such as territories, participants, products, customers, channels, and so on.
reference object	In PeopleSoft Enterprise Incentive Management, this dimension-type object further defines the business. Reference objects can have their own hierarchy (for example, product tree, customer tree, industry tree, and geography tree).
reference transaction	In commitment control, a reference transaction is a source transaction that is referenced by a higher-level (and usually later) source transaction, in order to automatically reverse all or part of the referenced transaction's budget-checked amount. This avoids duplicate postings during the sequential entry of the transaction at different commitment levels. For example, the amount of an encumbrance transaction (such as a purchase order) will, when checked and recorded against a budget, cause the system to concurrently reference and relieve all or part of the amount of a corresponding pre-encumbrance transaction, such as a purchase requisition.
regional sourcing	In PeopleSoft Purchasing, provides the infrastructure to maintain, display, and select an appropriate vendor and vendor pricing structure that is based on a regional sourcing model where the multiple ship to locations are grouped. Sourcing may occur at a level higher than the ship to location.
relationship object	In PeopleSoft Enterprise Incentive Management, these objects further define a compensation structure to resolve transactions by establishing associations between compensation objects and business objects.
remote data source data	Data that is extracted from a separate database and migrated into the local database.
REN server	Abbreviation for <i>real-time event notification server</i> in PeopleSoft MultiChannel Framework.
requester	In PeopleSoft eSettlements, an individual who requests goods or services and whose ID appears on the various procurement pages that reference purchase orders.
role	Describes how people fit into PeopleSoft Workflow. A role is a class of users who perform the same type of work, such as clerks or managers. Your business rules typically specify what user role needs to do an activity.
role user	A PeopleSoft Workflow user. A person's role user ID serves much the same purpose as a user ID does in other parts of the system. PeopleSoft Workflow uses role user IDs to determine how to route worklist items to users (through an email address, for example) and to track the roles that users play in the workflow. Role users do not need PeopleSoft user IDs.
roll up	In a tree, to roll up is to total sums based on the information hierarchy.
run control	A run control is a type of online page that is used to begin a process, such as the batch processing of a payroll run. Run control pages generally start a program that manipulates data.
run control ID	A unique ID to associate each user with his or her own run control table entries.

run-level context	In PeopleSoft Enterprise Incentive Management, associates a particular run (and batch ID) with a period context and plan context. Every plan context that participates in a run has a separate run-level context. Because a run cannot span periods, only one run-level context is associated with each plan context.
search query	You use this set of objects to pass a query string and operators to the search engine. The search index returns a set of matching results with keys to the source documents.
section	In PeopleSoft Enterprise Incentive Management, a collection of incentive rules that operate on transactions of a specific type. Sections enable plans to be segmented to process logical events in different sections.
security event	In commitment control, security events trigger security authorization checking, such as budget entries, transfers, and adjustments; exception overrides and notifications; and inquiries.
serial genealogy	In PeopleSoft Manufacturing, the ability to track the composition of a specific, serial-controlled item.
serial in production	In PeopleSoft Manufacturing, enables the tracing of serial information for manufactured items. This is maintained in the Item Master record.
session	In PeopleSoft Enterprise Learning Management, a single meeting day of an activity (that is, the period of time between start and finish times within a day). The session stores the specific date, location, meeting time, and instructor. Sessions are used for scheduled training.
session template	In PeopleSoft Enterprise Learning Management, enables you to set up common activity characteristics that may be reused while scheduling a PeopleSoft Enterprise Learning Management activity—characteristics such as days of the week, start and end times, facility and room assignments, instructors, and equipment. A session pattern template can be attached to an activity that is being scheduled. Attaching a template to an activity causes all of the default template information to populate the activity session pattern.
setup relationship	In PeopleSoft Enterprise Incentive Management, a relationship object type that associates a configuration plan with any structure node.
share driver expression	In PeopleSoft Business Planning, a named planning method similar to a driver expression, but which you can set up globally for shared use within a single planning application or to be shared between multiple planning applications through PeopleSoft Enterprise Warehouse.
single signon	With single signon, users can, after being authenticated by a PeopleSoft application server, access a second PeopleSoft application server without entering a user ID or password.
source transaction	In commitment control, any transaction generated in a PeopleSoft or third-party application that is integrated with commitment control and which can be checked against commitment control budgets. For example, a pre-encumbrance, encumbrance, expenditure, recognized revenue, or collected revenue transaction.
SpeedChart	A user-defined shorthand key that designates several ChartKeys to be used for voucher entry. Percentages can optionally be related to each ChartKey in a SpeedChart definition.
SpeedType	A code representing a combination of ChartField values. SpeedTypes simplify the entry of ChartFields commonly used together.
staging	A method of consolidating selected partner offerings with the offerings from the enterprise's other partners.

statutory account	Account required by a regulatory authority for recording and reporting financial results. In PeopleSoft, this is equivalent to the Alternate Account (ALTACCT) ChartField.
step	In PeopleSoft Sales Incentive Management, a collection of sections in a plan. Each step corresponds to a step in the job run.
storage level	In PeopleSoft Inventory, identifies the level of a material storage location. Material storage locations are made up of a business unit, a storage area, and a storage level. You can set up to four storage levels.
subcustomer qualifier	A value that groups customers into a division for which you can generate detailed history, aging, events, and profiles.
Summary ChartField	You use summary ChartFields to create summary ledgers that roll up detail amounts based on specific detail values or on selected tree nodes. When detail values are summarized using tree nodes, summary ChartFields must be used in the summary ledger data record to accommodate the maximum length of a node name (20 characters).
summary ledger	An accounting feature used primarily in allocations, inquiries, and PS/nVision reporting to store combined account balances from detail ledgers. Summary ledgers increase speed and efficiency of reporting by eliminating the need to summarize detail ledger balances each time a report is requested. Instead, detail balances are summarized in a background process according to user-specified criteria and stored on summary ledgers. The summary ledgers are then accessed directly for reporting.
summary time period	In PeopleSoft Business Planning, any time period (other than a base time period) that is an aggregate of other time periods, including other summary time periods and base time periods, such as quarter and year total.
summary tree	A tree used to roll up accounts for each type of report in summary ledgers. Summary trees enable you to define trees on trees. In a summary tree, the detail values are really nodes on a detail tree or another summary tree (known as the <i>basis</i> tree). A summary tree structure specifies the details on which the summary trees are to be built.
syndicate	To distribute a production version of the enterprise catalog to partners.
system function	In PeopleSoft Receivables, an activity that defines how the system generates accounting entries for the general ledger.
TableSet	A means of sharing similar sets of values in control tables, where the actual data values are different but the structure of the tables is the same.
TableSet sharing	Shared data that is stored in many tables that are based on the same TableSets. Tables that use TableSet sharing contain the SETID field as an additional key or unique identifier.
target currency	The value of the entry currency or currencies converted to a single currency for budget viewing and inquiry purposes.
template	A template is HTML code associated with a web page. It defines the layout of the page and also where to get HTML for each part of the page. In PeopleSoft, you use templates to build a page by combining HTML from a number of sources. For a PeopleSoft portal, all templates must be registered in the portal registry, and each content reference must be assigned a template.
territory	In PeopleSoft Sales Incentive Management, hierarchical relationships of business objects, including regions, products, customers, industries, and participants.
TimeSpan	A relative period, such as year-to-date or current period, that can be used in various PeopleSoft General Ledger functions and reports when a rolling time frame, rather

	than a specific date, is required. TimeSpans can also be used with flexible formulas in PeopleSoft Projects.
trace usage	In PeopleSoft Manufacturing, enables the control of which components will be traced during the manufacturing process. Serial- and lot-controlled components can be traced. This is maintained in the Item Master record.
transaction allocation	In PeopleSoft Enterprise Incentive Management, the process of identifying the owner of a transaction. When a raw transaction from a batch is allocated to a plan context, the transaction is duplicated in the PeopleSoft Enterprise Incentive Management transaction tables.
transaction state	In PeopleSoft Enterprise Incentive Management, a value assigned by an incentive rule to a transaction. Transaction states enable sections to process only transactions that are at a specific stage in system processing. After being successfully processed, transactions may be promoted to the next transaction state and “picked up” by a different section for further processing.
Translate table	A system edit table that stores codes and translate values for the miscellaneous fields in the database that do not warrant individual edit tables of their own.
tree	The graphical hierarchy in PeopleSoft systems that displays the relationship between all accounting units (for example, corporate divisions, projects, reporting groups, account numbers) and determines roll-up hierarchies.
unclaimed transaction	In PeopleSoft Enterprise Incentive Management, a transaction that is not claimed by a node or participant after the allocation process has completed, usually due to missing or incomplete data. Unclaimed transactions may be manually assigned to the appropriate node or participant by a compensation administrator.
universal navigation header	Every PeopleSoft portal includes the universal navigation header, intended to appear at the top of every page as long as the user is signed on to the portal. In addition to providing access to the standard navigation buttons (like Home, Favorites, and signoff) the universal navigation header can also display a welcome message for each user.
user interaction object	In PeopleSoft Sales Incentive Management, used to define the reporting components and reports that a participant can access in his or her context. All Sales Incentive Management user interface objects and reports are registered as user interaction objects. User interaction objects can be linked to a compensation structure node through a compensation relationship object (individually or as groups).
variable	In PeopleSoft Sales Incentive Management, the intermediate results of calculations. Variables hold the calculation results and are then inputs to other calculations. Variables can be plan variables that persist beyond the run of an engine or local variables that exist only during the processing of a section.
VAT exception	Abbreviation for <i>value-added tax exception</i> . A temporary or permanent exemption from paying VAT that is granted to an organization. This terms refers to both VAT exoneration and VAT suspension.
VAT exempt	Abbreviation for <i>value-added tax exempt</i> . Describes goods and services that are not subject to VAT. Organizations that supply exempt goods or services are unable to recover the related input VAT. This is also referred to as exempt without recovery.
VAT exoneration	Abbreviation for <i>value-added tax exoneration</i> . An organization that has been granted a permanent exemption from paying VAT due to the nature of that organization.
VAT suspension	Abbreviation for <i>value-added tax suspension</i> . An organization that has been granted a temporary exemption from paying VAT.
warehouse	A PeopleSoft data warehouse that consists of predefined ETL maps, data warehouse tools, and DataMart definitions.

work order	In PeopleSoft Services Procurement, enables an enterprise to create resource-based and deliverable-based transactions that specify the basic terms and conditions for hiring a specific service provider. When a service provider is hired, the service provider logs time or progress against the work order.
worksheet	A way of presenting data through a PeopleSoft Business Analysis Modeler interface that enables users to do in-depth analysis using pivoting tables, charts, notes, and history information.
worklist	The automated to-do list that PeopleSoft Workflow creates. From the worklist, you can directly access the pages you need to perform the next action, and then return to the worklist for another item.
XML schema	An XML definition that standardizes the representation of application messages, component interfaces, or business interlinks.
yield by operation	In PeopleSoft Manufacturing, the ability to plan the loss of a manufactured item on an operation-by-operation basis.
zero-rated VAT	Abbreviation for <i>zero-rated value-added tax</i> . A VAT transaction with a VAT code that has a tax percent of zero. Used to track taxable VAT activity where no actual VAT amount is charged. Organizations that supply zero-rated goods and services can still recover the related input VAT. This is also referred to as exempt with recovery.

Index

Numerics/Symbols

- 360-Degree View
 - accessing 256
 - customer 253
 - date filters 262
 - EIPs 227
 - integrations, overview of 227
 - interactions, displaying 217
 - interactions, overview of 226
 - links, defining for user 249
 - profiles, setting up 241
 - roles, configuring for 241
 - search page, configuring for 248
 - search pages 248
 - search preferences, defining 251
 - setting up 225, 227
 - subinteractions, defined 226
 - system data 227
 - toolbar 255
 - transactions performed using 229
 - understanding 225
 - using 253
- 360-Degree View page 259
- 360-Degree View Search page 257
- 360-Degree View Search Preferences page 249, 251
- 360-Degree View tree
 - configuration 238
 - interaction nodes 226
 - nodes, overview of 226
 - nodes, setting up 238
 - overview 225
 - setting up 231, 237
 - setting up for mobile 237
 - testing 239

A

- Account page 69
- account preferences
 - defining 78
- active analytics framework (AAF), use of terms in SmartViews 403
- Add Membership List page 93
- Add View List page 94
- additional documentation xxii

- Address Book - Contact Information page 288, 294
- Address Book - Create New Address page 285, 287, 288, 291, 296, 297
- Address Book - Create New Contact page 287, 292
- Address Book - Customer's Primary Information page 290, 296
- Address Book - Delete Confirmation page 296, 297
- Address Book - new address - Select Address page 287, 293, 296, 297
- Address Book - Select Contact page 287, 293
- Address Book - Update Address page 288, 295, 297
- Address Book (View Addresses) page 288
- Address Book (View Contacts) page 289
- Address Book page 297
- Address Book: Customer's Primary Information page 287
- Address Book: View Addresses page 287
- Address Book: View Contacts page 287
- address books
 - maintaining 287
 - maintaining consumer 296
- Address Format page 31
- address information
 - alternate characters in 134
 - for UK 32
 - setting up 30
- AE program, *See* application engine (AE) program
- Agreement Line page 359, 366
- Agreement page 359
- agreement pricing
 - calculating and recalculating prices 342
 - calculating line prices 341
 - structures 387
 - types of pricing records 341
 - understanding 340
- Agreement Template page 352
- agreements
 - accessing leads generated for agreement renewal 382

- agreement lines, defining 366
- billing information, defining 374
- creating leads for agreement
 - renewal 382
- data model 340
- default values for agreement lines,
 - defining 355
- defining default entitlements 364
- defining header information 359
- defining people or site coverage 363
- entitlement matches 392
- pricing structures 387
- purchase options 386
- renewal lead time, defining 382
- setting up and managing 337
- template entitlements, defining 354
- templates, defining 352
- types of 338
- understanding 337, 358
- understanding lead generation for
 - agreement renewal 380
- used in order capture 342
- Alt Character page 23, 135
- alternate character
 - character sets 135
 - configuring system 134
 - display 134
 - double-byte-enabled operating
 - system 133
 - enabling 75
 - enabling for user 135
 - entering 134
 - functionality 133
 - implementing 133
 - phonetic name sort 133
 - search fields 135
 - searches 134
 - setting up language code 135
 - understanding 133
- Anonymous Object page 23
- API based direct data access 54
- API based SQL data access 54
- Application Class field, Define Node
 - page 235
- Application Class, calling from 360-Degree
 - View 251
- application engine (AE) program
 - generating leads for agreement
 - renewal 381
- application fundamentals xxi
- application messages
 - for competencies 167
 - See Also* EIPs
- application packages 240
- Application Packages Lookup page 232, 240, 249
- application security 44
 - defining 92
 - enterprise administration 44
 - terminology 44
- Apply Security page 70
- Apply Security Setup page 68
- Assign Group Criteria page 162, 184
- Assign Role Privileges page 83, 85
- Assign User Privileges page 83
- assignment
 - candidate selection, understanding 178
 - case load for group members,
 - displaying 179
 - competency score on cases,
 - calculating 181
 - competency score on service orders,
 - calculating 179
 - criteria used 174
 - fit score, calculating 179
 - group members, reviewing and
 - assigning 192
 - product score on service orders or cases,
 - calculating 182
 - provider groups and group members,
 - evaluating 178
 - provider groups, reviewing and
 - assigning 190
 - searches, setting up 183
 - searches, understanding 173
 - service orders and cases using
 - competencies 167
 - weighting factors for criteria 176
 - weighting factors for group member
 - criteria, establishing 188
 - weighting factors for provider group
 - criteria, establishing 187
 - workforce availability 178
 - workforce to service orders or cases,
 - understanding 173
- Assignment Criteria page 184
- assignment engine
 - case-specific criteria 175
 - criteria used 174
 - description 174

- service-order specific criteria 176
 - specifying setup 189
- Assignment Setup 185
- Assignment Setup page 189
- assignments
 - data model 176
- attachment servers, specifying 112
- attachments
 - adding 119
 - file names on FTP server 112
 - product 119
 - storing on server 112
 - uploading to server 119
- audiences
 - generating 412
- audiences, SmartViews 405
- Audit - Setup page 139, 140
- audit record, understanding 138
- audits
 - controlling audit trail display 141
 - events 137
 - selecting actions to audit 140
 - setting up 139
 - setting up for inbound email
 - component 140
 - system performance impact 137
- Auto Numbering page 20
- Auto Reciprocate field 130
- automatic assignments 152
- automatic numbering, *See* autonumbering
- autonumbering
 - number type, specifying 21
 - objects using NONE setID 18
 - objects using SHARE setID 18
 - PeopleSoft Computer Telephony
 - Interface (CTI) 21
 - prefix, specifying 21
 - rules 17
 - rules, activating 21
 - rules, defining 20
 - setIDs 17, 21

B

- Billing and Pricing Options page 23
- Billing Details page 359, 374
- BU/Location Node Mapping page 472
- BU/Par Location Node Mapping page 472
- business analysis modeler (BAM)
 - interactive reports 121
 - purpose of 4

- business interlink transactions,
 - processing 427
- business object search processing 52
- business object searches
 - enabling alternate character in 135
- Business Unit field
 - implementing security for 70
- Business Unit Security by Permission List
 - page 68, 71
- Business Unit Security by User ID
 - page 68, 72
- business units
 - controls 10
 - creating 13
 - default for user 73
 - purposes 8
 - security 8
 - setup tables 11
 - understanding 7
- Business units, setIDs, and tableSet controls
 - diagram 12
- Business User Registration page 86, 279, 280
- Business User Registration Setup page 83
- BusUnit Mapping page 471

C

- Calendar Options page 23, 25, 198
- Calendar/Task EIP 210
- calendars
 - daily, viewing and updating 207
 - holiday schedules 197
 - integrating with third-party
 - applications 210
 - monthly, viewing and updating 209
 - setting up 205
 - setting up options 22
 - understanding 205
 - understanding options 19
 - weekly, viewing and updating 208
- Call Center Definition page 15
- Call Center Preferences page 69, 76
- Callback Interaction field, Set Up Tree
 - page 238
- campaigns, note types for 112
- Candidate Detail page 194, 195
- Candidate Summary page 194
- Case and Solution Note Type page 113
- Case History page 137
- Case Notes page

- Notes List 115
- cases
 - component object name for
 - auditing 140
- cases, defining note types for 112
- catalog security 53
- Catalogs page 272, 274
- Category page 184
- CDM note type 113
- Change Management page 69, 77
- character set, selecting for alternate
 - character 135
- Chat Enabled Page Setup page 270
- Chat page 221
- chunking
 - overview 470
 - setting up 469
- client manager 75
- Clone Tree As page 232
- CM_REVW_RATING_TBL 169
- CM_TYPE_TABLE 169
- comments, submitting xxv
- common elements xxv
- companies, defining note types for 112
- company name, alternate characters
 - in 134
- competencies
 - assigning workers to service orders and
 - cases, understanding 167
 - defining 170
 - minimum requirements for service orders
 - or cases, defining 172
 - PeopleSoft HRMS, synchronizing
 - with 25
 - proficiency levels, defining 171
 - rating models, defining 169
 - types, defining 170
- Competencies page 169, 170
- Competency Rating Model page 169
- Competency Types page 169, 170
- COMPETENCY_TABLE 169
- Component Name field 140
- Conditions for Creating Interactions
 - table 215
- Configure My SmartView Profile
 - page 418, 422
- Configure Role page 241, 243
- Configure Search Save page 408
- Confirmation page 276
- Consumer Notes page
 - Notes List 115
- consumers, defining note types for 112
- Contact Directory page 298
- contact information xxv
- contact methods
 - interactions 214
- Contact Methods Interaction Statuses
 - table 215
- Contact Notes page
 - Notes List 115
- Contact Us notifications
 - defining workflow for 269
 - understanding 267
- Contact Us page 298
- Contact Us Subject page 270, 271
- Contact Us Topic page 270, 271
- Copy Transaction Group As page 229
- correspondence
 - interactions, viewing details 224
 - salutation codes, setting up 33
- cost categories
 - defining 153
- Cost Categories page 153
- Country Description page 31
- Country field, Location Definition
 - page 29
- Create Campaign page 418
- Create Correspondence page 418
- Create Dialog page 418
- Credit Card EIP 4
- cross-product
 - functionality, implementing 4
 - integrations 4
- cross-references xxiv
- currencies
 - adding or updating 128
 - conversion 126
 - direct rate quotation 129
 - exchange rate calculation 130
 - indirect rate quotation 129
 - ISO standard 125
 - quotations 129
 - quote units 125, 129
 - rate quotations 125, 126
 - reciprocal values table 127
 - reciprocation 130
 - scale, defining 128
 - setting up 128
 - symbols, defining 128
 - triangulation 126

- triangulation, overriding cross rate 130
- understanding 125
- using euro conventions to translate 31
- Currency Code page 128
- Currency Code table 125
- Currency Exchange Calculator page 130
- currency exchange rates 126
- Currency Quotation Method page 127, 128, 129
- Currency Symbol field 128
- Customer 360-Degree View 253
- Customer 360-Degree View sections table 253
- Customer Connection website xxii
- Customer ID Chunk page 472
- Customer Notes page
 - Notes List 115
- Customer Relationship management
 - integration points
 - managing 427
 - understanding 427
- Customer Selection page 282
- customers
 - managing activities in 360-Degree View 259

D

- Daily Calendar page 207
- data cache 54
- datamart, SmartViews 404
- Date Filter field
 - 360-Degree View page 261
 - 360-Degree View tree 238
- date filters, 360-Degree View 262
- Default Entitlements page 359, 364
- default values
 - agreement lines, defining 355
 - entitlements, defining 354
- Default Work Days field 26
- Define Node page 232
- Define Transaction Group page 229
- Define Transaction Type page 229
- Definitional API 54
- Delete Confirmation page 285, 288
- Direct field, Currency Quotation Method page 129
- direct rate quotations, currency 126
- documentation
 - printed xxii
 - related xxii

- updates xxii
- double-byte-enabled operating system 133
- Dynamic Grid page 232
- dynamic membership lists 47
- dynamic view lists 47

E

- Effective Date field
 - Currency Exchange Calculator page 131
- EIP - (Synchronous) field 236
- EIPs (enterprise integration points)
 - Credit Card 4
 - Person Competency 25, 167
- Email History page 137
- enterprise administration 44
- Entitlement Defaults page 352, 354
- Entitlement Match page 395, 396
- Entitlement Plan Setup page 349
- entitlement searches 391
- entitlements
 - adjusting 342
 - defining 346
 - defining for agreements 354, 364
 - matches from agreements 392
 - matches from warranties 392
 - minimum search requirement 392
 - performing searches 395
 - plans, defining 349
 - searches for cases and service orders, understanding 391
 - selecting agreement or warranty match 396
 - types of 347
 - understanding 346
 - used in order capture 342
- Entitlements page 346
- errors
 - resolving with last number type 19
- ESRI integration 25
- event history 137
- exchange rates
 - quotations 126
- Existing Customer User Registration Setup page 83, 85
- existing products, updating registration for 267
- expired
 - agreements, renewing 380

F

- Field page 135
- field service agreements 338
- fields
 - appearing in 360-Degree View tree 236
- FieldService Definition page 15
- files
 - attaching to notes 119
 - attachments, naming 112
- filters
 - dates in 360-Degree View 262
 - smart view reports 121
- fit score
 - calculation 179
 - description 173
- flat purchase option 386
- Forgot Password - Email New Password page 276, 278
- Forgot Password page 276, 278
- FSI security 52
 - See Also* Financial Services Industry security
- functional groups
 - defining 105
- functional option classes 54
- functional option codes 48
- Functional Option Group page 94
- functional option groups 45, 48
- Functional Option page 94
- functional options 45, 48
 - configuring 52
 - conflict resolution 51
 - conflict solution 54
 - defining 104

G

- general options
 - calendars 19
 - regions 20
 - understanding 17
- General Options page 23, 382
- Geo Code (Geocode) Integration field 25
- globally unique identifiers, *See* GUIDs
- glossary 495
- Group Competencies page 162, 164, 184
- group members
 - assigning to service orders or cases 192
 - availability 178
 - case load display 179

- defining 158
- evaluating for system-suggested assignment 178
- service order and case assignment, types of 152
- understanding 151
- Group Weighting Factors page 185, 187
- guest IDs
 - defining 268
 - in self-service 278
 - language codes 269
- guest users
 - setting up for self-service 87
- GUIDs 19

H

- help desk agreements 339
- Holiday Load page 202
- Holiday Schedule page 198
- holiday schedules
 - associating with provider groups 201
 - associating with workers 201
 - defining 197
 - Load Holiday process (RF_HOLIDAY) 202
 - understanding 197
 - updating workers' calendars with 201
- HOLIDAY_SCHED_TBL 198
- HRHD EIP Options page 23

I

- implementation 4
- implicit view lists 47
- In City Limit field 29
- IN_MST_ITEM_XLS 431
- Inbound Email page 220
- inbound transactions
 - processing 429
 - understanding architecture 429
 - using 431
- Indirect field, Currency Quotation Method page 129
- indirect rate quotations, currency 126
- Infosync, *See* PeopleSoft Infosync
- installation options, setting up 22
- integration points, managing Customer Relationship management 427
- integrations
 - 360-Degree View 227

- cross-product 4
- Environmental Systems Research Institute, *See* ESRI integration
- Interaction Detail page 218
- Interaction History grids 218
- Interaction List page 218, 220, 221
- Interaction Nodes
 - diagram 226
- Interaction page 220, 223
- Interaction Status page 219
- interactions
 - 360-Degree View 226
 - chat session 218
 - contact methods 214
 - correspondence details 224
 - creating 215
 - displaying 217
 - displaying subinteractions 222
 - email 218
 - external customers 213
 - searching for 222
 - setting status of 238
 - statuses 215, 219
 - statuses, modifying descriptions 218
 - understanding 213
 - using Contact Us messages 267
 - viewing 219
 - viewing details 218
 - workers 213
- Interactions - View Correspondence page 218, 224
- interactive reports
 - delivered with PeopleSoft Enterprise CRM 122
 - dimensions 121
 - filters 121
 - launching 123
 - servers 123
 - understanding 121
- ISO standard currencies 125

J

- Job Detail page 183

K

- key fields, required for views 235

L

- languages

- architecture for alternate character 133
- self-service 265
- setting up for alternate character 135
- Last Number field 22
- Last Number Setup page 20, 21
- Last Number table 19
- last numbers
 - adding new types 22
 - displaying 21
 - in autonumbering 17
 - reserved for delivered data 22
 - specifying 21
 - testing functionality 22
 - types 19
 - understanding 19
- Lead - Discover page 382
- Lead Notes page
 - Notes List 115
- lead time, defining for agreement renewal 382
- leads
 - accessing leads generated for agreement renewal 382
 - creating for agreement renewal 382
 - understanding lead generation for agreement renewal 380
- list of PeopleSoft provided inbound transactions 431
- list out PeopleSoft provided outbound transactions 441
- Location Definition page 28
- Location Detail page 28, 29
- Location Timezone page 28, 30
- locations
 - defining tax jurisdiction 29
 - defining time zones 30
 - setting up 30

M

- Map Business Unit page 471
- Map Node to ChunkRule page 471
- Map Set IDs page 472
- market, specifying licensed 25
- Marketing Definition page 15
- Master Item Load Component
 - interface 431
- Master Item Vendor Load Component 431
- Member Weighting Factors page 185, 188
- membership list 44

- dynamic 100
- static 99
- Membership List page 97
- membership objects
 - selecting 98
- membership types
 - selecting 99
- Metric page 408, 409
- metrics, SmartViews 403
- MMA Partners xxii
- Mobile field, Set Up Tree page 237
- Monthly Calendar page 207, 209
- My SmartViews page 418

N

- name information
 - for Japan and Southeast Asia 134
- No Security field 69
- Node Sub-Interactions page 241, 246
- nodes
 - 360-Degree View tree 226
 - defining 232
 - defining types and placeholders 235
 - interaction 226
- Note Summary page
 - Notes List component 117
- Note Type page 113
- Note Types for Business Objects table 112
- notes xxiv
 - adding attachments 112
 - attaching files to 119
 - attaching to objects 118
 - case 112
 - CDM type 113
 - components that use notes 111
 - creating product 114
 - creating standard 114
 - detail information 118
 - details view 111
 - entering 115, 116
 - entering details 117
 - interactions 213
 - pages on components 111
 - selecting for reporting 114
 - setting up types 113
 - summary view 112
 - types 112
 - viewing 115
- Notes
 - summary information 118

- Notes List
 - Case Notes page 115
 - Consumer Notes page 115
 - Contact Notes page 115
 - Customer Notes page 115
 - Lead Notes page 115
 - Opportunity Notes page 115
- Notes List component 111
- Notes page 114
- notifications, *See* Contact Us notifications
- number prefixes 17
- Number Type field 21

O

- Opportunity Notes page
 - Notes List 115
- OPR_DEF_TABLE_RB1 69
- OPR_DEF_TABLE_RC 69
- OPR_DEF_TABLE_RG 69
- OPR_DEF_TABLE_RSf 69
- OPR_DEF_TABLE_RSP 69
- Order Capture Definition page 15
- orders and quotes, defining note types
 - for 112
- Outbound Email page 221
- outbound messages, publishing 472, 473
- outbound transactions
 - processing 440
 - understanding architecture 440
 - using 441
- Overall Preferences page 69, 73, 135

P

- Package Tree Viewer link
 - Define Node page 235
 - Set Up Profile page 243
 - User Links page 251
- payment information
 - billing 376
- Payment Terms page 35
- payment terms, setting up 35
- PeopleBooks
 - ordering xxii
- PeopleCode, typographical
 - conventions xxiii
- PeopleSoft application fundamentals xxi
- PeopleSoft Bill Presentment and Account Management, information in 360-Degree View 227

- PeopleSoft business analysis modeler, *See* business analysis modeler (BAM)
- PeopleSoft Computer Telephony Interface (CTI), autonumbering 18, 21
- PeopleSoft CRM
 - application fundamentals overview 3
- PeopleSoft Financial Management Solutions
 - integration with 360-Degree View 4, 227
- PeopleSoft HRMS 4
 - synchronizing competency profiles 25
- PeopleSoft Human Resources Management, *See* PeopleSoft HRMS
- PeopleSoft Infosync 205
- PeopleSoft Integrated FieldService
 - guaranteed response time 347
 - guaranteed restore time 347
 - service level 348
- PeopleSoft Phone Number Administration
 - number management 28
- PeopleSoft Sales CRM
 - territory assignment 28
- PeopleSoft Supply Chain Management, *See* PeopleSoft Supply Chain Management (SCM)
- PeopleSoft Supply Chain Management (PeopleSoft SCM)
 - integration with 360-Degree View 227
 - synchronizing data 4
- PeopleTools
 - control tables 14
 - GUIDs 19
- Permission List Level Security field 70
- Person Competency EIP 25
- person name, alternate characters in 134
- Personal Identification Number (PIN) 364
- personal information manager, *See* PIM
- Personalize Template page 418, 423
- PIM 4, 205
- PIN, *See* Personal Identification Number (PIN)
- plans, for audiences and segments in SmartViews 406
- PO Chunk Shipto page 472
- Portal Content Reference field
 - Define Node page 235
 - Define Transaction Group page 231
 - User Links page 251
- predefined system data
 - 360-Degree View 227
 - preferred markets 43
 - prefix for automatic numbering 21
 - prepaid purchase option 386
 - prerequisites xxi
 - Pricing Information page 388
 - pricing information, defining for services and support offerings 385
 - pricing records
 - establishing 385
 - understanding 385
 - valid data combinations 387
 - pricing structures 387
 - printed documentation xxii
 - Privacy Policy page 83, 91
 - privilege codes
 - custom 81
 - understanding 80
 - Privileges Codes table 80
 - Problem Type page 184
 - product catalogs
 - registering new products in 268
 - product definitions
 - assigning sales regions 28
 - Product Note Type page 113
 - product registration
 - existing products 267
 - new products 268
 - setting up 272
 - understanding 267
 - using the 360-degree view 268
 - Product Registration - Product Registration Details page 300, 301
 - Product Registration page 300
 - Product Registration Setup page 272
 - products
 - creating notes 114
 - entering registration information 301
 - registering 300
 - registering through 360-degree view 301
 - Profile - Change Name page 283
 - Profile - Change Password Hint page 283
 - Profile - Change Password page 283
 - Profile - Contact Information page 285, 296
 - Profile - Default Addresses page 285, 296
 - Profile - Name and Sign In page 283
 - Profile page 296
 - provider group data model 151

Provider Group Detail page 191, 192
 Provider Group Member page 155, 158
 Provider Group Summary page 191
 provider groups
 assigning to service orders or cases 190
 assignment criteria, defining 162
 availability 178
 competencies, defining 164
 defining 156
 evaluating for system-suggested
 assignment 178
 prerequisites for defining 155
 schedules, defining 160
 service order and case assignment, types
 of 152
 understanding 151
 Provider Groups page 155, 156
 province codes, adding or modifying 33
 Publish Outbound Message page 473
 purchase options 386

Q

Quality Definition page 15
 Quick Map page 471, 472
 Quote Units field 129
 quote units, currency 125

R

rate decimal positions 127
 rate quotations, currency 125
 rates, *See* currencies
 RB_NOTES_LIST component 111
 RB_ROLE_WORKER 69
 RB_SRTY_PRIV 83
 RB_SRTY_PRIV_DELTA 83
 RB_SRTY_PRIV_DFLT 83
 RB_TSK_CALENDAR 207
 RC_CA_TY_DE_PNL 184
 RC_CATEGORY 184
 RC_PROBTYPE 184
 RD_WORKER_CMP_PROF 183
 RD_WORKER_CRITERIA 184
 RD_WORKER_DETAIL 183
 RD_WORKER_SCHEDULE 183
 Recent Interactions pagelet 218
 reciprocal values for currencies table 127
 reciprocation
 auto reciprocate 127, 130
 cross-rate allow override 127

cross-rate recalculate 127
 primary visual rate 127
 quote units 127
 rate decimal positions 127
 rate quotation basis 127
 reference currency 127
 Record Group page 14, 15
 record groups
 control table 10
 Record(Table) Name field
 Audit Setup page 140
 Reference Currency field 130
 Refresh Dynamic Lists page 95, 108
 Region page 27
 regions
 category codes 27
 general options 20
 hierarchy 28
 sales 27
 setting up 27
 statuses 28
 types 28
 Register as a business user for <company>
 page 281
 registered user access 277
 Registration Confirmation page 279, 281
 Registration Fields 273
 Registration page, for business user 280
 Registration page, for personal user 279
 related documentation xxii
 Related Products page 352
 Related Transaction Groups page 229
 Relationship Viewer page 259
 renewal of agreements, setting up 381
 representatives, defining note types
 for 112
 RF_ASSIGN_DET_SEC 194
 RF_ASSIGN_LIST_SEC 194
 RF_ASSIGN_PG_SEC 191
 RF_ASSIGN_PGDT_SEC 191
 RF_ASSIGN_WGHT_PG 185
 RF_ASSIGNMENT_WGHT 185
 RF_ENTL_LIST_SEC 395
 RF_GRP_MEMBER 155
 RF_HOLIDAY (Load Holiday
 process) 202
 RF_INSTALLATION 198
 RF_PRD_RATE_MDL 185
 RF_PROVGRP_TIME 160, 184
 RF_PROVIDER_GRP 155

RF_PRV_GRP_CRIT 162, 184
 RF_PRVGRP_COMP 162, 184
 RF_SERVICE_ACT 184
 RF_SERVICE_ATTRIB 184
 roles 59
 capturing subinteractions for 245, 246
 configuring for 360-Degree View 241, 243
 system IDs 59
 row-level security options 42
 Row-Level Security Options table 42
 row-level security views
 understanding 57
 RSEC_BUILDER 53
 RSEC_BUILDER_RUN 95
 RSEC_CUSTOMER_SRCH 94
 RSEC_DAEMON 53
 RSEC_FUNC_DEFN 94
 RSEC_FUNC_GROUP 94
 RSEC_MEMBER_SMRY 93
 RSEC_ML_CUSTOMER 94
 RSEC_ML_PART_C 94
 RSEC_ML_PARTNER 94
 RSEC_ML_PERSON 94
 RSEC_ML_ROLE 94
 RSEC_OBJECT_DEFN 93
 RSEC_PART_CON_SRCH 94
 RSEC_PARTNER_SRCH 94
 RSEC_PROFILE 94
 RSEC_PROFILEMEMBER 94
 RSEC_PRSN_SRCH 94
 RSEC_SRTY_WIZ1 93, 94
 RSEC_SRTY_WIZ2 93, 94
 RSEC_STAT_MENU 95
 RSEC_VIEW_SMRY 94
 RSEC_VL_CATALOG 94
 RSEC_VL_CUSTOMER 94
 RSEC_VL_HOLD 94
 RSEC_VL_RA_METRICS 94
 RSF_TF 198
 RSF_TF_MAIN 198
 run control page for interactive reports 123
 RUN_CNTL_RF1000 202
 RUN_FIN9001 68
 Runtime API 53
 RX_CUST_REG_TABLE 83
 RX_GUEST_TEMPLATE 83
 RX_PRIVACY_SETUP 83
 RX_REGTXT_SETUP 83

RX_REP_REG_TABLE 83
 RX_TERMS_SETUP 83

S

Sales Definition page 15
 Sales Lead Generation for Agreement Renewal page 382
 Sales Lead Generation for Agreement Renewal process (RF_AGR_LEAD) 382
 Sales Preferences page 69, 77
 sales quota rollups
 defining 197
 sales regions and territories, defining 27
 Salutation Table page 33
 Schedule - Provider Groups page 184
 Schedule page 160
 Schedule Updates page 408, 413
 Scope Details page 359, 363
 Search Field Setup page 135
 Search group box, Interactions page 222
 searches
 360-Degree View 248
 interactions 222
 using alternate character 134
 SEC_BU_CLS 68
 SEC_BU_OPR 68
 SEC_SETID_CLS 68
 SEC_SETID_OPR 69
 Secured Worker Role page 69, 79
 security 39
 application 44
 application framework 45
 build process 108
 building blocks 39
 dataset 42
 delegated administration 55
 distributed 55
 implementing for self-service 80
 PeopleTools 41
 permission lists 42
 portal registry 41
 predefined roles 58
 preferred market 43
 role grants 55
 roles 42
 row-level 42
 runtime 53
 sample users 58
 setting system-wide options 68

- SmartViews 406
- system-wide options 56
- terminology 40
- user groups 56
- security framework 55
- security list record 45
- security object 44
- Security Object page 93, 95
- security objects 46
- Security Options page 68, 69
- Security Privilege Code Setup page 83
- security profile 45
 - functional option groups, adding 107
 - membership lists, adding 108
 - view lists, adding 107
- Security Profile - Membership page 94
- security profile definition 46
- Security Profile page 94
- security terminology 44
- Security Type Function table 40
- Security View Name Suffix table 57
- Security View Names page 68, 70
- SECURITY_OPTIONS 68
- SECURITY_VIEWS 68
- segments, SmartViews 405
- Self Service Registration page 83, 90
- self-service
 - Contact Us, defining 271
 - contacting us by chat 299
 - creating contact addresses 291
 - creating customer addresses 291
 - creating customer contacts 292
 - defining guest IDs 268
 - deleting consumer addresses 297
 - emailing new passwords 278
 - entering product registration information 301
 - guest access 276, 278
 - labeling the guest ID selection field 269
 - maintaining address relationships for customer contacts 294
 - maintaining consumer address books 296
 - maintaining consumer information 295
 - maintaining contact address books 286
 - maintaining contact information 284
 - maintaining customer profile information 282
 - maintaining name information for customer contacts 294
 - maintaining role information for customer contacts 294
 - registered user access 277
 - registering 278
 - registering existing customers 266
 - requesting new passwords 278
 - reviewing customer addresses 288
 - reviewing customer contacts 289
 - reviewing customers primary information 290
 - reviewing name and sign-in information 283
 - reviewing primary contact information 285
 - security 266
 - security, implementing 83
 - selecting customers represented by business user 282
 - selecting existing addresses 293
 - selecting existing contacts 293
 - sending Contact Us messages 298
 - sending feedback 298
 - setting up guest users 87
 - setting up multiple sites 265, 268
 - signing in 276
 - understanding 265, 275
 - updating customer or contact addresses 295
 - viewing consumer addresses 297
 - viewing internal contacts 298
 - working with 275
- self-service, live chat 267
- sensitive worker security 58
- servers
 - attachment 112
- Service Activities page 184
- Service Details page 184
- Service Level page 344
- service levels
 - defining 343
- service levels, defining 344
- Service Pricing page 388
- services management orders, defining note types for 112
- Set Template Metric History page 418, 424
- Set Up Profile page 241
- Set Up Tree page 232, 237
- SetID field
 - implementing security for 70

SetId Mapping page 472

setIDs

- autonumbering 21
- creating 14
- default for business unit 13, 14
- default for user 73
- record groups 11, 14
- setup tables 11
- shared 9, 12
- tableset controls 14

setup tables

- complex 12
- diagram 11

Setup Vendor to Node page 472

Sign In page 276, 279

SIN, *See* Site Identification Number (SIN)

single signon, enabling for 360-Degree view 227

Site Identification Number (SIN) 364

sites

- self-service 265

sites, defining note types for 112

Skills and Competencies page 183

SmartView Template page 408, 411

SmartViews

- configuring 422
- configuring display options for historical data 424
- data storage 404
- defining metrics 409
- defining system data 408
- defining templates 411
- generating audiences 412
- metrics and terms 403
- personalizing 423
- process flow 401
- scheduling processes for caching data 413
- security 406
- specifying time frames for metric updates 410
- templates, types of 402
- viewing 418
- viewing scheduled update results 414

SmartViews System Data page 408

solutions, defining note types for 112

Source Code Chunk page 472

SQL and query based data access 54

Standard Notes page 114

Start Seq field 21

state codes

- numeric 33

state codes, adding or modifying 33

State page 31, 33

static membership lists 47

Static Menu Transfer page 95, 109

static view lists 47

statuses

- location 29

subinteractions

- 360-Degree View 226
- types 214
- understanding 213

suggestions, submitting xxv

support agreements 339

system IDs, 59

system-suggested assignments 152

T

tableSet Control page 15

TableSet Security by Permission List page 68, 72

TableSet Security by User ID page 69, 73

tablesets

- controls 9, 10, 13
- using with business units 9

Task Type EIP 210

Template Line page 352, 355

templates for agreements 352

terms 495

terms and condition setup 91

terms and conditions setup 90

Terms of Service page 83, 90

terms, SmartViews 403

Test Your Tree page 232, 239

time and material purchase option 387

time frames

- defining 197

time zones, assigning to locations 30

toolbars

- 360-Degree View 255

transaction 45

Transaction Group page 229

transaction groups

- defining for 360-Degree View 229
- transfer types 230

Transaction Sub-Interactions page 241, 245

transactions

- viewing online reports of 121

tree configuration, 360-Degree View 238
 Tree Node page 232, 238
 tree nodes, *See* nodes
 triangulation, currency 126, 130
 Type and Detail page 184
 typographical conventions xxiii

U

understanding
 integration points 427
 units of measure (UOMs)
 converting 36
 setting up 35
 Units of Measure page 35
 Update page 408, 410
 Use Only Evaluation Type field 25
 User ID Level Security field 70
 user IDs 59
 communications 61
 energy 66
 field service 60
 FSI 61
 government 62
 help desk 59
 high tech 62
 insurance 66
 marketing 62
 multichannel applications 67
 order capture 64
 order capture self service 65
 partner relationship management 67
 quality 66
 real time advisor 65
 sales 63
 services management 64
 strategic account planning 67
 support 59
 wealth management 68
 User Links page 249
 user preferences
 Call Center Preferences page 76
 Overall Preferences page 73
 User Preferences - Overall Preferences
 page 135
 User Privileges page 84
 User Registration page 87
 User Registration Setup page 83

V

values, for fields in 360-Degree 236
 View Correspondence page 220
 view list 45
 dynamic criteria, choosing 103
 static, adding customers 102
 view type, selecting 102
 view list names
 adding 101
 view objects
 selecting 101
 View Type field, Configure Role page 245
 View Updates Result page 408, 414
 views
 security view name suffixes 57
 visual cues xxiv

W

warnings xxiv
 warranties
 critical times 379
 defining 378
 description 338
 entitlement matches 392
 entitlements 380
 setting up and managing 337
 understanding 337, 377
 Warranty page 378
 wealth management 75
 Weekly Calendar page 207, 208
 weighting factors
 establishing 187
 overview of 176
 Work Schedule page 183
 workday information, defining 198
 worker calendars, *See* calendars
 workers
 associating with provider groups 186
 See Also group members
 creating interactions 213
 defining locations 28
 workflow, Contact Us 269